Tourism and COVID-19: Mapping a Way Forward for Small States

London, Marlborough House
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The Commonwealth

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1. Introduction

The global tourism industry plunged in 2020 after the COVID-19 pandemic hit. The sector's demise has had far-reaching effects, particularly for small states, which depend on it almost exclusively for foreign exchange inflows and a large proportion of their gross national income. Of the economic, social and environmental impacts, the most severe have been in employment where an estimated 100–120 million direct tourism and hospitality jobs have been threatened by the crisis (UNWTO 2020). While larger countries like the USA, France and Spain have suffered the highest revenue losses in absolute terms, the countries that have been dealt the largest blow are those where tourism gross domestic product (GDP) contributions are largest. These include Commonwealth small states such as Antigua and Barbuda (7.2 per cent GDP loss), Maldives (6.9 per cent GDP loss) and Grenada (5.5 per cent GDP loss) (Johnson, 2020).

Now into its third wave in some parts of the world, COVID-19 has forced governments to again close borders, suspend flights and call most non-essential business activities to a halt. As a result, global GDP, at the time of writing, is projected to decline by −3.5 per cent, with millions of jobs lost in the process (IMF, 2021). In Europe, for example, a major tourist source market for many Commonwealth small states, restrictions on recreational activities and entertainment have already been reinstated. Though necessary, this second round of containment measures is likely to deepen economic damage, particularly in the tourism sector. One-third of the workforce in small tourism-dependent nations is employed in tourism, which provides a vital source of income from both informal and formal enterprises (Burton, 2020). Additionally, small states' governments depend heavily on the sector, not only for foreign exchange but also for revenues generated through taxes on tourism-related income, through imports of tourism-related goods and ancillary services.

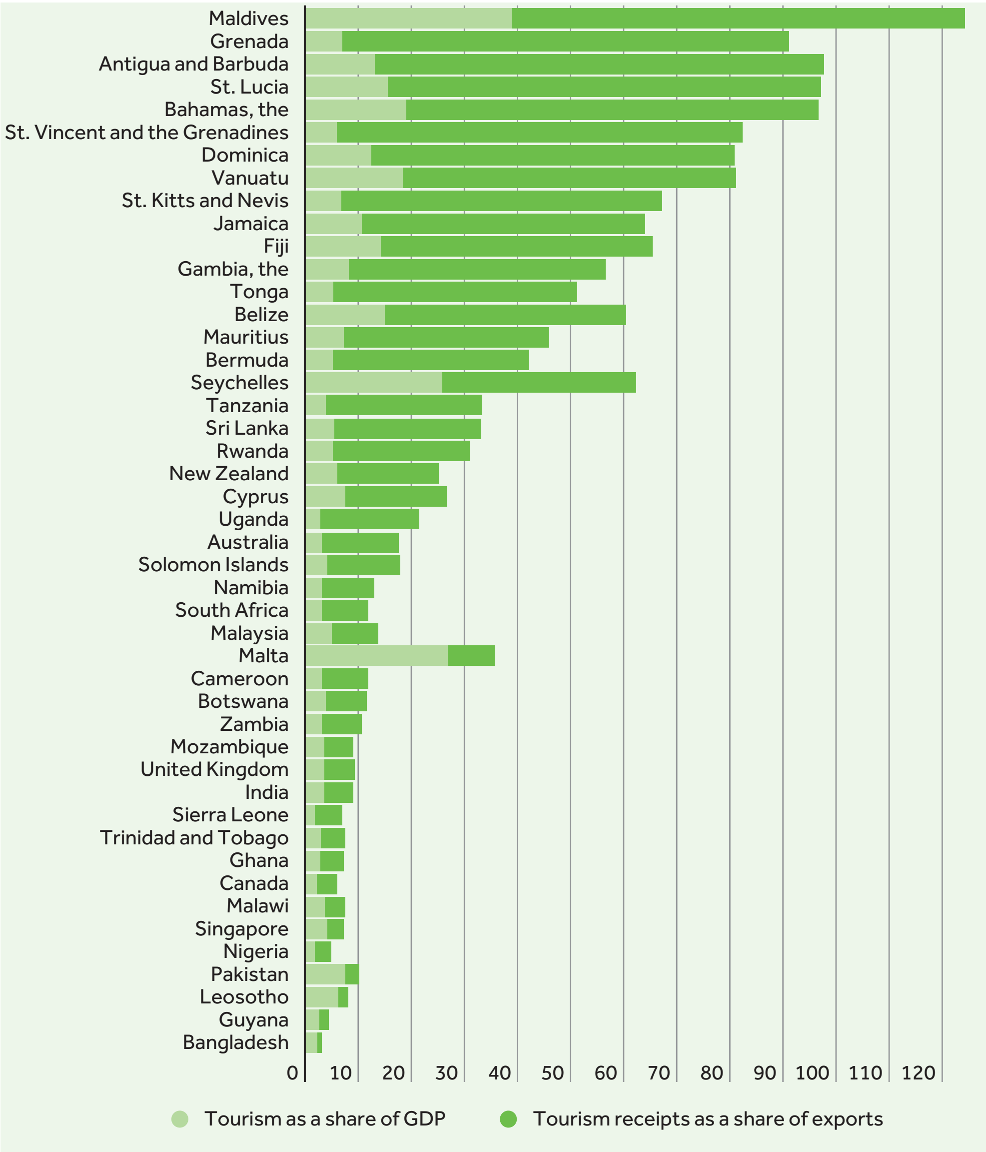
Unfortunately, standard policy tools (such as fiscal and monetary policy) may not be enough to overcome the decline in tourism, which calls for policies aimed at stimulating tourism demand and restoring traveller confidence—the success of which depends on the situation in source markets for tourism. The international financial institutions (IFIs), while providing crucial liquidity, are also not armed with enough financial capital to completely stem the sector's losses. All hopes are now squarely placed on a COVID-19 vaccine; this is on its way but it too is unlikely to arrest, at least in the short term, the contraction in tourism which is now predicted to rebound to pre-COVID levels in 2.5 to 4 years (UNWTO, 2021). For instance, there is already much uncertainty over vaccine uptake, which means that tourism-dependent countries – and particularly small states - will have to continue to explore new and innovative means to resuscitate the tourism industry. It may also take a while for the vaccine to reach most small states, which could hamper tourist-related sectors.

In an attempt to advise tourism-dependent governments, this paper first briefly reviews the importance of the sector to small developing countries. It then looks at the impact of COVID-19 on international tourism, livelihoods and other business activity to enable an understanding of the current challenges facing small states. Finally, after drawing on evidence from past tourism shocks, such as the SARS epidemic and the 9–11 terrorist attacks in the USA, and following a review of current policy initiatives in tourism destinations to tackle the sector's decline, it outlines a set of recommendations for resuscitating the tourism sector in the short, medium and long term.

2. The Importance of Tourism in Commonwealth Small States

Small states[1] receive upwards of millions of overnight guests per year. For instance, it is estimated that, as of 2019, the Caribbean saw 26.3 million international tourist arrivals in 2019 and generated US$ 35 billion in international tourism receipts (UNWTO, 2021). This reflects the situation for tourism in many small states, where its contribution to total GDP can be over 30 percent (World Development Indicators), for example in countries like Antigua and Barbuda, Maldives and Dominica (Figure 1).

Figure 1. Economic contribution of tourism in selected Commonwealth states



Source: World Development Indicators

1 The Commonwealth defines small states as countries with populations of 1.5 million and under. There are 32 Small States in the Commonwealth spanning Asia, Africa, the Caribbean, Europe and the Pacific.

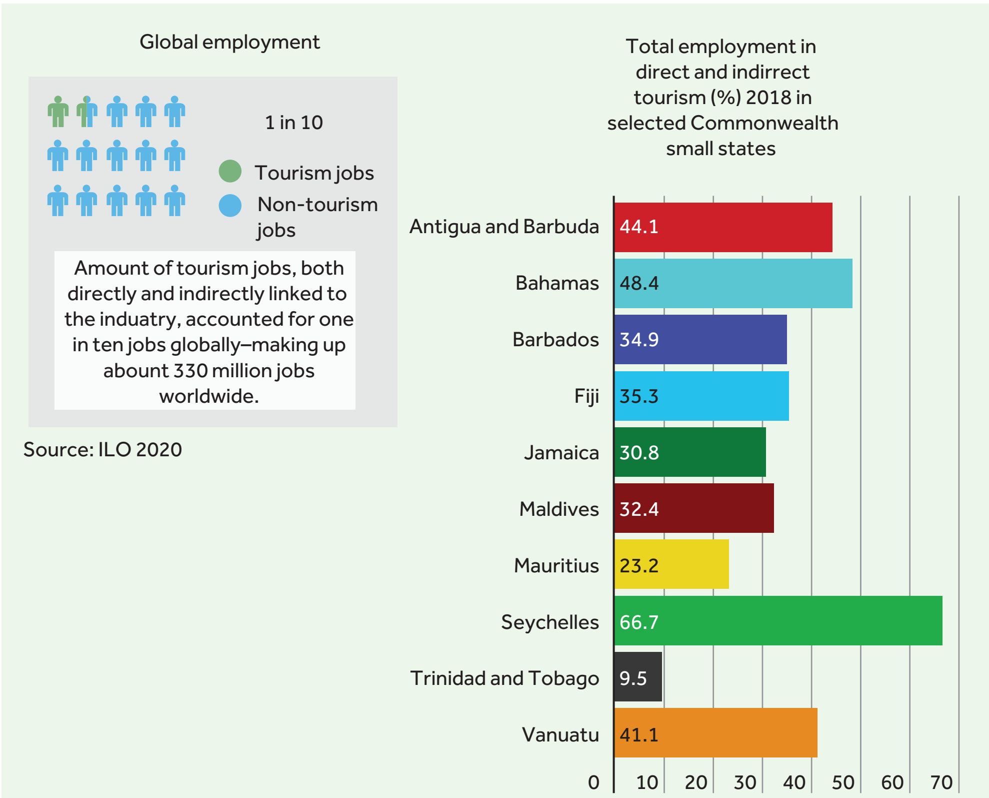
In small states, tourism is one of the most, if not the most, important sources of foreign exchange earnings and government revenue. The sector generates land rents and revenues from green, service and departure taxes, all of which deliver much-needed fiscal space. In countries like Maldives, which is almost entirely dependent on tourism, tax revenues from tourism activity make up 39.8 per cent of the government's total tax intake (Maldives Ministry of Tourism, 2018). Tourism tax revenues thus play a critical role in supporting small states' development programmes and policies. Revenue receipts from tourism are also vital to maintain healthy balance of payments positions (CDB, 2018).

In 2019, tourism jobs, both directly and indirectly linked to the industry, accounted for one in 10 jobs globally – or about 330 million jobs worldwide. For every tourism job, nearly 1.5 additional jobs are linked indirectly to tourism. For many small states, employment in tourism, both direct and indirect, accounts for 10–66 percent of total employment (Figure 2) (WTTC, 2020; ILO, 2020a). Furthermore, with women comprising up to 54 per cent of those employed globally in tourism (UNWTO, 2019), the sector also fosters women's empowerment and enhances inclusive growth.

Tourism presents numerous backward and forward linkages for many sectors, through restaurants, cafés, laundry services, cultural centres and sports facilities (Scheyvens and Russell, 2009). Tourism also provides opportunities for entrepreneurship through the participation of local tour guides and travel agencies and promotes domestic retail services. In addition to these readily observable spill-over effects, tourism provides stimulus for the agriculture sector, from which many small African states benefit (Zappino, 2005; Scheyvens and Russell, 2009). This arises from demand for food and beverages, which stimulates production and fosters agricultural development and innovation, providing income for both large-scale and smallholder farmers.

Tourism also stimulates infrastructural improvements by promoting the installation of good road and rail networks, which enhance connectivity and bring in further economic development. Furthermore, with the increased demand for foreign exchange and travel insurance

Figure 2. Tourism and employment in selected Commonwealth small states



Source: UNWTO, WTTC country reports 2019 and World Bank that comes with it, tourism also promotes financial sector development. In this effort, firms are motivated to continue innovating to provide the best available services in a competitive market.

Apart from these benefits, tourism also contributes to the policy and economic reform environment, helping facilitate small and medium enterprise (SME) development and stimulate foreign investment, as well as other sectors, like real estate, communications and finance (Christie et al., 2013). Tourism value chains can also make an important contribution to pro-poor and inclusive development through such linkages. For some countries, tourism can also support economic transformation: the sector has been central in helping countries graduate to middle-income status. This has been the case in Maldives and Samoa (World Bank, 2017). Lastly, tourism is an avenue for those in the informal unskilled sector to become services exporters through retailing craft items, tour guide services and heritage and cultural experiences (Kampel, 2020).

3. The Impact of the Covid-19 Pandemic on Tourism

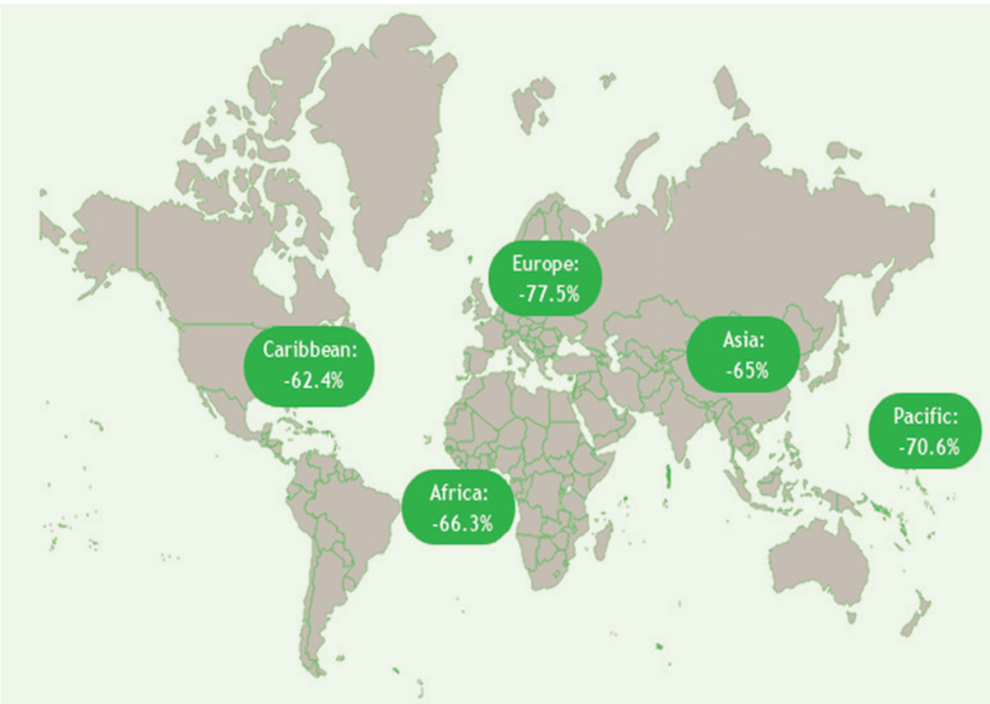
3.1 Overview of macro-level effects

As a result of the public health response and the behavioural changes required to slow transmission of the virus, service sectors reliant on face-to-face interactions, such as tourism, dining, the arts, entertainment, wholesale and retail trade, have seen large contractions (IMF, 2020a). Flight departures have decreased by roughly 80 per cent on a year-on-year basis as of May 2020, while restaurant and hotel bookings have declined by 90 and 70 per cent, respectively (MacDonald et al., 2020). In March 2020 alone, arrivals were down by 57 per cent from the same time in the previous year, equating to a loss of 64 million travellers, valued at US$80 billion in receipts (UNWTO, 2020c).

Trends indicate that the Asia-Pacific region of Commonwealth Small States has been hardest hit, as the first region to endure the spread of the pandemic, seeing a 65-70 percent decrease in arrivals between January and August 2020 (UNWTO, 2020d) (Figure 3). In this region, 63.4 million jobs lost had been lost by August 2020 and GDP has declined by US$1,041 billion (WTTC, 2020). Africa also suffered a significant (66.3 per cent) drop in arrivals during January to August, and job losses of 7.2 million, amounting to a US$52.8 million reduction in GDP (UNWTOd, 2020; WTTC, 2020). The Caribbean experienced a 62 per cent decline in arrivals (UNWTOd, 2020) and a decrease in GDP of US$26.4 billion. Concerning job losses, in relative terms the region fared worse, with 1.2 million jobs lost, reflecting a 20.9 per cent decrease in labour hours – almost double the global estimate of 11.7 per cent (UNWTOd, 2020; ILO, 2020b).

Loss of economic activity in many countries' tourism has led to sharp revenue contractions. In the Maldives, revenues have shrunk by 23.4 percent (World Bank, 2020b). In Fiji, by April 2020, tourism

Figure 3. Commonwealth small states international tourist arrivals by region, January–August 2020 (year to date % change)



Note: Not all data for all Commonwealth small states were available up until August 2020.
Source: UNWTO

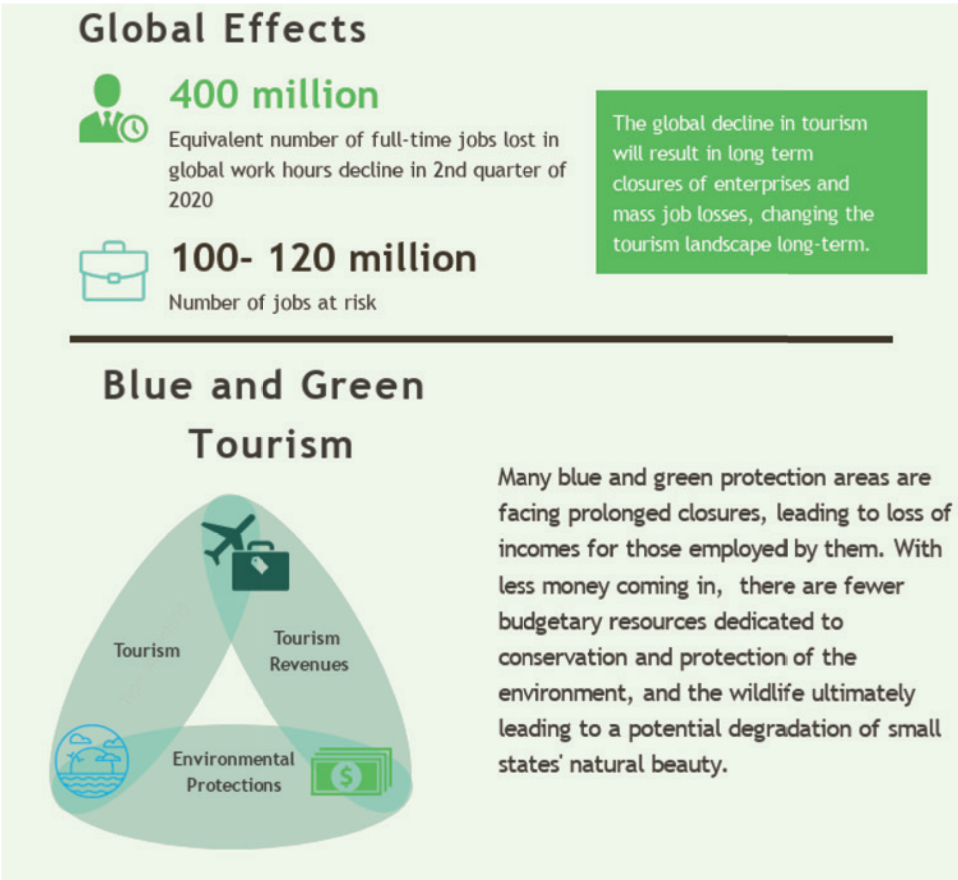
revenues had declined by 59 percent, a decrease of 17 percentage points, more than the fall observed in Fiji's non-tourism revenues (IFC, 2020).

3.2 Loss of livelihoods and costs for the blue and green economy

Decreased demand for tourism facilities has led to business closures and job losses, stripping away vital sources of income for many formal and informal workers reliant on tourism. This includes hotel employees, independent tour guides and sellers of arts and crafts. Globally, there are 100-120 million direct tourism jobs at risk (UNWTO, 2020c). Of this, accommodation and food services have been the most affected activities, with a loss of 33% and 17% working hours respectively in the second and third quarters of the year (ILO, 2021). Overall, in the first quarter of 2020, the global decline in work hours was equivalent to 155 million full-time jobs lost. This loss deepened in the second quarter of 2020, compared with the last quarter of 2019, and equated to a reduction of 400 million full-time jobs (Figure 4) (IMF, 2020a). In Fiji, 27 per cent of employees in tourism report having reduced hours/days; 25 per cent are on leave without pay; and 8 per cent have been made redundant (IFC, 2020). In Mauritius, 88 per cent of survey respondents stated that their salary had been reduced; 29 per cent were going to be laid off; and 4 per cent had already been laid off (Deloitte, 2020).

In addition to eroding households' sources of income, decreased livelihoods have implications for conservation efforts and the sustainability of the blue and green economy. This holds for African small states, in many of which tourism is driven by natural and wildlife attractions, and wildlife tourism employs up to 9.3 million people (ETN, 2020; Sebunya, 2020). As a result of COVID-19, many wildlife parks are facing prolonged closures, leading to losses of incomes for those employed and decreased demand for tour guides. With less money coming in, there are fewer budgetary

Figure 4. Effects on livelihoods and blue and green tourism



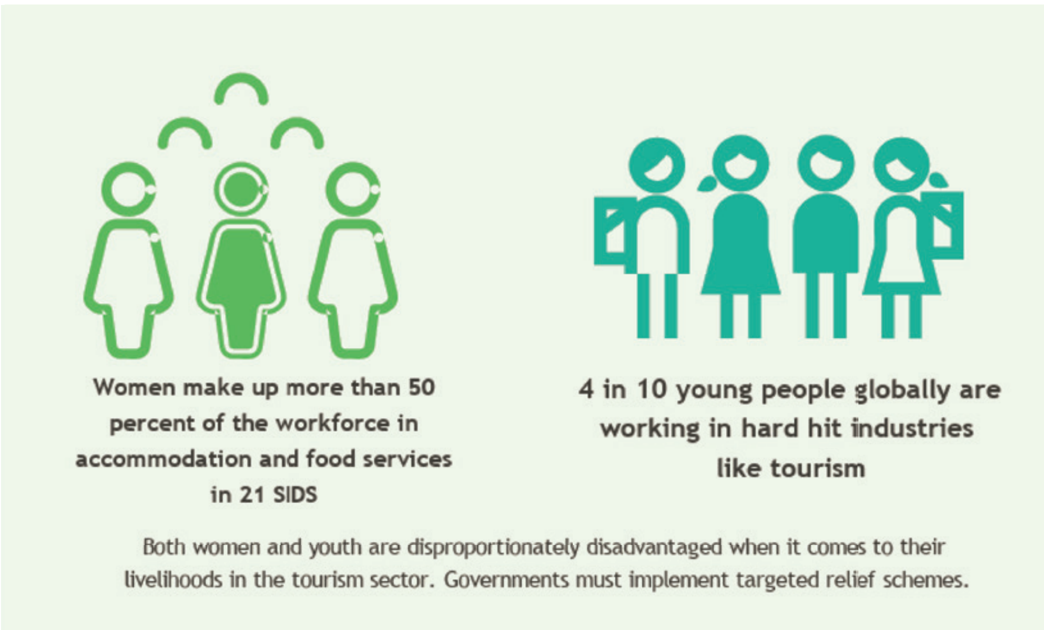
resources dedicated to conservation and less protection of the natural environment. Loss of livelihoods is also accelerating the unsustainable use of natural resources, increased incidence of poaching, for example, as households look for food and alternative income sources in the regions of Africa, Asia and Latin America (UNSDG, 2021).

For small island developing states (SIDS) in the Caribbean, Indian and Pacific Oceans, tourism is an essential provider of funding to marine protected areas and conservation efforts (IUCN, 2015). About half of all tourists choose coastal destinations, and therefore marine and coastal tourism provides SIDS with more than half of their national income (UNCTAD, 2020). Tourism activities like shark and stingray viewings provide island nations with millions in revenue each year. Fiji and Maldives, for instance, bring in more than US$38 million annually from these activities (IUCN, 2015). Ultimately, tourism not only helps bring in revenues to protect marine areas but also stimulates livelihoods grounded in the blue economy. Contributing USD 1.5 trillion to the global economy (OECD, 2016), millions of people are dependent on ocean tourism for their livelihoods. Ultimately, the COVID-related loss of revenue will not only impede environmental protections but also plunge many who work in this industry further into poverty.

3.3 Gender-based and intergenerational effects

Women have perhaps been the hardest hit by this sudden shock to international tourism. Women make up more than 50 per cent of the workforce in accommodation and food services in 21 SIDS across the Pacific, the Caribbean and Indian Oceans (UNWTO, 2020b). An estimated 42 per cent of informally employed women work in severely affected sectors such as tourism, compared with about 32 per cent of men in informal employment (IMF, 2020a) (Figure 5). Compounding this vulnerability is the fact that many of these women work in micro, small and medium enterprises (MSMEs), which are less likely to have enough capital to retain their employees. Consequently, MSMEs are impacted disproportionately. In Fiji, for example, MSMEs involved in tourism have lost seven times more income than MSMEs in non-tourism sectors (large tourism-related businesses have lost twice as much income as large businesses in non-tourism sectors) (IFC, 2020). For affected women, economic independence has been directly impacted by a loss of work in both the formal and the informal sectors (CARE International, 2020). At the same time, lockdowns are overburdening women with increased household responsibilities.

Figure 5. The gendered and intergenerational effects of the pandemic



This trend is echoed in youth populations, which are also often dependent on tourism for their livelihoods. As tourism tends to absorb those disadvantaged by the labour market and workers with limited skills levels (ILO, 2020a) youth tend to be overrepresented, working in both formal enterprises like hotels and restaurants and informal areas like local markets and handicraft stalls. A total of 178 million young workers, more than four in 10 young people globally, are working in hard-hit industries like tourism and food services (ILO, 2020c) (Figure 5). Meanwhile, aside from being overrepresented in tourism, almost 77 per cent (328 million) of young workers were working informal jobs at the start of the crisis, compared with 60 per cent of adult workers (aged 25 and above) (ILO, 2020c). As the pandemic has progressed, 42 per cent of young people have indicated a decline in their income. Their status as the youth makes their situation particularly tenuous: they are more likely to fall into poverty as a result of this crisis as they have fewer savings and assets to fall back on (OECD, 2020a).

These many challenges are leading to a substantial threat of a 'lockdown generation' of youth that will feel the ramifications of the pandemic for many years to come (ADB, 2020; ILO, 2020c). In small states that are particularly dependent on tourism, youth unemployment rates are expected to double the 2019 estimates at minimum even in a scenario where COVID-19 is contained quickly (Ibid). The effects facing youth working in tourism risk deepening already significant inequity in small developing nations.

3.4 Impacts on related sectors

Apart from contributing directly to the economy in many countries, tourism also plays an indirect role in the daily functioning of nations. This is through the presence of backward and forward linkages, or as a source of demand and supply to other sectors (Cai et al., 2006). Hence, while tourism is often a principal industry, it is also the driving force of demand for a whole slew of others, from transport to agriculture (Mensah, 2020). Because of decreased demand for travel and tourism, cultural centres have lost business, sporting activity has ground to a halt and the entertainment industry has suffered a significant blow. Decreased activity in tourism has affected catering, food, beverages and laundry services (Gössling et al., 2020).

Agriculture, transport, food and natural resource extraction (to name a few) have backward linkages to the tourism industry, as they supply its critical inputs. With the slump in demand for international and domestic tourism, sectors that provided inputs into tourism are now facing decreased demand themselves, leading to systemic weakened demand across multiple sectors. At the other end of the spectrum, decreased activity in other sectors is likely also to have adversely affected tourism, through decreased disposable income leading to decreased demand for tourism.

There is a similar slump in demand in sectors forming forward linkages. With smaller tourist inflows, sectors such as clothing, retail and food services are expected to experience a contraction in demand in the coming months (Mensah, 2020). These slumps will hit all small states differently, depending on the demographics of their domestic population and the extent and duration of the COVID-19 outbreak at source and in their main source markets. For low-income small states and those with high inequality, tourism and its related sectors will experience a large decline: the cost of tourism entities like accommodation, food and excursions have been geared towards wealthier foreign visitors, rather than the local population, making it difficult for locals to afford.

3.5 Implications for the short and medium terms

Overall, the World Tourism Organization (UNWTO) found that at the end of 2020 there were 1 billion fewer international arrivals, amounting to a US$1.3 trillion contraction in total export revenues, US$ 2 trillion in direct tourism gross domestic product (GDP), more than 2% of the world's GDP and 100 million to 120 million job losses. Consequently, global growth in 2020 is expected to recede by –4.4 per cent, whereas the value of global GDP in 2021 is projected to be just 0.6 per cent higher than in 2019 (IMF, 2020a) as a result of the protracted social distancing measures that are anticipated to continue despite a COVID-19 vaccine coming on stream. In its October 2020 report, the International Monetary Fund (IMF) suggested this would ultimately lead to a reversal of progress in poverty reduction and inequality since the 1990s (ibid.).

By the end of 2020, UNWTO projects that tourism receipts could fall by 73 per cent, with losses in tourism trade balances ranging between 2 per cent and 6 per cent of GDP (IMF, 2020a). This effect will be magnified for large net tourism exporters as they are predicted to incur greater declines in economic activity during 2020–2021 compared with pre-COVID-19 forecasts (ibid.). As such, countries like Botswana could face a decrease in GDP of up to 9.1 per cent, as COVID-19 constrains output in the country's key sectors, including the diamond industry and tourism (World Bank, 2020a). In the Gambia, accommodation and airport transfer receipts could suffer a loss of US$5.94 million, and the overall economy will potentially lose receipts of $108.5 million (0.07 per cent of GDP) from tourism if COVID-19 is not contained (UNDP, 2020).

Similarly, Caribbean countries could suffer losses ranging between US$27 billion and $44 billion from tourism losses in the best and worst-case scenarios, where tourism already contributes $59 billion a year (Lopez, 2020). Domestic demand is expected to recover faster than international demand. According to the latest UNWTO Panel of Experts survey, the overall prospects for a rebound in 2021 seem to have worsened. 50% of experts now expect a rebound to occur only in 2022 and the remaining half of respondents still see a potential rebound in 2021, mostly during the second half. The remaining half of respondents still see a potential rebound in 2021, mostly during the second half. Most experts do not to see a return to pre-pandemic levels happening before 2023 (UNWTO, 2021). Meanwhile, although Pacific countries were quick to restrict travel at the onset of the pandemic, they are likely to bear the brunt of the economic burden. Economic growth in Papua New Guinea is expected to contract to 0.8 per cent from 4.8 per cent in 2019 (ADB, 2020). Likewise, economic growth in the Solomon Islands and Vanuatu will likely contract to 1 per cent and -1 per cent, respectively, in 2020 from 2.6 per cent and 2.8 per cent in 2019 (ibid.).

SIDS are facing especially steep contractions economically because tourism provides a high proportion of their foreign earnings. The United Nations Department of Economic and Social Affairs estimates SIDS' economies to have contracted by 6.8 percent in 2020 as compared to 4.3 percent for the world economy (UNDESA, 2021). SIDS like Fiji, Samoa and Tonga are facing larger economic contractions of 12 per cent, 18.7 percent and 8 percent, respectively, as a result of their higher dependence on tourism (Vickers et al., 2020). The economies of the African small states, including Seychelles and Mauritius, are set to shrink by at least 7 percent (Maniga, 2020).

The scale of the impacts for affected countries has largely been determined by countries' proximity to the epicentres of the pandemic, as well as the extent to which their tourism source markets were adversely affected. As the pandemic endures and the epicentres switch to the Americas, Caribbean countries, in particular, will experience protracted declines in visitors, ultimately delaying the recovery process (Amaro, 2020).

4. Current Responses to the Pandemic and Lessons From Past Crises

4.1. Country responses to the pandemic

Many countries have been quick to act to minimise the effects of the pandemic on the tourism sector. Though the immediate response has varied, most policy responses have involved wage assistance and support to help resuscitate tourism demand (Box 1). Some major hotel chains have adopted flexible hours, extended paid leave, shortened work weeks, introduced job rotations and, in some cases,

Box 1. Policies implemented by various countries

In a bid to rescue the drowning tourism sector, several countries have put in place various initiatives aimed at revitalizing the sector. Most of these initiatives have been targeted at protecting tourism employees as outlined below.

- **Cyprus** approved a fund for actions to support tourism in cooperation with airlines and traveL operators, as well as actions to boost tourist demand from October 2020 to March 2021.
- **Mauritius** implemented a monthly 600 million rupee wage assistance program to assist hospitality workers (SCAP 2020) and announced that the training levy will be temporarily reduced from 1% to 0.5% for operators in the tourism sector. A similar training fee reduction has been adopted by **Singapore**.
- **Namibia** announced a wage subsidy for hardest-hit sectors and the government will provide a wage subsidy to aid businesses in retaining jobs in the tourism, hospitality, travel and aviation, and construction sectors.
- **Antigua and Barbuda** offers the Nomad Digital Residence program, launched at the end of September 2020, which allows successful applicants and their dependents to live and work in the country for up to two years an a temporary visa (Fan 2020).
- **Jamaica** and **Barbados** are also welcoming workers to live and work temporarily for up to six and twelve months respectively under expanded visa programs (Ibid).
- The **Bahamas, Barbados** and **Botswana** were fiscal policy included increased funding for income support for the self-employed; grants to assist with payroll expenses; wage subsidies; and a tourism sector stimulus for the case of Barbados. Monetary policy and macroprudential measures implemented included reducing the bank rate, providing deferred payments on credit and loan restructuring (IMF 2020).
- **Seychelles** has allocated a special fund to the Unemployment Relief Scheme.
- **Vanuatu** implemented an Employment Stabilization Payment scheme that gives employers up to 30,000 Vt (262 USD) per employee for four months (Howes and Surandiran 2020). The total expenditure of this scheme is valued at 26 million USD, the equivalent of 2.6% of the nation's GDP.
- **Samoa** and **Tonga** have topped up pensions while **Fiji** is contributing funds only if there aren't enough funds in the affected worker's account (Ibid).
- The **Solomon Islands** specifically set aside funds set aside for women's employment retention (Ibid),

offered to furlough employees (Clarke, 2020). Smaller firms, with less capital and liquidity, have not been able to be as supportive.

At the macro level, the immediate line of action for many governments has been to implement conventional fiscal bailouts, and central banks have been accommodative to help stimulate the economy. More than 144 countries have adopted fiscal and monetary measures (UNWTO, 2020b). Examples include The Bahamas, Barbados and Botswana, where fiscal policy has included increased funding for income support for the self-employed; grants to assist with payroll expenses; wage subsidies; and a tourism sector stimulus in the case of Barbados. Monetary policy and macro-prudential measures implemented have included reducing the bank rate, providing deferred payments on credit and loan restructuring (IMF, 2020c). Lessons can also be learnt from larger countries, which have implemented various tax schemes to support their economies. Canada has provided tax deferrals and postponed individual tax filing dates; Australia has implemented a tax relief package (IMF, 2020c).

Some policies are working very well. Included amongst these is Barbados' Welcome Stamp Visa, which, by the end of October 2020, had received 1,693 applications (a mix of groups and individuals), accounting for 2,796 people in total (Hosie, 2020). With a US$2,000 application fee for individuals, and $3,000 for individuals bringing their families, the visa alone is bringing in much-needed revenue that can be used for government spending. Another success is Namibia's Emergency Income Grant, which has allowed, for the first time, people who are unemployed or informally employed to receive direct financial assistance from the state (IPPR, 2020). Ultimately, as many of the policies are new or recently implemented, the measure of their true impact will be determined in the coming months.

4.2. The response by regional and international bodies

The UNWTO has played a significant role in developing advice for countries seeking to reopen, advocating for uniform travel regulations to guide the effort in the short term. The UNWTO Global Guidelines to Restart Tourism will help inform travellers on what is expected of them concerning personal protective equipment, social distancing and testing requirements during every leg of their trip. To encourage more visitors to small states that are particularly tourism-dependent, the UNWTO also suggests a temporary visa cost exemption, to create higher demand and enable ease of access. Lastly, travel restrictions and protocols should be revised regularly using the most up-to-date information from global health authorities, so that countries allow access to their tourism markets only to those from countries that have their COVID-19 outbreaks under control, while ensuring the health and safety of their domestic population (UNWTO, 2020a).

The UNWTO also recommended that private sector companies establish internal COVID-19 taskforces (UNWTO, 2020a). Following this suggestion, multi-stakeholder tourism recovery task forces were established in small states like Antigua and Barbuda and Jamaica (Baptiste, 2020; Jamaica, Observer 2020). These were tasked with monitoring and evaluating the implementation and execution of health protocols and service delivery.

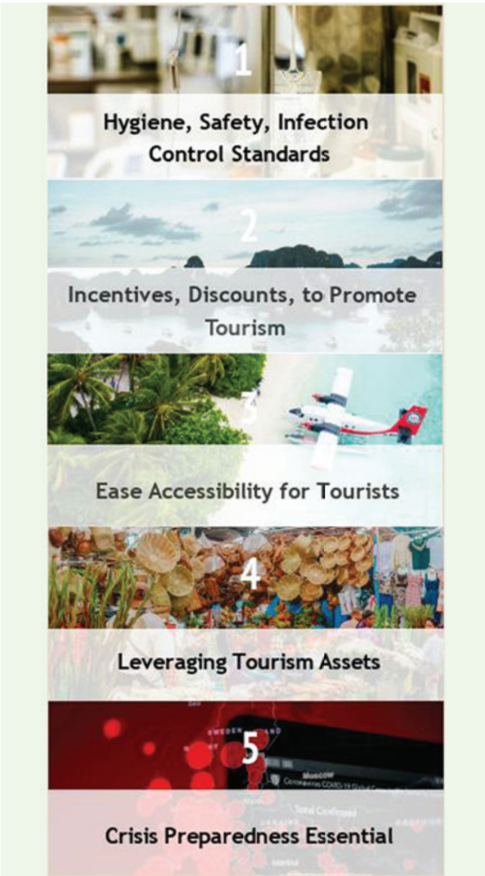
The World Bank has allocated funding to support the emergency response in affected countries. It has also provided support to social protection programmes as well as mental health support to help countries deal with the psychological losses arising as a result of lockdowns and job losses (World Bank, 2020c). The IMF has scaled up and accelerated its financial support to protect the most vulnerable in addition to providing policy advice, capacity development and debt relief for the poorest countries (IMF, 2020b).

4.3. Lessons to be learnt from past pandemics and crises

Important lessons can be drawn from past crises such as the 9/11 attacks and the SARS and Ebola pandemics, which had large impacts on tourism. Although these crises had different elements to the COVID-19 pandemic, they generated a common phenomenon of a diminished desire to travel, and countries had to come up with solutions to stimulate demand, much as they will today.

The 2014 Ebola epidemic had negative implications for travel and tourism across the African continent. The World Travel & Tourism Council (WTTC) earmarked crisis preparedness as one of its three priorities and collaborated with the World Economic

Figure 6. Lessons learnt from past pandemics and crises



Forum and the World Health Organization to map out a way forward for Ebola-affected countries (WTTC, 2018). Countries themselves responded in various ways to revitalise their tourism industries. For instance, hotels in The Gambia introduced incentives by discounting hotel rates by up to 20 per cent, and airlines provided subsidised seats (Novelli et al., 2018). The government also agreed to a reduction in landing charges to ease pressure on local businesses involved in tourism. Sierra Leone's tourism revival strategy involved re-launching media campaigns aimed at tourists (Government of Sierra Leone, 2015).

Lessons from the SARS epidemic for the COVID-19 response include the need to implement hygiene, infection and control standards to minimise risks of further disease spread and to explore options to leverage tourism assets (Dalberg, 2020). For instance, during SARS, Hong Kong converted empty hotel rooms into offices for rent, and hotels offered food delivery services to utilise kitchen staff and provided cleaning services using housekeeping workers. Rather than letting tourism infrastructure sit stagnantly and fall into disrepair, small states can adapt it to a multitude of alternative uses that will allow revenue to come in while they wait for tourism to rebound.

After the 9/11 attacks, many countries opted to ease accessibility for tourists. One such measure that could be introduced in small states was the lowering of regulatory barriers for international visitors (Bonham et al., 2006), making it easier for them to visit. One lesson from 9/11 is that, in resuscitating the tourism industry, it is important not to make travel more strenuous. In the USA, the harsher security screening processes introduced post-9/11 have made the country a less attractive destination for tourists (Baker, 2014). Meanwhile, Singapore introduced visa waiver agreements with over 150 countries, which saw its travel recover quickly from external terrorist shocks (Edmonds and Mak, 2006).

In the face of crisis, it is also imperative that countries be proactive rather than reactive, by having contingency and disaster risk recovery plans and establishing risk management protocols (Misrahi, 2016). Some Caribbean countries have been able to adapt existing crisis response mechanisms and lessons learnt from recurrent natural disasters and climatic events to put in place mitigation measures for the COVID-19 pandemic (Kampel, 2020). Ultimately, the better-prepared countries are for disaster and pandemics the more quickly they can recover, incurring fewer damages.

5. Policy Recommendations for Building Back Better

The crisis highlighted the need to reshape the structure of the tourism economies; and a revamped value chain approach, including harmonized safety and health protocols, along with innovative and digital solutions, could indeed lead to more resilience, competitiveness, a more conducive business environment for MSMEs and reduction of leakages.

5.1. Short-term recommendations

Restoring tourism and traveller confidence

To resuscitate their tourism industries and restore traveller confidence, governments must enhance the implementation of guidelines and standards outlining the minimum safety and hygienic requirements for businesses. While there has been progress on a vaccine, COVID-19 infection numbers are still fluctuating and there is uncertainty on how such a vaccine will be rolled out. As such, efforts towards safeguarding the health of travellers and employees in the tourism industry must continue. Regular and strict enforcement of safety guidelines is vital, and there must be collaborative efforts to ensure efficacy. This calls for bilateral, regional and international cooperation to set standards that must be adhered to if international travel and tourism is to rebound safely for all stakeholders. These efforts will complement the existing testing, monitoring and contact tracing that is already in place in many countries.

To encourage a revival of travel in the short term, travel corridors, or 'bubbles', should be implemented. Bubbles would allow movement between two (or more) countries based on a mutually agreed set of public health mitigation measures, such as testing before arrival or quarantining on arrival (Helble and Fink, 2020). Bubbles could be arranged with neighbouring countries that have similar rates of COVID-19 but also between countries with major business ties. Once bilateral bubbles are successfully in place, they can be progressively expanded into regional travel bubbles. This measure will help reinvigorate tourism beyond domestic markets in a controlled and ethical manner, allowing for shorter quarantine times and increased confidence in travel. A few countries have implemented travel bubbles and some are currently negotiating them, including Australia–New Zealand (the Trans-Tasman bubble) and Malaysia–Singapore (ibid.). Fiji, Australia and New Zealand are also in talks for a 'Bula Bubble', where travel will be contained to geographically isolated resorts in Fiji and tourists must present a COVID-19-free certificate and are required to quarantine for 14 days.

Providing financial support to the most vulnerable

Scaling-up of fiscal support and bailout packages remains crucial to help prevent further job losses, particularly for MSMEs. MSMEs have borne a large share of the costs associated with COVID-19-induced lockdowns and make up a significant portion of the tourism sector in small states. Vickers et al. (2020) suggest that liquidity support for such enterprises be provided at both national and multilateral levels. This could prevent local populations from falling into poverty and MSMEs from falling into complete dissolution (UNESCAP, 2020). These efforts could be supplemented by rent and tax holidays or extensions, as implemented in St Kitts and Nevis, which introduced temporary exemptions and extensions for payment of corporate income tax to support business survival (St Kitts & Nevis Observer, 2020). In addition, public-private partnerships (PPPs) could be explored to strengthen small-scale tourism and investment in tourism infrastructure and facilities.

To protect those who have already lost their jobs and sources of livelihoods, there is a need to increase funding for safety nets and social support programmes. Governments should also put in place programmes to support workers with skills development. Effective implementation for this is contingent on proper targeting of the most affected and vulnerable as well as having well-designed social protection strategies in place. As women are often more heavily employed in tourism enterprises in general, and make up most of the lower-skilled workers, targeted policies are needed to remedy the disproportionate effects on them (Zarrillli and Aydiner-Avser, 2020). Direct income support alongside cash transfers is key for those who are self-employed and those in the informal sector since many of this group have seen steep declines in their income as a result of the protracted lockdown measures. To address the growing youth unemployment crisis, governments must work to implement large-scale and targeted responses that include wage subsidies and public employment programmes (ILO and ADB, 2020). These welfare programmes mustn't be solely linked to formal employment, as that would leave a lot of young people still unprotected and underserved. To free up funds for these programmes, countries could divert funds towards crisis mitigation efforts to stabilise livelihoods (IMF, 2020a).

Investing in domestic tourism

Increasing marketing for domestic tourism could provide the quick gains needed to keep the tourism sector afloat, as domestic tourism is more likely to quickly rebound than international tourism (OECD, 2020a). This effort can also circumvent the seasonal nature of tourism: international tourism could be promoted in the high season and with more domestic-focused and price-sensitive options offered in the low season (UNWTO, 2020a). Governments could introduce voucher schemes to their citizens, encouraging them to stay at local hotels or other hospitality and tourism entities. Additionally, governments could reduce the VAT on domestic flights and other tourism services to make them more affordable. Digital marketing, along with physical advertisements for less connected populations, is imperative to the success of domestic tourism. For example, in Fiji, the Love Our Locals campaign introduced post-COVID-19 encourages Fijians to rally behind local restaurants, tour operators and hotels, and buy Fijian-made products, all while enjoying holidays domestically (ibid.). It has boosted hotel room occupancy and is being credited with the return of over 200 staff members at one resort (Tuimaisala, 2020). However, in some small states, domestic tourism may be limited and would have to be deployed alongside other measures, such as travel bubbles and COVID-19 immunity passports (Kampel, 2020).

5.2. Medium-term recommendations

Stimulating demand

Going further, efforts will need to be put in place to restore cross border travel and traveller confidence to stimulate demand. The safe restart of international travel requires that countries ensure that measures

Figure 7. Short-term policy recommendations

affecting international traffic are risk-based, evidence-based, coherent, proportionate and time-limited, in line with WHO guidance; there be harmonization and coordination of risk assessment criteria such as is the case of the European Union colour coded system; and harmonization and digitalization of protocols and documents related to international travel either these relates to testing or vaccination. Some countries are employing apps such as COVIDPASS, which indicates that a traveller is COVID-19 negative. This acts as a digital health passport using blockchain technology (Broom, 2020). Travel insurance will also play a bigger role. Using these tools, travellers will be able to book their trips with increased confidence even in the presence of ever-changing travel corridors and quarantine restrictions. In essence, countries must strive to boost competitiveness and build resilience in their tourism industry. This entails facilitating innovations and safety and health measures and protocols.

To capture a greater amount of the market, countries must look into offering remote working visas. A great deal of the global population is now working from home for the foreseeable future, and many people may be amenable to the idea of working remotely from a scenic location. Small states poised to fill this need, such as Antigua and Barbuda, Barbados and Jamaica, are rolling out long-term visas (six months to two years) allowing people to live and work remotely on the island (Hosie, 2020). To further incentivise people to visit and work long term, countries should consider offering discounted hotel rates for long-term stays as well as discounted flights. A final consideration is retrofitting some tourism establishments to better suit co-working needs to foster a long-term sustainable commitment to welcoming digital nomads into the larger tourism realm.

Protecting local businesses

Initiatives should also focus on increasing the local content in foreign-owned tourism enterprises. The current activity standstill should be used to increase the incorporation of local infrastructure, products, entrepreneurs and skills in the tourism industry to help make the whole economy more resilient (Zarrilli and Aydiner-Avser, 2020). Foreign-owned operations should look to incorporate more domestic production into their supply chains, to integrate local crafts, produce and supplies into their products. Governments have a role to play in actively cultivating socioeconomic linkages and networks throughout the tourism value chain to avoid leakage and to retain tourism revenues (Kampel, 2020). These initiatives must incorporate a gender perspective and strive to include local women producers and craftswomen in the revamping of products. This may need to be

Figure 8. Medium-term policy recommendations

accompanied by overarching support measures to assist local suppliers to meet the standards and requirements imposed by foreign-owned tourism enterprises.

This pause also provides an opportunity to retrain tourism workers so they have options to go into other ventures, on the assumption that many enterprises could be permanently closed. Education and training programmes, provided jointly by the public and private sectors, should be put in place for workers displaced from the tourism industry to enhance their competencies, allowing them more mobility in terms of livelihood options. For instance, in Vanuatu, one of the hardest-hit Pacific SIDS, where the pandemic has wiped out tens of thousands of jobs, one resort owner has converted the land next to the resort into a farm rather than new accommodation (Graue, 2020). This retained resort employees while waiting for tourists to return and, in the process, created fresh produce for the resort and the surrounding area. Ultimately, for small states looking to expand livelihood options outside of tourism, it is important to note that livelihoods of the past, such as subsistence farming, are just as important now as they were before. Small states need not reinvent the wheel but look to what they have been doing for centuries, working on ways to monetise this and integrate it better into their economies and their tourism products at large. Additionally, due to social distancing concerns, education and re-skilling must also focus on digitization and training employees in SMEs on the use of digital technologies such as touchless options for tourism facilities. Ultimately, to accomplish this there is a need to enhance the digital capacities of SMEs and provide adequate support for them.

5.3. Long-term recommendations

Transformation of the tourism and health sectors

To build more resilient tourism industries, countries and regions must invest in transforming their tourism and health sectors so they can withstand any future crises. This entails research on new business models, infrastructure development and digitisation. As we move towards more advanced technologies, countries should consider touchless options in airports, border immigration facilities and hotel check-in that limit the spread of diseases (OECD, 2020). Countries need to scale up their medical infrastructure and put in place world-class testing facilities. This will help control future pandemics, thus protecting the tourism industry.

For countries that rely solely on tourism, research needs to be conducted into alternatives to the sector. Diversification at the same time as the maintenance of tourism activity will help protect these countries from future challenges. Such diversification would not happen overnight: some countries that are heavily reliant on tourism have very few natural resources and little production capacity, while also being vulnerable to climate change (World Bank, 2020d). Hence, feasibility studies would have to be conducted on viable alternatives or supplements to tourism and on the capacity to pursue these. To support this diversification, countries would need to explore the determinants of productivity at the micro (firm) and macro levels and examine how, under the right conditions, resources can be shifted from one sector to another. One country undertaking the initial steps of diversifying post-COVID-19 is Thailand, whose services sector, which includes tourism, accounts for 58.6 per cent of GDP (Nordea, 2020). Moving forward, the country is looking to expand its industry sector via increased foreign direct investment (The Business Times, 2020). Countries could also look into developing rural accommodation options to broaden the options available for tourists, as many may move towards traveling to less densely populated areas for health concerns.

Scaling-up of marketing

Long-run efforts to stimulate demand for tourism must focus on making travel easy, safe, and efficient. One such tool would be the establishment of regional visas for the Pacific, the Caribbean and Africa, along the lines of Europe's Schengen Visa. Enhancing regional infrastructure will also enhance the ease with which travellers can move between countries, thus helping spread tourist flows in these regions. This will lead to more people travelling to multiple countries on a single trip as opposed to visiting only a single destination before returning home. In creating better connectivity between small states, countries will be more inclined to work together to promote their collective success as a tourism destination.

Moving forward, countries should invest universally in the concept of 'global access', or a global trusted traveller programme. Rather than emphasising 'country of origin', there should be an individual-centric system based on metrics of health and security risk factors (Misrahi, 2016). Such a system would enable 'low-risk' passengers to travel in an expedited way across borders while enhancing global security standards through better inter-governmental cooperation. In assessing travellers as individuals against a set of universally agreed-upon metrics related to health and security, more people will be able to travel safely while countries endure various waves of dealing with the virus. This measure would require regional and ultimately global collaboration on deciding what factors make for a 'trusted' traveller.

One way for countries to differentiate themselves both regionally and globally is via further investment in the hosting of festivals and engaging in cultural exchange (Ali et al., 2018). While many countries already do this, to create a distinct and positive image abroad, countries should increase investment in hosting festivals and activities that can be publicised for tourists. This, in turn, will offer countries a unique selling point to differentiate them from others. Alternately, engaging in cultural exchange activities can help improve the image of a country and help it stand out abroad. Cultural exchange can take a myriad of forms, such as creating movies to be screened at international film festivals or sending representatives to travel abroad and participate in events that allow them to exhibit their culture, such as dance competitions.

Figure 9. Long-term policy recommendations

The role of technology

Countries must harness new opportunities for enhancing the use of technology in tourism. These include virtual and augmented reality, transporting individuals to far-away escapes from the comfort of their surroundings, while paying for the experience at a fraction of the cost. While virtual reality technologies make it possible to digitally transport customers to virtual recreation, augmented realities involve augmenting a person's real surroundings and not replacing them. These could also serve as a marketing tool to inspire travellers to visit countries in person.

Robotics and Artificial Intelligence could also play a significant role in the future of tourism, allowing the streamlining of travel and accommodation booking and security processes such as airport security checks. Small developing countries with limited resources and technological development should look to use PPPs to develop the technology necessary to provide a conducive environment for travel technology companies that can help rebuild the tourism sector.

Lastly, virtual tourism expos could help stimulate demand for tourism. In August 2020, Mauritius hosted for the very first time a 3D Virtual Tourism Exhibition. This allowed representatives of the Mauritius travel industry, such as hotels, tour operators and attraction representatives, to host virtual stands and meet, interact and conduct meetings with key outbound travel professionals and travel agents and potential customers (Travel Daily News, 2020). Countries could explore the possibility of staging virtual tourism expos to attract tourists and promote virtual tourism options.

5.4 Potential limitations and the role of the Commonwealth

The effective implementation of the policies suggested above is contingent on several factors, some of which are beyond the control of small states and will likely affect the speed of their recovery. Some of these limiting factors are outlined below:

- Many small states have inadequate financial capacity and fiscal space to implement some of these policies. As such, small states should call on the IFIs as well as development finance institutions (DFIs) to support their recovery efforts and recognise their unique vulnerabilities (Kampel, 2020). The IFIs must also expand the scope for the provision of development assistance to include middle-income small states that have limited access to development financing based on their income status. Developing countries also need to explore all viable alternative forms of financing, including PPPs, diaspora bonds and blue and green bonds, to help ensure a sustainable recovery.
- Many small states are burdened with inadequate technological capacity to implement some of the much-needed technological innovations to support the tourism sector. This calls for increased investment by DFIs and the private sector alike in supporting infrastructure and research and innovation on how best to adapt some of these new initiatives to suit these economies. The IFIs also have an important role to play by channelling investment to new digital technologies supporting tourism.
- The recovery of many small states' tourism industries is also dependent on the actions of the countries around them, particularly those of their major tourist source markets. In essence, recovery for many small states depends on their source markets' success in containing the virus and resuming travel in and stimulating demand for tourism in small states. Advanced economies are among the top source markets for Commonwealth small states. The top three source markets for the Pacific region are Australia (28 per cent), New Zealand (21 per cent) and the USA (10 per cent) (IMF, 2020a). The Caribbean region is less diversified, with close to 50 per cent of tourists coming from the USA. This is followed by Canada (16 per cent) and Europe (15 per cent) (Acevedo et al., 2017). While many regions rely on tourist arrivals from advanced economies, Africa is witnessing a shift from traditional source markets to the BRICS countries (Brazil, Russia, India, China and South Africa). Effectiveness in controlling COVID-19 in these source markets is a large factor in the recovery of small states' tourism.
- The promotion of domestic tourism is likely to be more effective for middle-income small states like Trinidad and Tobago, Botswana and Mauritius, where citizens have higher incomes and where there are more accessible modes of transport to facilitate domestic tourism. For archipelagic SIDS such as Solomon Islands, Kiribati and Vanuatu, it will be harder to address the challenges to their tourism industries created by COVID-19 via less restrictive domestic lockdowns, as the domestic populations have fewer means of travel.

The Commonwealth Secretariat, through its various programmes and projects, is committed to supporting Commonwealth small states in their recovery process. The expansion of the Disaster Risk Finance portal provides an opportunity for countries to easily access disaster funds for both natural disasters and events like pandemics and epidemics. By providing countries with a one-stop shop on international funding, the portal aids countries in easily obtaining financing and also providing a base for learning and exchange when it comes to resources, events and trainings regarding disasters. The Secretariat is also committed to supporting Commonwealth member countries with evidence-based policy advice to help them resuscitate their economies. Ultimately moving forward tourism must be included in national, regional and global economic emergency relief packages for the sector to withstand the enduring effects of the pandemic in small states. Furthermore, small states must ensure the sustainability of their tourism sectors, in the long run, to ensure resilience to the future risks of climate change, epidemics and pandemics and natural disasters.

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Annex 1. List of Small States

Asia: Brunei Darussalam The Maldives	*Africa:* Botswana Gambia Lesotho Mauritius Namibia Seychelles Rwanda
Europe: Cyprus Malta	
The Pacific: Fiji Islands Kiribati Nauru Papua New Guinea Samoa Solomon Islands Tonga Tuvalu Vanuatu	*The Caribbean:* Antigua and Barbuda The Bahamas Barbados Belize Dominica Grenada Guyana Jamaica St Kitts and Nevis St Lucia St Vincent and the Grenadines Trinidad and Tobago

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