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KEY POINTS

- A set of harmonized industry-wide health and safety protocols can support the recovery of the travel and tourism sector in Asia and the Pacific from the coronavirus disease (COVID-19) pandemic.

- Harmonized health and safety guidelines can be adapted across different operating environments and with different levels of transmission risk—high versus limited transmission.

- Restarting travel and tourism in the region should consider the entire travel ecosystem—from aviation to small and medium-sized enterprises. This will help ensure that health and safety measures are applied and adhered to across the traveler's journey and that smaller businesses are not left behind.

- Wearing face masks, effective handwashing, regular and hygienic surface cleaning, and physical distancing—along with the approved procedures and products—form the basis of expert-informed health and safety protocols.

- COVID-19 will have a lasting effect, yet the pandemic offers an opportunity to rebuild and strengthen the travel and tourism sector.

Reopening Borders to Revive the Economy and Resume Travel in Asia and the Pacific: Health-Focused Policy Recommendations

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INTRODUCTION

The coronavirus disease (COVID-19) pandemic severely disrupted travel and tourism, and recovery is now expected to be slower than previously anticipated. Reviving the sector requires collaboration and coordinated action across the entire travel and tourism ecosystem.

Globally, the pandemic brought extraordinary losses around the world—more than half a million lives claimed, millions unemployed, and hundreds of millions more at risk of unemployment and soaring poverty.

Travel and tourism are tightly interconnected with the economic well-being in Asia and the Pacific, accounting for as much as 50% of the gross domestic product (GDP) of some countries.[1] However, in the pandemic's wake, the travel and tourism industry has been crippled. According to the World Tourism Organization (UNWTO), at the height of the crisis, every country worldwide imposed at least some travel restrictions—a historic first.[2] Since the outbreak, air travel in Asia and the Pacific has fallen sharply and many airports, hotels, resorts, and travel destinations have remained closed. Travel-related job and revenue losses in the region have been staggering.

As the outbreak continues to claim lives and grow in many parts of the world—with health experts warning of additional waves—the industry faces an uphill battle. As borders reopen, countries in the Asia and Pacific region seek guidance in restarting and supporting the sector, with a greater focus on health and safety.

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[1] International Monetary Fund. 2020. *Tourism Tracker, Asia and Pacific Edition.* https://www.imf.org/~/media/Files/Countries/ResRep/pis-region/tourism-tracker/june-2020-tourism-tracker.ashx?la=en.

[2] World Tourism Organization. 2020. *COVID-19 Related Travel Restrictions: A Global Review for Tourism.* https://www.unwto.org/news/covid-19-travel-restrictions.

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Within this context, the Asian Development Bank (ADB)—in collaboration with the International Civil Aviation Organization (ICAO), the International Air Transport Association (IATA), the Pacific Asia Travel Association, and other stakeholders—engaged a panel of leading experts from travel and tourism, global health, and academia to create a set of post-COVID-19 health-focused travel policy recommendations.

The objective was twofold. First, it aimed to bring together the broad range of stakeholders involved in a traveler's journey—from the private sector (e.g., airlines, airplane manufacturers, and tourism and travel industry partners) to public entities (e.g., airport authorities and ministries of home affairs, finance, and transport)— to address the lack of a coordinated, harmonized approach to restore travel and tourism. Second, it aimed to support industry stakeholders to adopt a common set of post-pandemic health and safety measures to accelerate recovery in the region.

This policy brief assesses COVID-19's impact on travel and tourism in Asia and the Pacific and outlines a set of expert-reviewed policy recommendations that can help countries prioritize actions to reopen the sector. The brief:

1. provides an overview of the impact of COVID-19 across the travel and tourism industry;
2. summarizes current efforts supporting the sector in response, recovery, and resiliency; and

3. outlines a set of prioritized actions to help travel and tourism stakeholders and government leaders reopen the sectors safely during various phases of the pandemic.

## IMPACT OF COVID-19 ON TRAVEL AND TOURISM IN ASIA AND THE PACIFIC

Overview

The COVID-19-induced paralysis of the tourism sector is affecting the livelihoods of millions. The Asian Development Outlook 2020 reported that tourism-driven economies—including the Cook Islands, Fiji, Palau, Samoa, and Vanuatu—would be the hardest hit by the COVID-19 pandemic. Asia and the Pacific stands to lose approximately 69 million jobs and $1.1 trillion in GDP—more than any other region in the world (Figure 1).

Airlines and Hotels (Hospitality Sector)

Airlines, hotels, and tour operators suffer from a fall in traveler demand, cancellations, and a drop in future bookings. Many airlines in the region (e.g., in India, Sri Lanka, and Thailand) are in survival mode and will see large revenue drops even as restrictions are lifted.[3] IATA highlighted that the air transport industry in Asia and the Pacific is expected to register losses totaling $29 billion in 2020, the largest of all the regions.[4] Hotels are also in crisis and have experienced sharp declines in occupancy rates, up to 60% in some countries.[5]

Figure 1: Travel and Tourism Job and Gross Domestic Product Loss Projections by Region
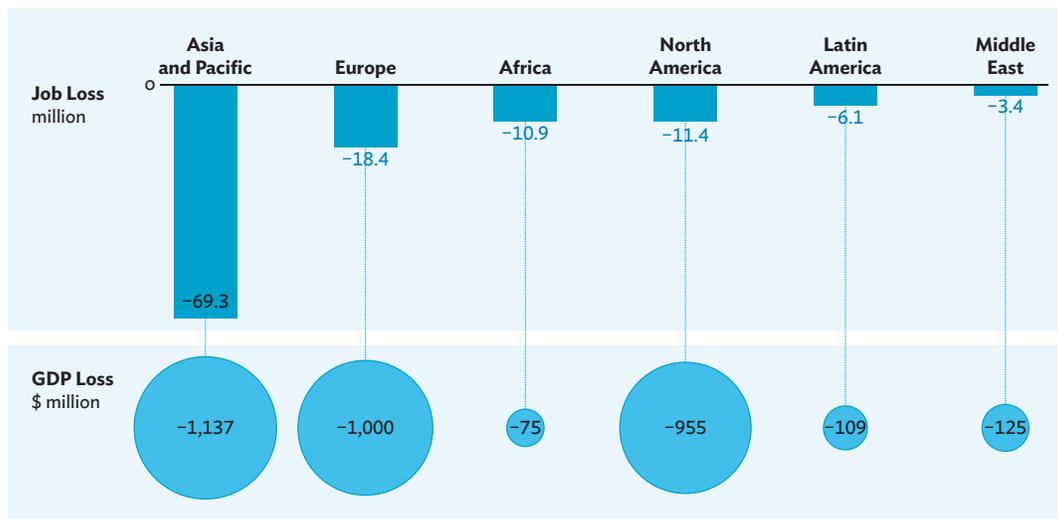
GDP = gross domestic product.
Source: World Travel and Tourism Council (WTTC). 2020. *Research Note: Travel & Tourism Recovery Scenarios 2020 and Economic Impact from COVID-19*. London.

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4   International Air Transport Association. 2020. *Economic Performance of the Airline Industry*. https://www.iata.org/en/iata-repository/publications/ economic-reports/airline-industry-economic-performance-june-2020-report/.
5   HVS. 2020. *HVS: COVID-19 Impact on Hotels in Asia Pacific*. https://www.hvs.com/article/8768-hvs-covid-19-impact-on-hotels-in-asia-pacific.

Micro, Small and Medium Enterprises and the Informal Sector

Micro, small and medium enterprises employ and provide services to millions of people and account for up to 50% of employment in travel and tourism across Asia and the Pacific.[6] A significant number of workers in informal jobs have experienced a loss of livelihood, disruption to education and health services, and food scarcity.[7] Informal workers—often the poorest and most vulnerable in society—and those employed by small and medium businesses are particularly vulnerable to COVID-19 because of factors including the lack of social protection, inability to work remotely, lack of access to health care, and not having alternative sources of income or income replacement.

To address the impact of COVID-19 and the millions of livelihoods still under threat, efforts to shape a collective response have been undertaken and are highlighted as follows.

BUILDING A COLLECTIVE RESPONSE TO THE CRISIS

The travel and tourism industry intersects with the interests of multiple sectors and stakeholders (Figure 2). Similarly, measures to accelerate recovery in travel and tourism in the region have required a comprehensive approach—ranging from fiscal and social protection support to the development of global protocols to ensure the health and safety of both travelers and the workforce.

Governments

Governments within the region responded swiftly to the crisis through wide-ranging efforts, including introducing fiscal stimulus and monetary packages with tourism-specific measures (e.g., offering tax relief), promoting job retention, and preparing tourism recovery plans.

Countries such as the Lao People's Democratic Republic, Malaysia, Palau, and the Republic of Korea have deferred tax payments for small travel and tourism businesses, while Singapore has reduced airport fees. Other government interventions include Fiji's new hotel investment incentive package, Cambodia's refresher training and reskilling for retrenched workers, and Bangladesh's formation of a crisis management committee for the tourism industry.[8]

International Organizations

ADB has allocated a portion of its $20 billion comprehensive COVID-19 response package to respond to requests from its developing member countries for guidance about how to restart travel. ADB convened a panel of leading experts from academia, government, global health organizations, travel and tourism, and technology to craft a set of post-COVID-19 pandemic policy recommendations to help the travel and tourism industry in the Asia and Pacific region recover more quickly and safely.

ICAO established the Council Aviation Recovery Task Force to respond to the need for aligned guidance around air travel for governments and industry stakeholders. Council Aviation Recovery

Figure 2: The Travel Ecosystem—The Traveler's Journey

Home
• Ground transportation
• Public transportation

Airport | Departure
• Airport authority
• Airlines
• Ministry of Transport
• Ministry of Home Affairs
• Ministry of Finance
• Ministry of Health (Port Health)

Airport | Arrival
• Airport authority
• Airlines
• Ministry of Transport
• Ministry of Home Affairs
• Ministry of Finance
• Ministry of Health (Port Health)
• Customs and declarations

Ground Transport
• Public transportation
• Rideshares

Hotels, Resorts, Restaurants, and Tour Operators

Source: Asian Development Bank.

6   Asia-Pacific Economic Cooperation Policy Support Unit. 2016. *Tourist Arrivals and Inclusive Growth*. https://www.apec.org/Publications/2016/08/Tourist-Arrivals-and-Inclusive-Growth.
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8   World Tourism Organization. 2020. *UNWTO Briefing Note – Tourism and COVID-19, Issue 1 – How Are Countries Supporting Tourism Recovery?* https://www.e-unwto.org/doi/book/10.18111/9789284421893.

Task Force recently published its "Take-Off framework" with recommendations to guide the international air transport system in its recovery and build air travel confidence.

The UNWTO has also produced a global action plan focused on key priorities to mitigate the socio-economic impact of COVID-19 and support jobs and economies through tourism. The plan includes 23 actionable recommendations, covering three broad areas: (i) managing the crisis and mitigating its impact, (ii) providing stimulus and accelerating recovery, and (iii) preparing for the future. UNWTO also released Global Guidelines to Restart Tourism, an action plan focused on priorities for industry recovery.

Travel and Tourism Industry

Airlines, airports, hotels, and airplane manufacturers have taken measures to restore traveler confidence and stimulate travel demand, including the development and application of: (i) new health protocols for safe travel, (ii) information and digital contract tracing apps for visitors, (iii) enhanced cleaning and sanitation procedures, and (iv) new technologies (e.g., air filtration systems).

In addition, IATA and Airports Council International (ACI) developed a joint approach for restarting the aviation industry that includes measures spanning a traveler's entire journey to minimize the risk of transmission of COVID-19, while the World Travel and Tourism Council published a set of Safe Travels protocols to harmonize private sector standards across different industries, including aviation, hospitality, retail, tour operation, car rental, and insurance.

EXPERT-INFORMED TRAVEL POLICY RECOMMENDATIONS

This section highlights health-focused policy recommendations experts agree as priority interventions for reopening travel and tourism safely, securely, and effectively.

Why were these recommendations developed?

These recommendations are meant to drive policy harmonization to promote health and safety across the travel industry in the COVID-19 era. Drawing on health and industry expertise, incorporating health considerations into travel-related protocols, and applying a systematic and transparent process to prioritize interventions using the Delphi methodology, these recommendations aim to bring coherence to an unprecedented

and rapidly evolving situation.[9] They are intended to promote health and safety, encourage best practice, reduce incoherence, and complement existing efforts.

How were the recommendations selected?

The initial policy recommendations were developed by reviewing emerging World Health Organization (WHO) guidance and other protocols related to reopening tourism and travel, focusing on guidelines for restoring international and domestic air travel and maintaining health and safety in the hotel and hospitality industry. These include guidance from WHO, World Travel and Tourism Council, UNWTO, ICAO, industry-specific organizations (IATA, ACI, etc.), and other sources.

An initial list of 275 action items was synthesized from the review and reduced to 25 priority recommendations through individual consultations with leading global health experts and travel industry leaders (e.g., plane manufacturers, airlines, public health experts, and hotels). Travel and tourism sector experts including representatives of international organizations, academics, industry leaders, and other stakeholders were invited to participate in a Delphi process to reach a consensus on the policies that should be included and prioritized in the final list of recommendations. The list of participants in the Delphi technique and expert panel are provided at the end of this brief.

All stakeholders were invited to a virtual meeting to discuss the results of the first Delphi questionnaire of 25 recommendations, after which two recommendations were dropped and three new recommendations were added. A second questionnaire was circulated to stakeholders who voted again, resulting in a final list of 22 recommendations, 8 of which were agreed upon in both rounds of the Delphi questionnaire and deemed as priorities for reviving and recovering travel and tourism in Asia and the Pacific as shown in the table.

How can the recommendations be applied?

A flexible menu of evidence-based and expert-validated policy recommendations has been provided to guide travel and tourism stakeholders and support the sector's reactivation. Stakeholders can select recommendations that best fit their context and are technically and financially feasible, depending on their respective countries, the demand for travel, human and financial resources, and legal and capacity constraints.

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[9] The Delphi process generally consists of a series of sequential questionnaires that seeks to get a consensus among a group of experts. This involved sending the list of recommendations to stakeholders who voted on the relative importance of each on a 5-point Likert scale—from 1 "not at all important" to 5 "absolutely essential." Recommendations where at least 80% of stakeholders agreed were either "very important" (4) or "absolutely essential" (5) to reviving travel and tourism in Asia and the Pacific remained on the list. A recommendation was dropped when less than 50% of stakeholders agreed that it was either "very important" or "absolutely essential." In the first round, 37 stakeholders responded to the questionnaire.

Health-Focused Travel Policy Recommendations

		Who	Phase Emergency	Phase Restart	Phase Recovery
STRENGTHENING MANAGEMENT AND PLANNING					
1	**Develop communications plans for public health emergencies**	ALL STAKEHOLDERS	✓	✓	✓
2	**Train and update employees on new heath policies and guidance (such as physical distancing and mask wearing) regularly**	ALL STAKEHOLDERS	✓	✓	✓
3	**Maintain an adequate supply of task appropriate personal protection equipment for employees**	ALL STAKEHOLDERS	✓	✓	✓
4	Harmonize, coordinate, and update health screening and sanitation standards across the travel eco-system (e.g., quarantine restrictions).	ALL STAKEHOLDERS	✓	✓	✓
5	Collect and share data to facilitate contract tracing in advance of and during travel and across all stages (e.g., with hotels, airlines, transportation providers, and tour companies)	HOTELS AND AIRLINES	✓	✓	✓
6	Maintain clear, consistent, and enhanced communication with customers and employees on new health and hygiene safety protocols, both digitally and physically	ALL STAKEHOLDERS	✓	✓	✓
7	Harmonize health protection and sanitation considerations for employees	ALL STAKEHOLDERS	✓	✓	
8	Establish a crisis coordination team to harmonize actions and responses related to public health emergencies	ALL STAKEHOLDERS	✓		
9	Engage with insurance providers (health and travel) to build consumer confidence	ALL STAKEHOLDERS	✓	✓	
ENHANCING TRANSMISSION BARRIERS					
10	**All employees wear face masks and other personal protective equipment (PPE), as appropriate**	ALL STAKEHOLDERS	✓	✓	
11	**Minimize touchpoints by integrating technologies to enable automation, touchless, and contactless services across the travelers' journey**	ALL STAKEHOLDERS	✓	✓	✓
12	Travelers purchase and wear face masks and/or other PPE in situations where physical distancing cannot be maintained (e.g., in flight)	ALL STAKEHOLDERS	✓	✓	
13	Modify customer flow of movement to take into account physical distancing where possible	ALL STAKEHOLDERS	✓		
14	Consider temporarily removing or restricting access to high-risk areas in facilities (e.g., water fountains and play areas) in an acute phase of a public health emergency	ALL STAKEHOLDERS	✓		
ENHANCED SANITATION					
15	**Adopt enhanced cleaning and sanitation procedures (for travelers, at airports and hotels, on planes, buses, etc.), with a focus on high-frequency touch points across the traveler journey**	ALL STAKEHOLDERS	✓		
16	Increase the use of air conditioning and effective filtration systems to keep air clean, improve air flow, reduce recirculation, and increase the fresh-air exchange.	ALL STAKEHOLDERS	✓	✓	✓
17	Develop waste management procedures for PPEs	ALL STAKEHOLDERS	✓		

continued

		Who	Phase		
			Emergency	Restart	Recovery
PUBLIC HEALTH SCREENING					
18	**Ensure companies monitor employees for fever, cough, shortness of breath, or other symptoms of COVID-19 and, if symptomatic, encourage them to stay at home, notify work, and not return to work until cleared to do**	ALL STAKEHOLDERS	✓	✓	✓
19	**Standardize COVID-19 testing (e.g., either on arrival or departure and type of test) and/or health documentation and incorporate into passenger process as soon as an effective test, validated by the medical community, has been developed**	AIRLINES/AIRPORTS	✓	✓	✓
20	During transit/transfer of passengers, utilize "one stop-security arrangements" for security and health screening thereby eliminating a queuing point in the journey	AIRLINES/AIRPORTS		✓	✓
21	Implement non-intrusive temperature screening at entry points	ALL STAKEHOLDERS	✓		
22	Deploy medical professionals onsite at the airport for health screening (e.g., spotting symptoms or assisting passengers with symptoms)	AIRLINES/AIRPORTS	✓		

Notes:

1. In implementing health measures, all parties shall treat travelers with respect for their dignity, human rights and fundamental freedoms, and minimize any discomfort or distress associated with such measures, in line with the International Health Regulations (WHO, IHR 2005).
2. Recommendations in bold are prioritized interventions based on the Delphi process.

Sources:

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World Health Organization. 2016. *International Health Regulations (2005) Third Edition.*

World Travel and Tourism Council. 2020. *Leading Global Protocols for the New Normal - May 2020.*

Who can use the recommendations?

Unless otherwise noted, these recommendations are intended for use by industry stakeholders across the travel ecosystem—including governments, airports, airlines, hotel and hospitality, retail, tour operators, and transport companies.

How were the recommendations organized?

The recommendations were classified into four categories: (i) strengthening management and planning, (ii) introducing transmission barriers, (iii) enhancing sanitation, and (iv) promoting health screening.

They assume the phased approach in reopening travel, recognizing that some actions are urgent, while others may not be possible in the short term. This aims to ensure continuity while recognizing that transition back to earlier phases may be required in line with the disease's trajectory.

The Phased Approach

1. **Emergency:** Disease still in acute phase as determined by local health authorities. Limited travel. Necessary to address urgent needs.
2. **Restart:** Downward trajectory of disease transmission as determined by local health authorities. Countries reopen and travel is gradually restarted. Risk mitigation measures in place.
3. **Recovery:** Disease has been sufficiently contained as determined by local health authorities. Risk mitigation and preparedness measures to be sustainably implemented.

Source: Asian Development Bank.

MOVING FORWARD

Key stakeholders from across the travel and tourism ecosystem—from government to the private sector—have taken vital steps to restart the industry and facilitate its recovery.

Through ongoing dialogue focusing on multisectoral collaboration, targeted supportive actions should continue to evolve as the COVID-19 pandemic unfolds. This might include the development of programs to support industry in adopting and adapting new protocols or investments in advanced technologies and/or digital solutions designed to improve efficiency and safety. While some of the recommendations may be phased out once the pandemic subsides, others may improve efficiencies and resilience in the industry and lead to sustainable change.

With unprecedented and evolving health- and travel-related implications, the long-term impact of the COVID-19 pandemic on the industry remains. However, ADB is firmly committed to helping governments speed up COVID-19 response and recovery and is currently working with countries in Asia and the Pacific to implement the recommendations identified in this report to effectively allow travel and tourism to rebound.

LIST OF PARTICIPANTS—DELPHI TECHNIQUE AND EXPERT PANEL

The table on the right contains the list of participants who provided feedback on interventions, participated in the experts' meeting, and/or participated in the Delphi questionnaire survey.

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3	Tetsuya Takahashi	Central Japan International Airport Co. Ltd.
4	Izumi Tatsuya	Narita International Airport Corporation
5	Ashida Takanori	Narita International Airport Corporation
6	Moon-Young Park	Incheon International Airport Corporation
7	Tyron Lam	Samoa Airport Authority
8	Eugene Gan	Changi Airports International
9	Peter Wiesner	Bangkok Airways
10	Marisa Pongpattanapun	Bangkok Airways
11	Dan Freeman	Boeing
12	Ben Johnston	Air New Zealand
13	Vinoop Goel	International Air Transport Association (IATA)
14	Subhas Menon	Association of Asia Pacific Airlines
15	Shaenaz Voss	Fiji Airways
16	Willem Niemeijer	Yaana Ventures
17	Celia Brennan	Intrepid Travel
18	Suyin Lee	Discova/Flight Centre
19	Jackson Pek	Amadeus IT Group
20	Ho Ren Yung	Banyan Tree Hotels & Resorts
21	Jakob Helgen	Marriott International, Inc.
22	Victor Paterno	7-Eleven Philippines
23	Ansa Jordaan	International Civil Aviation Organization (ICAO)
24	Arun Mishra	International Civil Aviation Organization (ICAO)
25	Martin Taylor	WHO Office for the Western Pacific (WPRO)
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34	Subhas Menon	Association of Asia Pacific Airlines

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ADB is committed to achieving a prosperous, inclusive, resilient, and sustainable Asia and the Pacific, while sustaining its efforts to eradicate extreme poverty. Established in 1966, it is owned by 68 members—49 from the region. Its main instruments for helping its developing member countries are policy dialogue, loans, equity investments, guarantees, grants, and technical assistance.

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