Global Shift in the Tourism Industry Policy Before and After the COVID-19 Pandemic

By

HAM, Seung yeon

CAPSTONE PROJECT

Submitted to

KDI School of Public Policy and Management

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GLOBAL SHIFT IN THE TOURISM INDUSTRY POLICY

EXECUTIVE SUMMARY

This paper is about comparing differences between the tourism policy, before and after the COVID-19 pandemic. By analyzing OECD policy papers from 2011 to 2021, the global trend of the tourism industry was researched.

The tourism industry was affected heavily after the advent of this pandemic in December 2019. Comparing the number of tourists before and after the COVID-19, the number of tourists decreased, which means that the tourism industry shrunk considerably. In other words, this shows how the COVID-19 pandemic changes individuals' lives enormously. This paper is composed of two parts that discuss the global shifts in the tourism industry before and after the COVID-19 pandemic.

The literature review consists of two parts, before and after the COVID-19. First, it discusses the policymakers' focus on tourism policy before the COVID-19 pandemic affected society. Here, the paper focuses on promoting tourism growth, achieving tourism competitiveness, and achieving green innovation in the tourism industry. The ways to achieve those are at local, regional, and national levels of the tourism industry. It is detectable that the role and responsibility of the central government are essential. Government funding and marketing strategies can achieve tourism growth and competitiveness. Furthermore, development at the subnational level, regions, and cities play a crucial role in tourism growth. After the pandemic, policymakers focus on tourism policy after the COVID-19 pandemic came into our lives. After the considerable impacts of the pandemic, most policymakers put attention to lessening the negative effects of COVID-19 on the tourism industry. In other words, this part presents resilience and recovery in the tourism industry, detects the benefits

of digital transformation gaps and skills, and prepares for the digital future in the tourism industry. The first step is to discuss recovery plans and then see some case studies that emphasize the digital future of tourism. Cases reveal the urgency of developing digitalization gaps to overcome challenges in the tourism industry. To develop a digital future globally, technological support and digital advancement are required from governments.

The pandemic brought us many challenges in the country's economy, at the same time, the COVID-19 pandemic was an eye-opener for preparations for future crises. This means that the pandemic gives policymakers a chance to change policies and structures in the tourism industry.

In the analysis part, policies for three countries, Korea, Canada, and the United Kingdom are researched. From these three countries, it is noticed that the government puts its effort to protect the survival of the tourism sector, restore visitor confidence in travel, and attract more visitors from both domestic and international tourists.

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1. INTRODUCTION

1.1 Background of Study

Numerous confirmed COVID-19 cases were confirmed in UK, Canada and Korea between January 2020 May 2022. In the beginning of COVID-19 pandemic (2020), people are reluctant to go outside and meet new people. Also, in the peak of the COVID-19 (Summer of 2020), even in weddings, brides and grooms cannot invite their friends, since they can only invite 49 people in Korea. From May 2022, government relaxed the regulation to wear masks outside in Korea. Some people were out of jobs, since they are working in airplanes or tourism businesses worldwide. Besides, tourism related businesses, in Korea, many restaurant owners have to close their businesses because of practicing social distancing. So that, many students who just entered the colleges, they cannot meet their professors or friends in classrooms. As mentioned above, the COVID-19 pandemic influenced people's lives profoundly and significantly. The very first case of the COVID-19 pandemic was found in December 2019 in China. After the outbreak of the pandemic, the virus spread globally rapidly. Even after two years have gone by, the pandemic is still affecting peoples' lives massively. A pandemic cannot only affect one's health issues or relationship issues but also it is threatening one's living. Not only does it affect health, but it also brings many challenges to industries, specifically, it directly impacts the cultural and creative sector.

Many areas in the cultural and creative sectors are affected by the pandemic. From 2020, it was difficult for people to spend time in museums or go to attend live concerts. Besides these activities, the tourism industry also faces massive downsizing.

1.2 Statement of the Problem

There were significant negative impacts on the tourism industry since COVID-19 broke out after March 2020. Travelers were forced to stop travel, airlines reduced flight schedules, and many of them closed. OECD (2021a) reports that it expected an 80% decline in international tourism. Furthermore, domestic tourism also declined by about 75% in OECD countries (OECD, 2021a). This means that both international and domestic tourism shrank. This impact made airlines close, and numerous workers lost their jobs. Therefore, economic impacts are tough and last longer than expected. Since the tourism industry is considered one of the critical industries that helps the labor market prosper (OECD, 2013). This means that many people make a living from this industry. Thus, resilience and recovery of the tourism industry are important. Tourism faced challenges because of the pandemic, the challenges gave policymakers a chance to rethink tourism policy. This paper will discuss the global shift in tourism industry policy before and after the COVID-19 pandemic, which is one of the sectors that suffered a considerable impact after the pandemic broke out.

Before COVID-19, policymakers paid attention to promoting tourism growth in their nation, achieving tourism competitiveness in their respective regions, and attaining green innovation in the tourism industry. However, after the COVID-19 crisis, the policymakers have to see different viewpoints. After the crisis, employment in the Cultural and Creative Sector fell by 5.5% (OECD, 2020e). Thus, policymakers need to focus on the resilience and recovery of the tourism industry and use this crisis as a chance to move towards the digital future of tourism by filling the gaps and skills in digital transformation.

In the 21st Century, the tourism industry gives people more chances to visit other countries, and experience other cultures and food. This industry leads many people to be

employed as pilots, guides, hoteliers, flight attendants, and so on. This means a prosper in the economy. Also, the growth of the economy is slow, the tourism industry still has made its growth in its economies (OECD, 2017b). In other words, the tourism industry policy affects visitors, people living in the tourism destination, and governments.

Tourism industry policy has much influence on the government and people. Several government officials and cultural workers are working in the tourism industry category. Therefore, a global shift in tourism industry policy is significant.

1.3 Research Question

a. What are the tourism policies before and after the COVID-19 pandemic?

b. What is the global shift of the tourism industry policy with the COVID-19 pandemic?

2. LITERATURE REVIEW

2.1 Before COVID-19

Before the emergence of the COVID-19 pandemic, policymakers paid attention to how to enhance and enlarge the tourism industry. Since the tourism industry was a vital source of economic growth; this is considered very crucially (Duperyras & MacCallum, 2013). In this section, policymakers focus on promoting tourism growth, achieving tourism competitiveness, and attaining green innovation in the tourism sector.

2.1.1 Promotion of Tourism Growth

The tourism industry provides a considerable economic impact; it consists of about 21% of service exports in OECD countries (Haxton, 2015). Although several global financial crises have been experienced in the world economy, the tourism industry stayed firm because of retirement, short break, and holidays, which became the primary tourism growth source (Haxton, 2015). Besides, visitors would like to enjoy their time most luxuriously. Therefore, many travelers desire to enjoy a staycation globally.

To have growth in the tourism industry, government-level intervention was required for the most. This is given to tourism businesses gain supports from governments. Then, the impacts continued and expanded in the industry. For instance, New Zealand used leverage legacy opportunities to enlarge the long-lasting effects of COVID-19. This leads to attaining positive results such as a high return on investment. Another example is from the United Kingdom, that the visitors' spending in visited countries. 109.8 million GBP was spent by 1.3

million visitors in the U.K. (OECD, 2017b). As a result, this shows that launching events

promotes economic growth, one of the goals of the tourism industry.

The tourism industry expands with events using marketing and promotion methods,

which brings economic impacts. Furthermore, people in the 21st century would like to enjoy

their lives by joining programs and participating in events. Sometimes, fancy leisure

activities were chosen related to events. For example, Austria developed programs in the

tourism sector named Creative Austria. This worked as a tool to distribute creative scenes in

Austria, also used in international events (OECD, 2014). Figure 1 describes tourism intensity

in Austria from 2014 to 2015. In detail, red denotes traveling more, and blue denotes tourists

traveling less. The number of tourists varies within a nation, as depicted with the i.maps from

Statistics Austria. This demonstrates that variation happens within a country because of
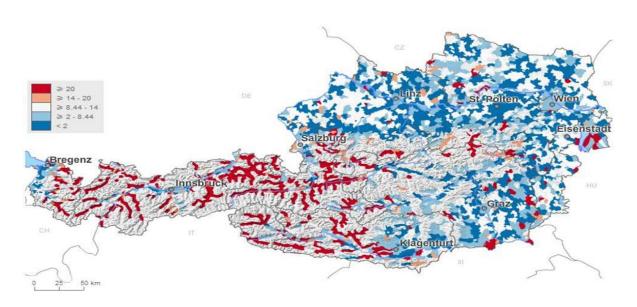
marketing and promotion (OECD, 2016).

Figure 1. Tourism Intensity in Austria (2014-2015)

Sources: Statistics Austria. An OECD Review of Statistical Initiatives Measuring Tourism at

Subnational Level

Countries apply different strategies to attract numerous tourists. A lot of examples reveal how other countries develop event strategies. For instance, Denmark hosts various promotional events to make many travelers visit Denmark. As a result, it has become a host country to hold significant sports events, and this is done by a national organization, Sport Event Denmark. The country launched more than 250 sports events worldwide. As a result, Denmark holds more sports events and has become the host city of global events (OECD, 2017b). This displays Denmark's strategies to attract tourists by holding sports events.

Besides sporting events from Denmark, the United Kingdom launched a new program to promote a new tourism experience, aiming to reach its exports by 2020 (OECD, 2017b). Thus, the UK created the GREAT campaign, branding a country that gained funds from the government in 2012, which raised global citizens' attention to encourage more visitors to come to the United Kingdom (OECD, 2017a). This saw the United Kingdom establish VisitBritain in 2014, with financial support from the public and private sectors (OECD, 2017a; OECD, 2017b).

In addition, the German National Tourist Board (GNTB) in Germany also utilized a marketing strategy to advertise to people to come to Germany and deliver a positive image of Germany (OECD, 2017b). Efforts of the GNTB work on behalf of the government ministry, which means that majority of the fund is from the German Parliament (OECD, 2017b). This example shows that the German government promotes a country as being a favorite tourist destination.

Another case is from Portugal, which applied the European Capital of Culture (ECOC) in 2012. This event promoted growth in tourism (OECD, 2014). Due to this encouragement, about 20 to 30% of visitors gained a motivation to visit. Specifically, visitors

increased by 29%, and the number of accommodations increased by 43%. As a result, this

event helped the tourism industry to flourish (OECD, 2014). Therefore, the cases from

Austria to Portugal show different ways to encourage people to travel to these countries as
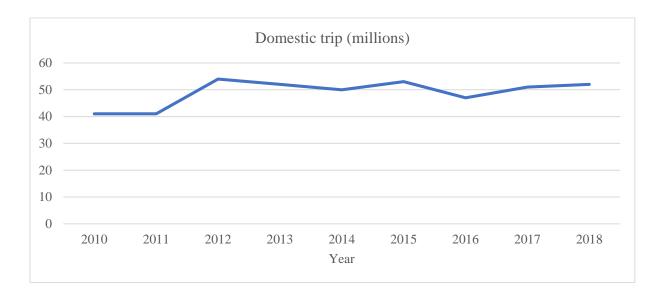
tourists.

Financial support would attain tourism growth. According to OECD (2020b),

Romania's tourism industry performance was below an OECD average in 2017. However,

this led the Romanian government firmly provide support to increase its employment in the

tourism sector. Therefore, it is noticeable from Table 1 that, the number of employees

increased by about 6% (OECD, 2020b). As a result, Romanian domestic travel increased

from 41 million to 52 million from 2014 to 2017. This reveals that growth in tourism by 29%

(OECD, 2020b). On top of domestic growth, international tourism also grows; 58% increase

in international tourism (Figure 2 and Figure 3). As demonstrated with examples,

governmental intervention in employment leads to more visitors coming, which is the

tourism growth in Romania.

Table 1. Employment Rate in Romania (2014-2017)

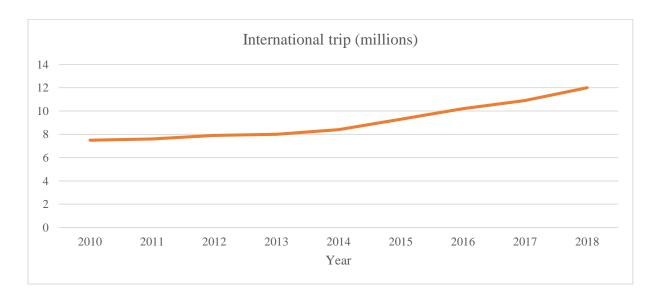| Year	2014	2015	2016	2017
employment	349,375	342,755	371,696	373,074

Source: OECD Tourism Statistics (Database).

Figure 2. Domestic Trips in Romania (2010-2018)

Source: OECD Tourism Database.

Figure 3. International Trips in Romania (2010-2018)

Source: OECD Tourism Database.

In Italy, Bank Intesa Sanpaolo provided 5 billion EUR to support the 'Pact 4.0'

program. The government supports these investment funds through the Strategic Tourism

Plan 2017-2022. Thus, Intesa Sanpaolo, the largest bank in Italy, worked as an investor in the tourism growth sector (OECD, 2018b). This example shows how the private sector and government provide financial support to promote tourism growth.

Other than country-level examples, business types are also discussed. EU provides subsidies to SMEs to start and expand businesses. EU funding source supports European business including projects in the tourism industry. For instance, the Ministry of Economic Development in Russia created microcredit to support SMEs, which focuses on cultural and creative sectors (OECD, 2017c).

Overall, before the pandemic, the government helped the tourism industry to grow. This brings an increased labor force in the tourism industry and many tourists to tourism destinations.

2.1.2 Achievement of Tourism Competitiveness

According to Duperyras and MacCallum (2013), the tourism industry provides people with jobs and economic wealth. In other words, tourism works as a source of living for many people. For instance, the tourism industry employed 9.4% of employees in 2018 (OECD, 2021c). At that time, numerous countries focus on tourism competitiveness. OECD member states agreed and finally defined tourism competitiveness as "the ability of the place to optimize its attractiveness" (Duperyras & MacCallum, 2013). This means that support from the government, quality, branding strategy, and tourism prices are necessary. Thus, the OECD created 11 core indicators to measure tourism competitiveness (Duperyras & MacCallum, 2013).

The first indicator measures the GDP of tourism. This is a solid measure that shows how much the tourism industry contributes to GDP (Duperyras & MacCallum, 2013). This

lets policymakers know how much the tourism industry contributes to the economy.

The second indicator measures tourism revenue per visitor (Duperyras & MacCallum, 2013). This measures the economic impact of tourists' economic activity. This is to have an accurate method to assess how much money is spent by visitors. This is collected by tourists, which seems to be a valid measure to check visitor revenues.

The third indicator measures overnights. This is a direct measure to see how many visitors visit sites. This measure focuses on gaining more extended stay visitors (Duperyras & MacCallum, 2013). Hence, for the overnights, the money spent by visitors for overnights becomes important to increase the visitation (OECD, 2018b).

The fourth indicator measures exports from the tourism sector (Duperyras & MacCallum, 2013). According to OECD (2014), the tourism industry has a role in opening the export markets. In Korea, in 2010, Hallyu tourism solely brought USD 1.5 billion. This shows that tourism brings many export outcomes which get competitiveness in tourism.

The fifth indicator measures labor productivity in the tourism sector. It is known that a high ratio of GDP to employees benefits a country's economy (Duperyras & MacCallum, 2013). Overall, employment in the tourism sector is measured by this indicator, one of the drivers of tourism competitiveness.

The sixth indicator uses Purchasing Power Parities (PPPs) to analyze spending in the tourism sector compared to other countries. This allowed policymakers to understand where the government is located with its price levels (Duperyras & MacCallum, 2013). As a result, this indicates a level of price competitiveness.

The seventh indicator is related to the entrance of a country. Visa issuance is one of the crucial factors when we plan to travel. From this, it is to consider that simplifying the step of visa issuance may lead to attracting more tourists to the country or safety and security

issues, so this process is crucial to look at (Duperyras & MacCallum, 2013).

The eighth indicator states that natural resources work as the attractiveness of a tourist destination. This can be one of the critical factors in choosing a destination. These would contribute to a place to have competitiveness in which visitors enjoy unique experiences with the heritage and biodiversity (Duperyras & MacCallum, 2013).

The ninth indicator discusses cultural and creative resources closely related to the tourism industry. This would be meaningful for visitors to provide long-term competitiveness in the tourism industry (Duperyras & MacCallum, 2013). For example, the Japanese government established "Cool Japan" to promote Japanese crafts (OECD, 2014). This provides a chance for visitors to pick a Japan as a destination, which brings tourism competitiveness.

The tenth is visitor satisfaction, which is helpful to know opinions from the demand side (Duperyras & MacCallum, 2013). This method helps obtain visitors' opinions and apply this to the destination. In this way, customer satisfaction would rise and lead to more visits. This would give tourist sites more competitiveness with high demands.

The last indicator is a national tourism action plan. A national strategy and action plan seek to find ways to increase tourism's economic and social benefits. This plan requires governmental intervention with active participation (Duperyras & MacCallum, 2013). For instance, the Turkish government made a national plan to understand the country more deeply. This means that plan aims to understand key trends in the tourism industry (OECD, 2018a). Romania has Romanian National Tourism Master Plan 2007-2026 which aimed to gain funds from the EU (OECD, 2020b). As a result, a national plan is crucial for a country to have tourism competitiveness.

Thus, these indicators need other support from international organizations like

Eurostat, UNWTO, ILO, OECD, and statistical data (Duperyras & MacCallum, 2013).

Besides supporting organizations, governmental support is crucial. Therefore, government-level intervention is required in most of the indicators, which is a must-have trait to achieve competitiveness in the tourism industry.

2.1.3 Green Innovation of the Tourism Industry

In the early 2010s, the OECD and many European countries aimed to solve more than just an environmental issue (OECD, 2013). This leads to green growth and green innovation. OECD (2011b) defines green growth as promoting economic growth and development by providing resources and environmental services. This action brings positive outcomes not only to the economy but also to the environment. As a result, green innovation leads to a green economy and green growth (OECD, 2013).

Nature continuously provides resources and environmental services (Stacey, 2015). Therefore, green growth would be one of the most significant contributors to the economy, and the tourism sector emphasizes green growth. Therefore, the tourism industry is one sector that impacts the economy. Also, a green future should be focused on the tourism industry.

To achieve a greener future, several drivers are discussed. For a green future, twenty-five countries surveyed the drivers of green innovation in tourism. Seventeen countries picked environmental focus, ten countries answered consumer demand, six countries picked political commitment, five countries choose business case, education, and sound innovation policy, and four picked industry cooperation (OECD, 2013a). This shows that green innovation is determined due to environmental and consumer needs. Environmental concerns and travelers' demand lead to the green ecosystem in the tourism sector.

Drivers and barriers both exist. Among twenty-seven countries, twenty-four countries

responded. Fifteen and thirteen of them reply that information gaps and investment costs are two big barriers to achieving green innovation. Others are consumer reluctance, budget constraints, industry capacity, and financial barriers (OECD, 2013a). These drivers and barriers bring motivations and cause difficulties to green innovation, other triggers are required to attain successful green innovation in the tourism sector. The main triggers are cooperation between industries, horizontal integration, and support from stakeholders (OECD, 2013a).

The support of stakeholders is essential to achieving a green and sustainable future in the tourism sector. Governments can provide support for the green growth of the tourism industry, providing funding for relevant research and reducing barriers to early-stage commercial development (OECD, 2013). For example, the Rwanda government put its efforts to achieve green growth. According to OECD (2011), Rwanda gained financial support from the government to achieve Rwanda's Vision 2020 Objectives. The Rwanda government conserved the mountain gorilla habitat. This revitalized the tourism industry and led the tourism industry to be the largest share of the national GDP (OECD, 2011b). This shows that green innovation can be achieved by the tourism industry and is done by government intervention.

Green business tools achieve green innovation, and an example is called Green Innovation Radar (GIR) (OECD, 2013). It is green business model innovation (BMI) program utilized in OECD/Nordic Innovation in tourism projects. This had dimensions to measure, including customer need, channel, process, and supply chain. GIR is used in 28 companies from various countries, including Austria and Korea. Austria's innovation can be found in Boutique Hotel Stadthalle, where there is zero energy. Another example is from Korea. COEX, the exhibition center, which becomes a famous tourism site even for domestic tourists. It has a management system to register waste, gas, water, and electricity (OECD, 2013).

These cases reveal that green innovation in tourism got support from the government and the private sector.

2.2 After COVID-19

After the COVID-19 pandemic, the tourism industry still faces numerous changes. The tourism sector has a chance to think about the future of the tourism industry which leads policymakers to emphasize different areas such as recovery from the pandemic and moving towards a digital future.

2.2.1 Resilience and Recovery from the Pandemic

OECD (2020d) reported that number of visitors are expected to decrease by about 80%. For example, the United Kingdom expects that inbound tourists will decrease by 73%, and from this, expenditure will decline by about 79%. OECD (2020c) reports that the tourism industry is one of the industries hit hardest and that this pandemic provided government officials a chance to think about the tourism industry. This means many countries look forward to having a recovery plan from COVID-19 and improving seamless travel. Therefore, OECD (2020c) constructs a seamless travel plan to enhance the satisfaction level of travelers.

Seamless travel has become a worldwide trend. An unexpected increase in disease risk, an increase in disasters and crises, the advent and advancement of digital technologies, climate change, and environmental change have entered our lives after the COVID-19 pandemic (OECD, 2020c). As such, more and more people are having difficulty engaging in tourism due to the risk of natural disasters and diseases after COVID-19. Therefore, people dream and hope for seamless travel.

Safe travel aims to ensure travelers' safety and efficiency, increase employment rates

in the tourism industry, and increase visitors traveling experience. Political interventions regarding seamless travel can be seen in many countries. Particularly, national-level interventions encourage tourists to achieve seamless travel. For example, in the case of Korea, the Ministry of Culture, Sports and Tourism (MCST) and the Ministry of Land, Infrastructure, and Transport (MLIT) signed an MoU in December 2019 (OECD, 2020c). This agreement aims to build positive experiences for tourists, which is closely connected to seamless travel. Also, in the United Kingdom, it developed the 2025 UK Border Strategy plan after the COVID-19 pandemic (OECD, 2020c). As a result, governmental interventions are required to achieve seamless travel.

After the pandemic, seamless travel is also raised as a goal achievement as a survey of G20 countries has shown (OECD, 2020c). For example, Table 2 indicates that visa issuance and transportations are the top two considerations in traveling. The tourism sector requires reliable transportation, any means of public transportation (including bikes, trains, or even vehicle rentals). Table 2 also shows that many countries answer visa issues as areas to achieve seamless travel. Digital traveler identity is another significant consideration for improving seamless travel.

Table 2. Areas to Improve Seamless Travel

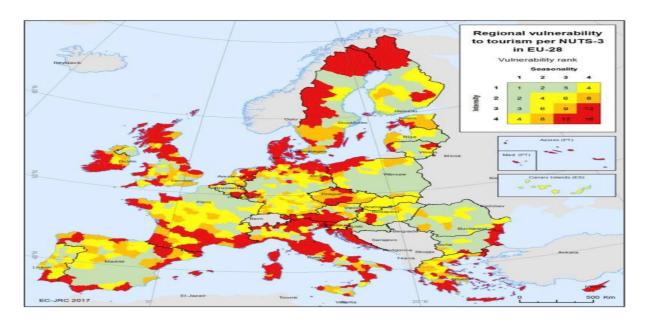|	Very important	Quite important
Visa requirements and acquisition	83	13
Digital traveller identity, biometrics, and security	70	26
Multi-modal transport and connectivity	61	35
Visitor handling, information, and management	55	32

Source: Safe and seamless travel and improved traveller experience (2020).

Some methods can be used to achieve recovery from the pandemic. For example, Helsinki, Finland, has marketing strategy changes to focus on a sustainable future with its lifestyle (OECD, 2021a). This shows that Finland's marketing strategy has its goal to achieve safe travel with digital innovation.

Another recovery is from tourism businesses. SMEs and entrepreneurs suffered a lot because of their weak preparedness compared to big corporations. OECD (2020d) claims that large businesses also faced difficulties due to travel restrictions between 2020 and 2021.

Figure 4 depicts tourism regional vulnerability in Europe. In other words, it shows where the high vulnerability of tourism is in the European Union. Specifically, red shows the region with the most vulnerability in tourism, and green denotes the least vulnerable city to choose as a tourism destination. Red areas are on the coastline, where visitors believe they are at high risk of traveling. Unlike green areas, big cities are considered safe places to travel (OECD, 2020d). This means that tourists favor green areas more than red areas. As a result, it shows the difference in the number of tourists between tourist areas and also the degree of recovery.

Figure 4. Regional Vulnerability in European Tourism Sites

Source: Mitigating the impact of COVID-19 on tourism and supporting recovery

The changes to be made in tourism destinations are done by government intervention. Korean case is that the government provides up to 90% of their annual leave allowance for six months. This helps people who are working in the tourism sector to keep their jobs. Another example is Australia's JobMaker Plan in June 2020 (OECD, 2020e). Under this plan, several funds are given to help the industry and the economy to recover. AUD 75 million was granted to the restart investment to sustain and expand (RISE) fund, which gave much help to produce tours or events (OECD, 2020e). These examples show how much the tourism industry gained support from the government.

Overall, resilience from the pandemic seems urgent. It is not only from the tourism sector but also after the COVID-19 it is necessary to have seamless travel needs to be addressed first. Then, cooperating skills to share the traveling data with real-time information.

2.2.2 Utilizing Digital Skills to Achieve Digital Transformation

Besides building resilience after the pandemic, digital technologies have become critical to reducing tourism challenges. Moreover, after the COVID-19, demands for digital skills in the tourism industry increased (OECD, 2021a). Therefore, digital technologies are highly expected and required to restart tourism globally.

Digitalization and ICT technology seem to be required in less skilled and repetitive levels of work (OECD, 2021b). Utilizing digital skills and technologies vary within OECD countries. New Zealand, Iceland, the Czech Republic, and Switzerland believe interactions between tourists and staff are necessary. Bulgaria claimed that the change takes time to progress (OECD, 2021b). These show that automation takes more comprehensive parts of the industry. Another example is utilizing Big Data, which creates visitor profiles and allows one to understand tourists' patterns and preferences (OECD, 2020c). This requires kind cooperation to share travelers' data. In Germany's case, National Access Point (NAP) has traffic data (OECD, 2020c). It is still trying to collect more data to be helpful in trip planning.

In Portugal, digital skills were absent since not many workers have skills or abilities. Although VR or AR skills are highly recommended for employers, not many have the skills (OECD, 2021c). Smaller tourism businesses have difficulties having specialists in their companies. Regarding this employment issue, France and Italy provide an opportunity to rise profile of digitalization. The government encouraged to bring small businesses to work as one amalgamation (OECD, 2021c).

Enhancing digital skills is necessary to improve the experience of tourists. Latvia's case grew digitalization skills with human resources such as tourism business managers, specialists, and professionals in digital tourism (OECD, 2021a). This needs to be enhanced with the growing digitalization.

2.2.3 Prepare for the Digital Future in the Tourism Industry

With digital technologies, the digital future becomes closer to the tourism industry. OECD (2021a) report argues that the COVID-19 pandemic accelerated the digitalization process of the world economy. Digital technology changes the working environment in the tourism industry since this raises economic and environmental strength (OECD, 2021a). Many European countries prepare a digital future after the COVID-19 pandemic. New normal brings changes and lets policymakers prepare for the digital future with fast-growing digital technology (OECD, 2021a).

The digital future has become predominant in Europe. In Portugal's case, the tourism industry in Portugal grew consistently until the pandemic became dominant in 2020 (OECD, 2021c). After the pandemic, the tourism sector decreased and faced difficulties. The biggest challenge in society is to practice social distancing. Therefore, the Portugal government developed the Digital Acceleration Strategy to achieve a digital future. Digitalized public administration and provided ICT services in public services (OECD, 2021c). From this, it shows how much government intervenes and how much people in a country benefit from its service.

They were losing inbound tourists in Portugal after the pandemic which shows that digital technology is necessary. Even jobs such as sales workers would be at high risk, but automation is necessary to have less personal contact after the pandemic. The pandemic undoubtedly accelerated automation such as online food purchasing, remote ordering menus at restaurants, and semi-automated elevators (OECD, 2021b). Some may worry and believe that digital technologies may threaten workers to be jobless. However, figure 5 shows that the correlation between automation and COVID-19 risk is not always positive. Instead, some

jobs are only at "moderate or high risk of" COVID-19 and digitalization (OECD, 2021b). In

other words, workers do not have much risk when automation begins in the workplace.

Digitalization is expected to adopt in tourism by utilizing QR codes or online booking in

varying tourism destinations (OECD, 2021b).

Figure 5. Congruence of Job Loss Risk from COVID-19 and Automation

Source: Preparing the Tourism Workforce for the Digital Future

Other than that, public transportation could also prepare for the future. The digital

future is with autonomous vehicles, useful for many travelers to tour not in a group or via

tourism companies. Expanding having driverless automobiles would positively impact

mobility within or between cities (OECD, 2020c). This is a mobile part of moving forward to

a digital future in the tourism industry. Contactless technologies practice social distancing,

which develops digitalization.

Table 3. Tourism Policies Before and After COVID-19

Before COVID-19	After COVID-19
1. Promotion on tourism growth 2. Achieve tourism competitiveness 3. Green innovation achieved by the tourism industry	1. Resilience and Recovery from the COVID-19 2. Digital skills and digital transformation 3. Prepare for the digital future with the tourism industry

Overall, Table 3 summarizes tourism policies before and after the COVID-19 pandemic. A digital future is needed after the outbreak of the pandemic. The digital future in the tourism sector came from the demand of visitors. Newly developed technologies are very much meaningful to both tourists and travel sites.

3. GOVERNMENTAL POLICIES ON THE TOURISM INDUSTRY

Tourism policies are different in each country. This paper will be looking at three different countries, Korea, Canada, and the United Kingdom.

3.1 Korea

The tourism industry provided 1.4 million jobs and brought 4.7% of GDP in the year (2018) before the COVID-19. This means there were many visitors from different countries, including travelers from the nearest countries, Japan and China (OECD, 2020a).

For example, Korea promised to take action with its tourism 2020 Strategy. The first was to ease visa rules to attract more visitors from China, Vietnam, Indonesia, and the Philippines. Also, tourism programs should include and combine cultural content such as K-pop. This strategy uses the popularity of Korean celebrities to attract the fans of Hallyu to visit Korea. Moreover, the government will increase tourism sector subsidies up to KRW 198 billion (OECD, 2020a).

The tourism promotion plan was started in 2018 by ministries, including the Ministry of Justice, Interior and Safety, Ministry of Culture, Sports and Tourism, and Ministry of Foreign Affairs, to promote tourism growth in Korea. The plan is a long-term plan until 2022 (Ministry of Culture, Sports and Tourism, n.d.).

The first strategy is to activate domestic tourism. In other words, the government strengthens the protection of domestic and foreign travelers. The second is strengthening local tourism capacity and infrastructure and discovering local-specific content. The third

goal is to be attractive to global citizens. This can be achieved by easing visa issuance and emphasizing online marketing. The fourth strategy is to establish a tourism industry innovation system and support the growth and improve the regulations of the tourism industry (Ministry of Culture, Sports and Tourism, n.d.).

Specifically, encouraging visitors from outside the country is related to the second and third strategies for international tourism. It is to foster global cultural tourism festivals in Korea. In 2018, the government plan to revise the Tourism Promotion Act to foster global festivals to be promoted. Through Big Data analysis of SNS and credit card companies, characteristics and economic effects of visiting cultural tourism festivals were derived (Ministry of Culture, Sports and Tourism, n.d.). On top of that, the government is implementing a policy to develop tourism products linked to Hallyu. By collaborating with Hallyu stars, visitors can have Korean food and cultural experiences recommended by celebrities, thereby spreading Hallyu fans to come to Korea. In addition, the concert will be commercialized as a tourism product to support marketing expenses for foreign tourists and will be promoted throughout the year. Furthermore, the government plans to produce a photo zone for Hallyu dramas and information boards in the local drama filming locations and operate a drama-related experience program to make Hallyu drama a tourist attraction. The government expects to have 110,000 Hallyu tourists in 2021 and 330,000 in 2022 (Ministry of Culture, Sports and Tourism, n.d.).

There are several ways to encourage international visitors. One is visa issuance to potential visitors. The government plans to simplify visa application documents to incentive tourism for corporate employees in East Asian countries. The plan to alleviate the side effects of non-relief is also discussed. In other words, the number of illegal stay enforcement personnel will be increased (Ministry of Culture, Sports and Tourism, n.d.).

Regarding entering the country, the government plans to expand the use of self-immigration checkpoints (Ministry of Culture, Sports and Tourism, n.d.). Another is to establish an optimized advertising strategy by using a digital platform. For example, making online advertisement films with Korean celebrities to attract potential visitors happened in June and July 2018. Furthermore, there is a need to expand the available advertisement pool, and promote exchange events for significant markets and events (Ministry of Culture, Sports and Tourism, n.d.).

Besides enhancing travelers' experience, the Ministry of Culture, Sports, and Tourism support tourism businesses. Promising tourism companies with creative business materials and innovative start-up spirit were discovered step by step, and customized support was provided. A contest for innovative tourism companies was held in 2018, and after the contest, financial support was provided for product and service development. The government also supported the companies in exclusive consulting for start-ups and commercialization. Moreover, the government established a network space such as office space and collaboration to select resident companies (Ministry of Culture, Sports and Tourism, n.d.).

After the COVID-19 pandemic, in January 2021, Korea adjusted and renewed its tourism promotion plan. Many ministries decide to collaborate to discover tourism content by theme. The Ministry of Agriculture, Food, and Rural Affairs plan to revitalize rural tourism. We plan to develop content and programs for each type suitable for the COVID-19 situation, provide discount support for rural tourism, and consider non-face-to-face rural experiences (Ministry of Culture, Sports and Tourism, n.d.).

The government created the 2020 Special Travel Week to expand participation and improve vacation culture. This plan is a continuous policy that started before the pandemic,

and its purpose was to encourage domestic tourism. For the youth, we plan to create a youth travel product, and for the middle-aged, we plan to continuously provide support for vacation expenses, and we are reviewing appropriate holiday expenses. In addition, the Ministry of Culture, Sports and Tourism, and KORAIL plan to introduce a tourist transportation pass. Further, island tourism may be one of the sites to promote (Ministry of Culture, Sports and Tourism, n.d.).

The government plans to conduct strategic international advertisements and promote exchange events. By holding these events, the government enhances the chances for international tourists to visit. Continuing from the previous plans, the Korean government establishes a digitally tailored advertising strategy and expand communication with international consumers. A plan to revitalize tourism to Korea in connection with China's major foreign policies will be prepared and a tourism cooperation system between Korea, China, and Japan will also be established. Activating East Asia tourism is also discussed. The East Asian airline network is planned to be strengthened. Despite high demand, there is an insufficient supply of airplanes, which needs to be expanded to fulfill the needs (Ministry of Culture, Sports and Tourism, n.d.).

Another plan is to continue discovering and developing innovative tourism businesses and build tourism events and services. This is expected to have increased number of international visitors to enjoy events that the government is holding. In addition, there is a need to strengthen and promote new programs to vitalize the networking between tourism businesses. This means that it would support networking programs between industry, government, academia, and resident companies in the tourism sector. As a result, it creates synergies within the sector (Ministry of Culture, Sports and Tourism, n.d.).

To sum up, it can be noted that there were continuous efforts and development with

the same goals to achieve through implementing policies before and after the COVID-19

pandemic. Furthermore, it is notable that many ministries cooperated and worked together to

achieve the same goal.

3.2 Canada

Before COVID-19, 739,700 jobs were in the tourism industry, accounting for 3.9%

of total employment. On top of that, in 2018, travel exports accounted for 26.6% of total

service exports. This shows that the tourism industry is one of the rapidly growing industries

(OECD, 2020a).

Canada has the three main goals in the tourism sector: employment for employees,

tourism offerings to visitors, and investment in the industry. To realize the goals, the

government put its efforts into the three objectives (OECD, 2020a).

The first is to attract visitors to the communities of Canada. This is done by

developing the potential tourism destination. Utilizing the Canadian Experiences Fund, worth

$58.5 million, can bring more strength to the communities of Canada. This could offer

visitors more excitement to see and do, which is what many tourists are looking for. Since

Canada has a famous cold winter season, winter sports and festivals like Ottawa's Winterlude

can attract many international visitors. Therefore, Canada expects to have more visitors in a

specific season. Indigenous tourism, with its unique and creative features, is also the identity

of Canada. This uniqueness is attracted by about one-third of tourists, mostly French, who

visit Canada (Services, 2019). The government of Canada is ready to export this authenticity.

Another is rural tourism which can create jobs and bring economic benefits to communities.

On top of that, the government believed that the nature of Canada could create economic

benefits (Services, 2019). Lastly, inclusive tourism shows openness to all, so they plan to

have LGBTQ2 tourism by showing respectfulness (OECD, 2020a).

The second objective is to establish tourism investment groups. This strengthens the ability to invest more in tourism destinations (OECD, 2021a). Development and investment in Canada are working with partners. This means that Destination Canada and other agencies work together. Government-level intervention is needed, and private and non-profit sectors were engaged (OECD, 2021a). Therefore, the government gets support from many different agencies, including Parks Canada, Canadian Heritage, and the Business Development Bank of Canada. Develop promising products and ensure consistency of investments through the federal government, Tourism Investment Group. Moreover, a new approach of having provincial and territorial partners on one table would be expected to develop new tourism projects (Services, 2019).

The third objective is a new focus on public-private collaboration. The government of Canada realizes that this collaboration refrains from the growth of the tourism industry in Canada. To overcome this issue, the government made the Economic Strategy Table for Tourism in 2017. Then, a new table comes out with the new targeted actions two years later. So, a new angle to view public-private relation is helpful in the growth of tourism. Thus, cooperation between government and industry was helpful in the growth of the tourism industry (Services, 2019).

These three indicators reveal the brief goals of the tourism sector in Canada. This suggests the goal is specified as revenue to be $128 billion (25%), 54,000 (7.3%) more jobs, and tourism GDP growth exceeding the national economic growth are the government-level goals to achieve between 2018 to 2025. Another target is to have over 1 million international visitors in the winter season, and the spending of cities to increase, especially the three largest cities (Services, 2019).

After the COVID-19 pandemic, the objectives of Canadian tourism policies are going to change. However, unfortunately, the government expects the tourism industry to recover at the latest in 2021 (2021 Tourism Recovery Plan).

The first recovery plan is government support for businesses. It is to create the Credit Availability Program, the second is to set the maximum wage subsidy program for the three periods of 75%, the third is to increase the proportion of the Canada Emergency Rent Subsidy, fourth is to provide $500 million in funds to Regional Development Agencies and the last is to provide financial aid for airlines (2021 Tourism Recovery Plan). This is similar to the plan which was to establish tourism investment groups before COVID-19. By giving financial aid, the government aims to get businesses solvent. Highly Affected Sectors Credit Availability Program (HASCAP), Regional Relief and Recovery Fund (RRRF), Canada Emergency Rent Subsidy, and Canada Emergency Wage Subsidy (CEWS) are for tourism businesses. They are all from government loans. Programs are intended to provide financial support and give business owners relief (2021 Tourism Recovery Plan).

Also, the safety issue is another point. By testing and quarantining, the pandemic reduces the worries of visitors. Financial support for COVID-19 testing leads to more visitors. Also, setting strict and stable federal guidelines let more Canadians be relieved from the pandemic (2021 Tourism Recovery Plan).

Other than that, TIAC discusses how much Canada tries to keep its competitiveness in a global world. This is developed from the plan to attract visitors from communities. Even though there was a pandemic, Canada still widens its goal to be a country that attracts many travelers all over the world. Surprisingly, Canadians spend more on international travel than most international tourists spend in Canada. Therefore, tax incentives are provided to tourism businesses, and extend work visas offered to visitors (2021 Tourism Recovery Plan).

Overall, the recovery committee of Canada comes from every sector, including the public and private. Government intervention is critical for the recovery of Canada's competitiveness.

3.3 The United Kingdom

The United Kingdom is one of the countries in which the tourism sector contributes a considerable amount to the country's economy. Moreover, before the pandemic came into our lives, tourism was one of the living sources for many employees.

In 2015, the Department for Digital, Culture, Media, and Sport (DCMS), a government institution in the United Kingdom responsible for tourism, leisure, and creative industries, announced a Five Point Plan to promote the tourism industry (Department for Digital, 2015). The U.K. reached 1 billion international tourists in 2012. Also, 1 in 10 people is employed in tourism-related work. These led the U.K. to set a Five-Point Plan (Department for Culture Media & Sport, 2015). A year later, in August 2016, the ministry updated the plan with the new name, Tourism Action Plan (OECD, n.d.). This plan consists of five priorities that continue from the previous plan (Department for Culture Media & Sport, 2016).

The first plan discusses the tourism landscape. It focuses on the tourists' experience in Britain and emphasizes experience outside of London. The government will push forward on digital since social media would work as a platform to share tourists' experiences (Department for Culture Media & Sport, 2015). Next year, the government will establish an industry strategy. Government departments give funds to promote the tourism industry in the U.K. Holding regular meetings with ministers from Wales and Scotland to get an idea to encourage more international tourists (Department for Culture Media & Sport, 2016). In addition, the government announced a £40 million Discover England Fund. This fund

encourages the building of unique tourism products or experiences. Also, it will be given to the project, which will be replicated to practice (Department for Culture Media & Sport, 2016).

The second is related to skills and jobs in tourism. In 2014, almost £ 60 billion was contributed to its economy. This means that the tourism industry grows faster than other industries, providing support to businesses such as SMEs. For this, the government tries to support businesses (Department for Culture Media & Sport, 2015). The government made its goal that 3 million apprenticeships begin work in the U.K. by 2020. Specifically, this project lets apprentices finish this training in 16 to 18 months instead of 12 months (Department for Culture Media & Sport, 2016). Moreover, the government would attract the most talented employees to the tourism industry by having positive perceptions (Department for Culture Media & Sport, 2015). In 2016, the Tourism Action planned collaborated with Careers & Enterprise Company. Furthermore, the £14.5 million budget covers the South-West ultra-band, increases digital skills, and fulfills digital gaps (Department for Culture Media & Sport, 2016).

The third is regulation which encourages and supports all businesses to grow. The UK government planned to save £10 billion more in this government by meeting the ideal condition to protect the tourism industry in 2015 (Department for Culture Media & Sport, 2015). Other than that, the government plans to allow small accommodation providers to sell small amounts of alcohol. In addition, they are modernizing and digitalizing retail export schemes to claim VAT (Department for Culture Media & Sport, 2016).

Fourth is the transportation system. The U.K. is going to increase the easiness of accessing many tourist sites. This way, the government aims for more tourists to visit outside the capital by using railways (Department for Culture Media & Sport, 2015). In the 2016

Tourism Action Plan, the government tried to develop GREAT Rail, allowing visitors to visit the most popular tourist destination and come back. This will be shared in online booking services for international visitors to access quickly. Another access to the U.K. is via airplane. In 2015, 73% of international tourists visited the U.K. via airplanes so the government will expand the South East airports. Also, in 2014, the government noticed that 5% more international visitors used the regional airports in the U.K. Thus, the government anticipates Manchester Airport will bring at least £250 million in ten years. They also expect two-thirds of new workers to be hired in new jobs (Department for Culture Media & Sport, 2016).

Fifth is a GREAT welcome, a warm greeting from the U.K. This is an easy visa process. It would reduce the burden of traveling while prohibiting illegal immigration. Therefore, they would evaluate the plan to reimburse the cost Chinese visitors already pay, especially those who book at least eight days of trips and stay at least four days outside London. Thus, the U.K. desires to maintain this competitive visa regime by having this process. This project is expected to lessen the burden on visitors in processing their visas (Department for Culture Media & Sport, 2015). For the visa fee, they limit the increase in visitor vies fees to 2% per year. Also, they increase the number of visa application centers to 15. The government will be updating the UKWI website and visa application center for international visitors to notice the changes. On top of that, they will be welcoming especially Chinese visitors. They will provide Chinese language maps and directories in more than 400 tourist destinations (Department for Culture Media & Sport, 2016).

In June 2021, the U.K. government published Tourism Recovery Plan to gain help and recover the industry from the pandemic. This plan aims to make the tourism industry resilient and sustainable to overcome the pandemic. In other words, the U.K. government has a plan to recover from the COVID-19 pandemic and build back better rapidly. These goals have short to medium and long-term goals (Department for Culture Media & Sport, 2021).

The first goal is a short to medium-term goal; its goal is to recover 2019 tourism volume and visitor spending levels swiftly. The goal by the end of 2022 is to restore annual domestic travel to £99 million per night and spend £19 billion. This goal is to gain 41 million visitors per year and, by the end of 2023, get the spending to return to £28 billion (Department for Culture Media & Sport, 2021). The second goal is a medium to a long-term goal. The tourism industry surpasses the 2019 level in both number of visitors and revenue generated, and then the government wants to share benefits across all countries and regions. It has a purpose for visitors to spend year-over-year in all regions in the U.K. for visitors and an increase in overnight stays in the off-season (Department for Culture Media & Sport, 2021). The third goal is to have more productive, novel, and resilient tourism. Using digital technology and data enhances the visitors' experience. This will allow the tourism industry to employ more employees from the U.K. (Department for Culture Media & Sport, 2021). The fourth goal is to conserve the U.K.'s heritage and minimizes environmental damage. The government wants to increase the number of visitors so that communities and businesses benefit from tourism (Department for Culture Media & Sport, 2021). The fifth goal is for the industry to be open to all, which has inclusiveness and accessibility. The government wants its country to be the most accessible tourism site globally (Department for Culture Media & Sport, 2021). The sixth goal is for the U.K. to become a leading host country to hold events. By having government ministers, the government creates more business events that would attract more international visitors (Department for Culture Media & Sport, 2021).

The British Tourist Authority leads the pandemic recovery policy plan in the U.K. The U.K. government cooperates with the country's recovery plan. According to the Department for Culture Media & Sport (2021), at least £25 billion is spent on tourism-related activities. The self-employment income support has been extended to support individuals with the fifth subsidy from May to September 2021. From June 2020 to the end of September

2021, VAT reductions for tourism and hospitality across the U.K. has decreased by 15%. Moreover, a 100% easing of business interest rates in the U.K. retail, leisure, and hospitality sectors will be implemented by June 2021. In addition, £5 billion Restart Grants will reopen tourism businesses (Department for Culture Media & Sport, 2021).

The VisitEngland and National Tourist boards made the 'We're Good to Go' COVID-19 security standards for safeness. This is adopted and utilized by more than 45,000 tourism businesses. At the end of February 2021, with the efforts of VisitBritain, 'We're Good to Go' businesses received global 'Safe Travels' stamps. March 2021, £56 million worth of fund called Welcome Back Fund was announced; this fund is for the safeness of tourists to shop and have some trips. Another Visit Britain's 'Know Before You Go' website will address Great Britain and Northern Ireland's travel rules (Department for Culture Media & Sport, 2021).

To sum up, these policies are implemented with governmental support. Moreover, the Department for Digital, Culture, Media, and Sport will be in charge of the fast recovery from the COVID-19 pandemic.

3.4 Analysis and Findings

Three countries, Korea, Canada, and the United Kingdom, are all from different continents, East Asia, North America, and Europe respectively. In 2019, 51% of visitors visited Europe, 25% visited Asia and the Pacific, and 15% visited America. In 2020, 59% Europe, 17% Americas, and 15% Asia and the Pacific (World Tourism Organization). This reveals why this paper compares three countries from different continents.

In the case of Korea, Korea has shown such progress before the pandemic. Although there was a difficult situation in 2020, performance is created through business promotion

tailored to the pandemic, such as business method change and non-face-to-face tourism. The government usually carries out projects in preparation for post-COVID-19, such as creating regional tourism infrastructure and service system innovation. In addition, online or non-face-to-face promotions were conducted to attract more tourists to come to Korea, and the promotion of tourism was shifted to a regional focus. In addition, the government would make policies that continue to foster small-scale tourism enterprises. Thus, this will support tourism in each growth stage (Ministry of Culture, Sports, and Tourism).

The Government of Canada supports the tourism industry by offering different funds to tourism businesses. At the end of 2020, the federal government recognized that continued financial support was required through 2021 and launched new measures aimed at Canada's hardest-hit industries, including support for tourism and hospitality, live events, and festival. For instance, a lifeline for airlines, and funding for regional airlines and airports gained support (2021 Tourism Recovery Plan).

In the United Kingdom, it is noted that the most prominent economic contraction in the services sector in 2020 was the tourism industry: aviation, maritime, travel agencies, rail, and entertainment. The pandemic clearly shows that 1.7 million people are employed in the tourism sector with various jobs such as hoteliers, Bed and Breakfast owners, tour guides, and travel agents. Further, about 4 million people get paid in the UK tourism sector before the pandemic. Therefore, the government policies would focus on a more resilient, sustainable, and innovative future to recover and regain world-class tourism (Department for Culture Media & Sport, 2021).

In addition, Table 4 shows the tourism policies before and after the COVID-19 pandemic in three countries. Further, this table shows different recovery plans discussed by each policymaker in the country. Thus, this summarizes the approaches of policymakers in

their countries.

Table 4. Tourism Policies Before and After COVID-19 (Korea, Canada, the United Kingdom)

	Korea	Canada	United Kingdom
Before COVID-19	1. Encourage domestic travel 2. Promote international tourism 3. Support tourism businesses with consultations and commercialization	1. Attract visitors to the communities of Canada 2. Establish tourism investment groups 3. Public-private collaboration from a new angle	1. Tourism landscape 2. Seek to have more skilled employees 3. Encourage and support businesses in all industry 4. Better transportation system to reach not only the city but also rural areas 5. Easy visa process
After COVID-19	1. Continue to promote domestic tourism 2. Promote Korea to neighboring countries 3. Discover and develop innovative tourism businesses	1. Support tourism businesses 2. Increase safety measures from the pandemic (testing and quarantine) 3. Maintain global competitiveness	1. Recover the visitor spending level 2. Share the benefits to every region 3. Productive and resilient tourism 4. Minimize environmental causes and remain the heritage 5. Enhance inclusiveness and accessibility 6. Become a hosting country to hold events

Overall, all three countries show how important government-level intervention is required to recover from this hard-hit sector. The government interventions in these countries protect the survival of businesses, rebuild confidence for travelers to visit, and safety measures to resume domestic and foreign tourism.

4. CONCLUSION

4.1 Conclusion

COVID-19 and the tourism industry are the areas that cannot be thought of separately. Tourism policy shifted globally after the COVID-19 pandemic emerged. Section 2 pays attention to tourism policy before and after the COVID-19 pandemic. Before the pandemic broke out, the governments focused on fostering the growth of the tourism industry. At that time, policies prioritized better tourism destinations than other countries and considered environmentally friendly tourism. After the pandemic, the government's goals in the tourism industry are slightly different. First, recovery from the COVID-19 outbreak is urgent. Then, combining digital skills and the tourism industry becomes next. Finally, achieving a digital future in the tourism industry is the last objective in the tourism industry. Therefore, Section 2 discusses what global tourism policies were dominant before and after COVID-19.

Tourism policies have notable differences after COVID-19. Shifts in the tourism policies are discussed in Section 3. It discusses different governmental tourism policies of Korea, Canada, and the United Kingdom. Before the pandemic, attracting and encouraging domestic tourism and supporting tourism businesses were common policies. Also, after COVID-19, recovery from the pandemic and continuous support to tourism businesses are two common policies among the three countries. Although the three countries are from different continents, policymakers implement some common tourism policies. These policies conclude that financial support to tourism businesses is helpful to the tourism industry because of shrinking consumers and spending in the industry. Therefore, three countries' tourism policies are analyzed.

Confirmed cases of COVID-19 started to decline in March 2022. As a result, in June, only about 10,000 new cases were detected daily in Korea (Bhatia et al., 2022). The

continuous decline of confirmed cases of COVID-19 and an increasing number of vaccinated people made countries relax international travel regulations. When confirmed cases rise, people cannot think of traveling outside their country. However, when countries reopen their borders and welcome international visitors, many people change their minds about traveling internationally. In addition, aviation regulations such as restricting the number of arrivals of aircraft and flight prohibition time are being lifted. Besides, the obligation to quarantine for seven days, which had to be fulfilled when a non-COVID-19 vaccine entered Korea abroad, was lifted from June 8th, 2022 (Bhatia et al., 2022). Therefore, many people have traveled and plan to travel.

From 2022 onwards, many people plan to revenge travel, meaning that people are eager to travel out of the country as countries reopen borders. Even though the COVID-19 pandemic has not been over yet, people book hotels and confirm plane tickets to go on a trip after delaying their trips several times. They reward themselves for persevering in their desires to go on vacations. Postponing their plans to go on a trip was a difficult time. This means that Korea needs to have a competition to attract many international or domestic visitors. As a result, policymakers have to consider more to get more international visits from other countries.

The Korean case is reviewed in section 3.1. Korean government encouraged visitors to travel to domestic tourism destinations, enhanced visitors' experience with international tourism, and supported tourism businesses. After the COVID-19 pandemic, three policies were implemented. The government puts emphasis on domestic tourism, promotes Korea to international visitors, and the government tries to develop tourism businesses. As a result, this case reveals that tourism businesses and international visitors are essential to take action to attract many tourists to Korea.

4.2 Policy Recommendations

Airplane prices are skyrocketing globally, and the demand for flying is at its peak (Holzhauer, 2022); for the Korean government to take this opportunity to attract Korea to the country where it wants to travel the most, the recommendation for the Korean government is listed. First, it is necessary to establish a regional tourism policy strategy of government intervention. Second, to improve the difficulty of not being able to come to tourist attractions due to linguistic difficulties by solving language barriers for foreigners who live in Korea or abroad.

Governmental tourism policies on regional development should be implemented. As Section 3.2 reveals that Canada provides tax incentives to be the most competitive country, Korea also needs to have competitiveness. This regional development strategy is similar to the UK tourism policy after COVID-19 sharing the benefits.

National and local authorities firmly believe that local development will add more tourism value. Regional development is expected to show how much people would like to travel to the region and the country. As it increases the number of international tourists visiting, it directly affects the demand for tourist destinations, and regional development strongly influences attracting tourists. Therefore, regional development has a positive effect on attracting domestic and foreign tourists and people living in the area.

As for regional development, it is highly expected that it will already be opposed by most people who do not live in the area. However, what needs to be changed in tourism policy is people's perception of regional development. Korea is the country with the most significant interest in real estate globally. Real estate is a hot issue whenever a government comes into power, and whenever real estate policies change, people's votes react with

enthusiasm. This is prominently occurring in Korea. In other words, it is no exaggeration to say that Koreans laugh and cry because of real estate. Many questionnaires for people in their 20s and 30s reveal that most picked reasons for not deciding to get married are housing problems. In other words, they claim that it is difficult to find a house to live near Seoul, the capital city where most people desire to live. While many people dream of owning a home, it is expected that local development will entail much interest, both good and bad. Whenever a policy is changed, many votes fall or stick, and it is safe to say that the real estate policy is the policy that determines the votes of many of those policies.

It is usual to get support or criticism when urban railroads are laid or subway lines are extended. For example, if the subway or GTX lines are lengthened to ease the use of public transportation, it is considered a regional bias in Korea. On the other hand, suppose the government only focuses on local development in a specific area. In that case, it may be helpful to the area with PIMFY (Please in My Front yard), or it support for residents to fight to avoid losing their financial interests to other areas. One of the examples is the Saemaul Undong. At the time of former President Park Chung-hee, he developed the Gumi, the region where he was born and raised. Thus, this movement gave some people the perception that it was against the balanced development of favoritism in a particular region. Since it can cause regional confrontation, it is necessary to be more careful when developing regional areas and create essential success factors by thoroughly controlling the legal and regulatory environment. Although narrowing the regional gap, which is a task that needs to be solved for long-term national development, is something that Korea continues to do. Therefore, it is believed that a synergistic effect is required, with many ministries united to solve this task.

Regional development will 1) be recognized as a tourism site 2) provide convenience for people in non-metropolitan areas 3) reduce the number of young people leaving non-metropolitan areas to find jobs. Above all, it is a tool to reduce inequality and spur

development for people in non-metropolitan areas. As an example of regional development, positive results can be expected, increasing the number of travelers traveling to non-metropolitan areas due to the expansion and expansion of public transportation.

Tourism destinations still preferred for domestic and international visitors are the metropolitan area rather than the provinces and Seoul rather than the metropolitan area. For that reason, Seoul, the capital city of Korea, maybe the most comfortable city for tourists. There will be no reason to get out of Seoul because it excels in tourism infrastructure and everything. However, suppose we develop public transportation and infrastructure through regional development. In that case, we expect that we will be able to reduce the concentration of the metropolitan area as a tourist area if we can achieve balanced development by providing convenience to people in non-metropolitan areas.

Another recommendation is to resolve language difficulties. This barrier is enormous that it is needed to resolve in consideration for tourists. For foreigners living in the area, it will be difficult to come if the local festival is promoted and guided only in Korean. Therefore, when planning a local festival, it is possible to actively inform foreigners and attract more information such as festival information for foreigners. As Korea's post-COVID-19 tourism policy is towards neighboring countries, resolving language issues would be a simpler way to bring more foreigners inside or outside of Korea.

Specifically, it is recommended to have another language for public transportation to ensure that travel information is given to international visitors. It would cause positive impacts not only on many cultural heritages but also on non-metropolitan public transportation facilities. From Korail, Seoul Metro, and Busan Transportation Corporation, subways in big cities have route maps in English, Japanese, Chinese, and tourist routes. Other languages are provided in large cities with a high demand for foreign tourists,

considering the country with the most significant number of tourists visiting Korea. To increase international visitors to small and medium-sized cities outside the metropolitan area, preparedness in language seems necessary.

Therefore, it seems necessary to attract foreign tourists living in the area or nearby area by promoting it to foreigners, and it is possible to establish a tourism policy that gives more power to attract foreign tourists by providing more travel information in other languages in consideration of foreigners when coming by public transportation. By offering several language pamphlets and providing guidance on local events or national heritage, it is expected for the Korean government to minimize crowding in the metropolitan area and develop non-metropolitan areas rather than cities. This leads international visitors and Korean tourists to visit Korea, which policymakers are trying to achieve.

Overall, it is expected that regional development and reduction of language barriers among tourism policies will be significant due to the effect of promoting regions abroad. All of this is a public interest that must be accompanied by intervention at the national level, as stated earlier, and that can be achieved through close consultation and efforts between relevant ministries, not only national but also regional. The increase in the number of international or domestic tourists is the interest of all countries now that the number of COVID-19 patients is decreasing. Thus, if the Ministry of Culture, Sports, and Tourism develop its tourism policy more closely, the Korean government would expect to attract a large number of tourists within a country and from outside.

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