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STUDY OF THE SPECIFIC COVID-19 PANDEMIC EFFECTS ON THE BULGARIAN TOURISM LABOUR MARKET[3]

The Covid-19 pandemic has significantly affected tourism in the last two years. The tourism industry forms a big part of the world's GDP and is an important industry in terms of employment. The great leakage of qualified, experienced and motivated tourism workers is severe for the future recovery and development perspectives of the tourism business. Tourism-dependent destinations, such as Bulgaria, are the most affected. Almost 11% of the Bulgarian economy is formed by the tourism industry. Some regions, such as the Black sea coast, are one of the tourism most dependent regions in the country as many people see their livelihood in tourism employment. Moreover, as a tourist destination with traditions, Bulgaria's tourism foundation is contained in the experienced and qualified workers in the industry. The main purpose of the present article is to investigate the Covid-19 impact on the Bulgarian tourism labour market due to reveal the future perspectives for its development.
Keywords: Tourism; Covid-19 pandemic; labour market; resilience; Bulgaria
JEL: J60; J81; L83; Z32

1. Introduction

The current study is dedicated to an extremely current topic, namely "problems with staff in tourism". Its purpose is to check the attitudes and motivation of the participants in the tourism labour market after the Covid-19 pandemic.

The subject of the study is the assessment of the consequences of the Covid-19 pandemic for those employed in the tourism industry.

The object of study are the two tourist regions – Varna and Burgas Black Sea coast. In order to achieve the set research goal, the authors set themselves the following tasks:

- To evaluate the impact of the Covid-19 pandemic on the tourism industry;

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- To analyse the specific consequences of the Covid-19 spread on the tourism labour market;
- To investigate and evaluate the opinion of employers and employees towards the consequences of the pandemic for employment in the tourism industry;
- To outline the possibilities and future scenarios for tourism resilience and to make recommendations to minimise the negative effects of the pandemic.

The following research methods were used for the implementation of the research tasks – analysis and synthesis, desk research, observation, secondary data analysis, survey among employers and employees, etc.

2. Covid-19 Crisis – An Assessment of Its Impact on the Tourism Sector

The Covid-19 pandemic significantly impacts the global economic, political and socio-cultural systems. Health communication strategies and measures (e.g. social distancing, travel and mobility bans, community lockdowns, self- or mandatory-quarantine, etc.) have halted global travel, tourism and leisure (Sigala, Marianna, 2022).

The tourism sector is one of the worst affected by the impacts of Covid-19. International arrivals have increased by just 4% in the second year of the pandemic; with 1 billion fewer arrivals when compared to pre-pandemic levels. 63% of experts from the World Tourism Organization (UNWTO) believe the sector won't fully recover until 2024 (World Economic Forum, 2022).

Figure 1

International tourist arrivals worldwide

Source: World Tourism Organization (UNWTO).

Moreover, as 2021 drew to a close with severe limitations to travel still in place, the World Tourism Organization (UNWTO) reported that international tourist arrivals increased by just 4% last year, remaining 72% below 2019 levels. That equates to more than 1 billion fewer international arrivals compared to pre-pandemic levels, keeping the industry at levels last seen in the late 1980s. Prior to the coronavirus outbreak, the global tourism sector had seen almost uninterrupted growth for decades. Since 1980, the number of international arrivals has increased from 277 million to nearly 1.5 billion in 2019. As the chart for Global Travel shows, the two largest crises of the past decades, the SARS epidemic of 2003 and the global financial crisis of 2009, were minor bumps in the road compared to the Covid-19 pandemic (Statista, 2022).

Marinko, Skare and D.Soriano summarise their study results and conclude that the impact of Covid-19 on the travel tourism industry will be incomparable to the consequence of the previous pandemics. Depending on the dynamics of future pandemics (from April 2020), the best-case scenario shows that the travel tourism industry worldwide will drop on average from -2.93% to -7.82% in the total GDP contribution. Jobs in the travel tourism industry will decrease by -2.44% to -6.55%. The estimated lost inbound tourist spending ranges from -25.0% to -35.0%. Total capital investments fall from -25.0% to -31.0% (Marinko Skare, Soriano, Rochon, 2021).

As many countries introduced travel restrictions to contain the spread of the virus, travel across the world significantly declined from 2020 onwards. The financial repercussions of the coronavirus have already begun to manifest themselves within the tourism industry. In 2020, global revenue from the travel and tourism industry was estimated to drop from a forecasted USD 711.94 billion to USD 568.6 billion, representing a decrease of over 20%. The region predicted to see the highest decline in revenue was Europe, decreasing from USD 211.97 billion in 2019 to roughly USD 124 billion in 2020 (Lock, 2022).

According to the World Tourism Organization (UNWTO, 2022), the consequences of the pandemic on tourism worldwide could be reduced to:

- Tourism is one of the sectors most affected by the Covid-19 pandemic, impacting economies, livelihoods, public services and opportunities on all continents.
- Export revenues from tourism could fall by USD 910 billion to USD 1.2 trillion in 2020. This will have a wider impact and could reduce global GDP by 1.5% to 2.8%.
- Tourism supports one in 10 jobs and provides livelihoods for many millions more in both developing and developed economies.
- In some small island developing states, tourism has accounted for as much as 80% of exports, while it also represents important shares of their national economies.
- As many as 100 million direct tourism jobs are at risk, the labour-intensive accommodation and food services industries that provide employment for 144 million workers worldwide are the most affected.
- Small businesses (which form 80% of global tourism) are particularly vulnerable.
- Women, who make up 54% of the tourism workforce, youth and workers in the informal economy are among the most at-risk categories.

The coronavirus pandemic is developing extremely dynamically in Bulgaria as well the end of the first and the beginning of the second quarter of 2020. The intensity of the process of globalisation in recent is the main prerequisite for the rapid spread of this crisis worldwide. For countries such as Greece, Cyprus and Croatia, where tourism accounts for more than 20% of GDP, the economic damage is more than significant. Countries such as Italy, Slovenia and Bulgaria have also suffered a significant hit, where the industry accounts for about 12-13% of the GDP of these countries.

The hotel and restaurant sectors are most affected in terms of loss of employment and volume of services offered, as their impact on other economic sectors is significant. The recovery of the sector depends to the greatest extent on how quickly the pandemic will be controlled (Ministry of Tourism, 2022). Travel restriction measures in Bulgaria imposed since the beginning of 2020 and introduced social distancing measures have had a significant negative impact on economic activities that rely on physically close interactions between people. This adversely affected air transport and led to its drastic contraction. In the state of emergency in April 2020, the total number of flights on the territory of the country was -81.2% less compared to the same period last year. The loosening of restrictive measures in the coming months contributed to limiting the pace of decline to -51.2% by November 2020. From the beginning of February 2021, the declines are moving at levels of about -55%. (Ministry of Tourism, 2022). According to NSI statistics on the visits of foreigners to the country, in March and April 2020, an unprecedented decline in the number of trips of foreign nationals was registered due to the suspension of international flights and the closure of land borders. The annual rate of decline in visits of foreigners to Bulgaria in April amounted to -88.9%, and in total, for 2020, the decrease amounted to -60.4% (National Statistical Institute, 2022).

During the period January – November 2021, the total number of tourist visits of foreigners without transit in Bulgaria is 3 504 729, and the number of foreign tourists staying in accommodation places is over 1.8 million. The increase in the total number of tourist visits of foreigners for the first 11 months from 2021 compared to the same period in 2020 is 36.1% (Ministry of Tourism, 2022).

The structure of visits by foreigners is also changing – in 2019, trips for "rest and excursion" occupy 46.7% of the total, while in 2020, their relative share decreased to 27.4%. For the period January-November 2021, according to NSI data, there was a 63.5% increase in visits for rest and vacation and a 16.6% increase in visits for the purpose of business tourism (National Statistical Institute, 2022).

The European institutions are responding to the situation. They focus on gathering the necessary information, conducting discussions with stakeholders, as well as developing situation reports and proposals for resolutions and initiatives in the field of tourism. The most urgent initiatives are: Common standards at the EU level; Consistent and transparent risk assessment criteria; Direct and sector-specific financial support; Tourism Crisis Management Mechanism; EU Strategy for the Development of Sustainable Tourism.

The Covid-19 pandemic rewrote the theoretical and practical statements of tourism. It has already imposed and will continue to impose new trends in world tourism, which are already reflected in the demand and supply of tourist products. The pandemic also poses major changes in consumer behaviour and attitudes in search of tourism products and services. There are changes in terms of: motives, goals, thinking, value system, desires, priorities, ways of booking and buying, ways of travelling, holiday planning, the final choice of consumers, etc.

All these changes require rapid adaptation, both for producers and consumers. Symbiosis is needed between all stakeholders in the tourism industry to ensure efficient tourism management.

We can conclude that tourism is alive and desired by consumers. Covid-19 marked the beginning of a new stage in the development of tourism, which greatly changed it in terms of demand, safety, secure environment, planning, digitalisation and technology, destination marketing, market behaviour and more. These circumstances are the basis for outlining the challenges facing tourism since Covid-19.

Products and markets:

- Development of innovative marketing concepts to ensure sustainable growth in the sector. These concepts should aim for qualitative rather than quantitative growth, as well as balancing geographical and seasonal focus and creating new niche products.
- Promoting alternative forms of tourism that help to diversify the product offer. Diversification of tourism products in conjunction with other sectoral activities, such as agriculture, will create local tourism proposals that help to overcome the difficulties.
- Creating new products and services tailored to specific markets. Focusing on specific target groups (age group, nationality, marital status, etc.) or types of services (adventure, conservation, wellness, cultural tourism, etc.) can open more opportunities for trade and income.

Investments:

- Investment in the blue economy, including state budgets, EU funds, trade loans, international financial institutions and capital market financing;
- In addition, better coordination is needed between national and regional authorities, which manage a number of EU programs, as well as more coordination with other international donors and potential private sector investment.

Research, technology and innovation:

- Using technologies and innovations in tourism promoting. For example, integrating niche tourism offerings and using mobile applications (e.g. building an ICT platform to connect a culinary route, bird watching and a coastal wellness/spa) can help develop year-round congress tourism. The application of promotional tools and the use of existing travel applications (e.g. TripAdvisor, Booking.com) by continuously uploading information on natural tourism products to selected target groups will help to overcome the negative effects of the pandemic.
- Opening new market opportunities for tourism products through digitalisation. Adopting innovations in the field of ICT, social media and other high-class technological innovations will stimulate new services, access to global market niches and a better understanding of market trends.

- Stresses the importance of establishing or renovating specialised higher education institutions (management and economics of tourism enterprises, tourism professions, maritime schools, cooking schools, etc.), as well as improving the training offered in order to improve the quality of services and products in the field of tourism, the use of new technologies and adaptation to climate change;

In order to make the most of the opportunities offered for tourism development after Covid-19, public and private stakeholders must join forces and work in a single policy framework that considers the EU's new priorities and the challenges identified.

3. The Specific Consequences of the Covid-19 Pandemic on the Tourism Labour Market

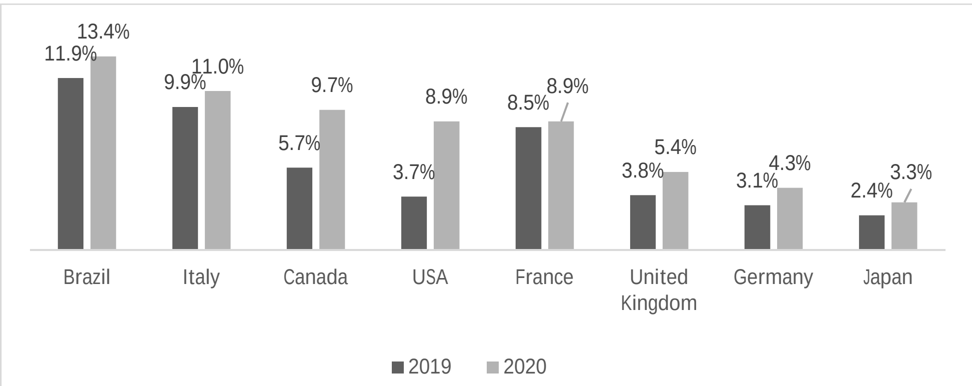
3.1. General view of the Covid-19 pandemic effects on the tourism labour market

To have a better understanding of the Covid-19 influence on the tourism labour market, it is necessary to take a look at the general situation regarding the unemployment rate movement due to the pandemic.

The unemployment rate showed a big increase in a number of states due to the pandemic. Most significantly, it rises in Canada and the United States, where the increase is respectively 4% and 5.2% (Jones et al., 2021).

Figure 2

The unemployment rate movement in countries due to Covid-19, 2019-2020



Source: Lora Jones, Daniele Palumbo & David Brown, 2021, Coronavirus: How the pandemic has changed the world economy, https://www.bbc.com/news/business-51706225.

Specifically, in the travel industry, which was most affected by the pandemic, the loss of employment was significant. Research by WTTC shows that 63 million jobs were lost in 2020 due to the pandemic (WTTC, 2021). This is a tremendous loss of 18.5% of the employment in tourism, leaving a lot of families without the needed livelihood. Due to other researches, the decrease in tourism employment is even bigger – 100.7 million jobs fewer in 2020 compared to 2019 (Statista, 2021).

Table 1

Job loss in the tourism industry worldwide

Region	Statistica (mill)	Statistica (%)	WTTC (mill)	WTTC (%)
Asia-Pacific	63.4	*34.2%*	34.1	*18.4%*
Europe	13.0	*33.6%*	3.6	*9.3%*
North America	8.2	*32.2%*	7.1	*27.9%*
Africa	7.6	*30.9%*	7.2	*29.3%*
Latin America	4.7	*27.5%*	4.0	*23.4%*
Middle East	2.6	*37.7%*	1.2	*17.4%*
Caribbean	1.2	*42.9%*	0.7	*24.7%*
TOTAL	100.7	---	63	---

Source: WTTC, 2021, Europe: 2021 Annual Research: Key Highlight Total contribution of Travel & Tourism to Employment, https://wttc.org/Research/Economic-Impact, Statista, 2021, COVID-19: job loss in travel and tourism sector worldwide 2020, by region, https://www.statista.com/statistics/1104835/coronavirus-travel-tourism-employment-loss/.

The difference between collected data could be found in the fact that WTTC explored the jobs directly employed in the tourism industry, and Statista conducted their research about the loss of jobs in the tourism and tourism-related industries, which shows the total impact of Covid-19 on employment and could be defined as more accurate.

According to a report by UNWTO in terms of unskilled labour, the unemployment rise could vary between 0% and 15% where in countries with bigger dependence on the tourism industry, the percentage could be even bigger. Generally, the average rise in the unemployment rate in the tourism industry is 5.5% in 2020. The research shows that a big part of tourism employees, especially by the direct operations in the industry, are unskilled workers (UNWTO, 2021).

Other research in Europe showed that the pandemic also had different effects on each sub-sector of the tourism industry. Data shows that the most significant impact was on the European hotel industry with very low occupancy rates (54%) and extremely low average daily rate (18%) in 2020. The next hit sub-sector was food and beverage, where employment decreased by 30%. The drop in overall turnover in sub-sector travel agencies was 71% in 2020 in comparison to 2019. Eurostat reported a 63% drop in employees from 2.7 million workers in Q4 2019 to 1 million workers in Q4 2020. Other hard-hit sub-sectors were business trip providers, event organisation and international transport. By the last, air transport was totally blocked, with a reduction of 84% in international air traffic in the first months of the pandemic. From 2014 to 2019, one in four new jobs was related to travel and tourism, with over 330 million jobs in the industry, presenting one in ten jobs on a global level. In 2020, that number was reduced, showing a decrease of nearly 18% on a yearly basis (Panteia et al., 2021).

3.2. Specific influence of the Covid-19 pandemic on the tourism labour market

There are some studies on the influence of the Covid-19 pandemic on the tourism labour market, which discover the specific effects and results of the pandemic on the investigated object of the study (Correia et al., 2020; Lhano et al., 2021; Carvalho et al., 2021; Raimo et al., 2021).

The most interesting of them reveals a more accurate method for measuring the influence of Covid-19 on the unemployment in tourism and the derivative effect on society and economy (Lhano et al., 2021). Instead of taking into consideration the most common "unemployment rate", they use the changes in the number of hours actually worked in the tourism industry, which focuses on the actual changes in labour force participation in the industry. The study reports a positive correlation between Covid-19 cases and the unemployment rate among different nations, which is not a surprising conclusion. More interesting, the investigation concluded that lockdowns did not have a significant influence on unemployment in Southern Europe and evolved the idea that fear from the Covid-19 infection was the main factor leading to people not searching for jobs, which led to an increase in unemployment rate. Tourism has always been related to direct contact between people, which was impossible at that moment. In the tourism industry, front office operation (face-to-face services) is 70% and more of the tourism product, which in pandemic situations harms the opportunity not only to perform the job in a natural way, but also to perform the job at all. The negative impact of Covid-19 has different dimensions due to the circumstance that some of the regions are traditionally touristic areas and a major part of the local economy is generated by tourism business – which is the case with the Black Sea area in Bulgaria. Though, in this paper, the investigation shows that educated and qualified workers have lower unemployment rates through crises than the less acknowledged workers.

Focusing on the influence of Covid-19 pandemic on the tourism labour market in terms of comparison with tourism non-related industries, there is a recent study on this topic (Needham, 2021). International Labour Organization's research highlights the massive Covid-19 impact on tourism employment in Asia and the Pacific. Due to the pandemic, the investigation proved 4 times greater loss in jobs related to tourism than in non-tourism industries in 2020. Moreover, the loss in working hours in tourism-related industries was 7 times greater than in other industries, which proves the statement that a big part of the workers moved into the informal sector. Another study in Canada pointed out other important consequences of the Covid-19 pandemic for the tourism labour market. During the first year of the pandemic, the drop-down of tourism employees in Canada was 22%. As in many other countries prior Covid-19 there was also a shortage of the needed workers for Canadian tourism, which was one of the main limitations of tourism growth. The prediction is that even when the pandemic is over, a big part of the so-called "displaced workers" will not return to tourism, which will affect it dramatically (Tourism HR Canada, 2021).

A valuable study on a post-Covid-19 model for the resilience of the employees in tourism directs the attention of the research to the essence of the main part of workers in this sector – the non-standard-workers and the high sector mobility of these (Martins et al., 2021). The research suggests that many of the employees in tourism perform interpersonal skills, which are also important in other sectors such as trade, teaching, retail etc. This is the basic reason for tourism employees to perform intensive sector-mobility and to transfer their workforce to other relative to their skills sectors. In conclusion, pandemics increase the need for sector-transferable skills and sector-mobile workers, but on the other hand, this could have a disastrous effect on the future of labour in tourism, suggesting the big question if these workers will return to the tourism industry in a post-Covid-19 situation. In the future, there will be more pandemics (Worldforum, 2019) and the scenario for transferring the workforce from one industry to another is vital to be developed in the best manner.

Taking Bulgaria into consideration, the Covid-19 pandemic caused a severe impact on the labour market in tourism. Generally, vaccinating workers in direct contact with tourists is vital for the recovery of the tourism industry. Unfortunately, in Bulgaria, the process of vaccination is slow, with the lowest levels in the EU – 23.9% compared to 63.7% on average in the EU (Gomez, 2021). The lack of a timely, well-organised official information campaign for Covid-19 and the pros and contras of the certified vaccines sabotaged the vaccination process. Doubts and distrust are limiting from an emotional and psychological point of view, the willingness of workers in tourism to vaccinate. The results are:

- Low confidence of international and domestic tourists in safety and responsibility toward personal and public health in Bulgarian tourist enterprises;
- Low confidence in employees in the tourism industry for working in a safe environment, which leads to the outflow of labour from the industry;
- Low confidence in government and society in the tourism business ability to maintain the risk in the pandemic and provide safe and professional tourism services.

3.3. Covid-19 influence on tourism employee's well-being and recovery possibilities

There is a lack of research papers on the Covid-19 pandemic effects on human resources from the psychological and emotional point of view (Albert et al., 2021; Luu, 2022; Chen, 2021; Huikari and Korhonen, 2020). Most of the researchers in relation to Covid-19 – tourism focus on the tourists and destination economy side, without taking into consideration the big burden of the pandemic for the workers in the tourism industry. A recent study on tourism employees' social and psychological well-being investigated their preparedness to support recovery strategies in the tourism industry (Albert et al., 2021).

Figure 3

Adopted basic cycle of the negative emotional and psychological impact of Covid-19 on employees in tourism

Source: Created by the authors on Albert et al., 2021.

The most common situation on tourism labour market, taking into consideration the Covid-19 impact is losing temporary or permanently workplaces. Additionally, the impossibility of governments to provide timely and sufficient measures because not knowing the virus, put workers in tourism in a helpless situation. Therefore, it is important in this situation for tourism organisations to achieve recovery in terms of human resources. The understanding of the term "resilience" in one of the recent researches (Albert et al., 2021) is borrowing

O’Brien and Hope (2010) perception that resilience is the ability to seek out the opportunities that arise during the crisis. This means that three main results are to observe:

- The ability of organisations to adapt to a new terms and conditions.
- The power of crises to “clean” the industry from outdated and inefficient agents.
- The capability to rebuild and create sustainable and prospective business models.

Tourism is highly dependent on well-trained, experienced and qualified workers adding value to the “quality service”. In times of crisis, the main purpose of tourism organisations should be the retention of such employees. In this sort of meaning, there is a need for specific human resources management to avoid this negative impact. Sensemaking-motivation, a protected working environment and good communication between the stakeholders are very important.

4. Research Methodology for Analysis and Evaluation of the Opinions of Employers and Employees on the Consequences of the Covid-19 Pandemic for the Tourism Labour Market

4.1. General patterns of the study – subject, object and purpose of the study

The analysis and evaluation of the opinions of employers and employees on the consequences of the Covid-19 pandemic on the labour market in the tourism industry were carried out on the basis of a survey. The survey is anonymous, consisting of 3 separate sections for employers, former and current employees in the tourism industry. The section for employers consists of 13 questions, and the sections for former and current employees – 10 questions each. The database of the current survey includes the following main descriptive characteristics provided in *Section 1* of the specially designed questionnaire:

- Identification data – gender, age, monthly income, marital status, affiliation to tourism sectors;
- Information about the employees – experience, remuneration, working conditions, professional qualification, etc.;
- Information about the employer – type of enterprise, size, main activity.

A significant part of the information is also based on the multiple answers in the evaluation cards for employers and employees. This applies in particular to:

- Specific activities carried out by employers and employees;
- Detention or dismissal of employees because of Covid-19;
- Assessments of the state’s political actions to deal with Covid-19;
- Hiring new employees;
- The importance of staff;
- Retention and motivation of employees;

- The outflow of employees;
- Covid-19's impact on the future of employment in the sector.

The subject of this study is to examine the opinion of employers and workers (current and former) in the tourism industry on the specific effects of the Covid-19 pandemic on the labour market in tourism.

The first goal of this study is to systematise information about the problems and future development of the employment in tourism after the Covid-19 pandemic and to develop on this basis:

(1) Methodology for studying the Covid-19 effects on employers and employees in tourism;

(2) Methodology, incl. questionnaires for research, analysis and assessment of the problems of employers and employees in tourism after the Covid-19 pandemic.

The second goal of the present study is to analyse the staffing problems due to the pandemic and to outline possible scenarios for reducing the negative consequences. In particular, conducting a study among:

(1) Local government structures at the regional level – in order to establish the current state of existing strategies and programs for tourism development against the background of the pandemic.

(2) Managers of tourist establishments **–** indicating the typical problems in hiring, retaining and managing employees during the pandemic.

(3) Current and former employees in the tourism industry – problems in retaining, motivating, managing and paying them during the Covid-19 pandemic.

In conjunction with the **research methodology**, for the realisation of the goals of the study, a set of research methods and approaches is used, some of which are: *analysis and synthesis, spatial comparative analysis, induction and deduction, observation, statistical methods, questionnaire survey, method of an in-depth interview*.

The **questionnaire survey** is conducted on the basis of surveys among tourism employees and employers in the surveyed area, as well as interviews with representatives of regional tourism business structures. The study was conducted in the period from 16.01.2022 – 28.02.2022, and it is presented in an online format using the tools of Google Forms Questionnaire. The sources of information are separated into two main groups. **The primary sources** include field research, in-depth interviews and surveys. **The secondary sources** cover mainly scientific works by Bulgarian and foreign authors and specialised publications of business and tourism organisations.

The object of study is **geographically limited** only to the opinion of employers and employees on the consequences of the Covid-19 pandemic in the tourism industry in two tourist regions: *Varna* and *Burgas Black Sea coast*. The choice is purposefully made and linked to the professional experience of the authors.

The object of study is also **nationally limited** to the problems of employers in hiring, retaining and motivating employees in Bulgaria and, in particular, the two mentioned regions during the pandemic. Therefore, the various sections of the survey are distributed only in the Bulgarian language.

There are also **time limits** for the period of empirical research. They take into account some factors of the external (political, social, and demographic) and internal environment of tourism enterprises, as well as the beginning of the active tourist season in 2022.

The leading **research problem** in conducting empirical research is related to the lack of specialised scientific literature and statistical information on the subject.

In order to collect empirical data in the last phase of the research, questionnaires consisting of four sections were distributed. The questionnaires were sent to non-government organisations in the tourism industry, who were invited to spread the questionnaire among its members; to employers in the tourism industry in partnership with both universities; to both student organisations in the tourism field formed in both universities. After the survey was conducted, it was found that for the purposes of the analysis, the questionnaires of 242 respondents could be used.

A sample approach to the study of aggregates was used to study the opinion of employers and employees on the consequences of the Covid-19 pandemic for the labour market in the tourism industry. The measurement and evaluation of the parameters of the population is mediated due to the fact that only a limited number of representatives of the population are studied. The expediency of the sampling approach is associated with its speed, relatively low cost, lower error rate compared to comprehensive studies. The sample model is a non-target random sampling type, which is widely used in the study of customer satisfaction levels (both – employees and business side). This sample is associated with several circumstances: first, when conducting formulation research; second, when studying sufficiently homogeneous aggregates of units; third, in preliminary tests of field documents (questionnaires, diaries, etc.).

In the current research related to employees, we work with accuracy: *Significance level = 0.05.*

In processing the data from the survey for analysis and evaluation of the opinions of employers and employees on the consequences of the Covid-19 pandemic in the tourism labour market, non-parametric methods were used to study the relationships between variables. Representation is ensured on the basis of similarities and analogy.

4.2. Survey questions for the opinion of the employers and employees in the tourism industry

Section 2 of the provided empirical study is referred to the employers in the tourism industry. The main purpose of the questions is to give clarity about staff changes after the pandemic, possible schemes of overwhelming the difficulties in the working environment, including evaluation of the government support, their views about hiring new workers and their perspective on the future development of tourism. Twelve specific questions were designed to investigate the opinion of the target group: eight of them are the type choice of given options, with three of them multiple choices possible and four of them are interval scale questions with evaluation from 1 (absolutely not correct) to 5 (absolutely correct).

Section 3 of the provided research is referred to former employees in the tourism industry. The main purpose of the questions is to clarify the specific reasons for losing their job and to give us a sight of their willingness to return to working in the tourism industry. There are ten specific questions – six of them are choice of given options with two of them multiple choices possible, one of the questions is open to give a short answer, one of them is ratio scale type and the last two are interval scale questions with evaluation from 1 (absolutely not correct) to 5 (absolutely correct).

Section 4 of the conducted study is forwarded to current employees in the tourism industry. The specific questions are giving insights to clarify the reasons they remained working in the tourism business and to provide their evaluation of the situation after Covid-19 in the tourism industry and their statements for future development and resilience of tourism. There are ten specific questions – six of them are choices of given options with two of them multiple choices possible, two of the questions are ratio scale type and the last two are interval scale questions with evaluation from 1 (absolutely not correct) to 5 (absolutely correct).

5. Analysis and Evaluation of the Opinions of Employers Aand Employees on the Consequences of the Covid-19 Pandemic for Those Employed in the Tourism Industry

5.1. Employers

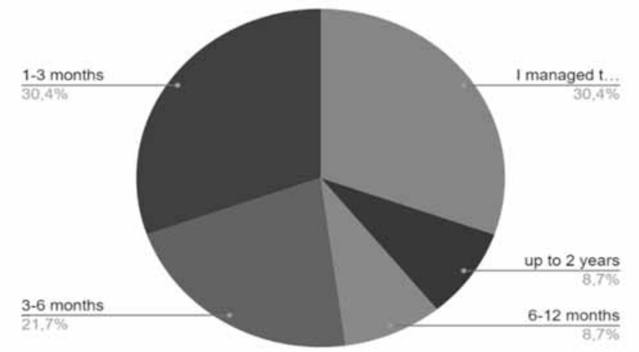
The number of employers who took part in the survey is 48. Their most important characteristics are: 29% are men; 71% are women; 44.7% are aged 16-29, 51.1% are aged 30-49, the remaining 4.2% are aged 50-65; over 75.5% of the employers have a monthly income per family member over BGN 600; 63.8% of them are married or live on a family basis. The distribution of respondents in the tourism sectors is as follows: 33% are in the hotel sector, 30% in the food and beverages sector, 18% are in the tour operator and agency sector, 5% are engaged in tourist transport, 8% provide additional services in tourism, 2% are employed in tourism management authorities, the remaining 4% are in the field of IT services for tourism enterprises. The employers who took part in the survey manage tourist organisations with up to 10 employees (41.7%), up to 20 employees (8.3%), up to 30 employees (12.5%), up to 50 (4.2%), and over 50 (33.3%).

According to employers, their attempts to retain all employees in the organisations after the Covid-19 pandemic have been mixed. Employers who manage to keep all their employees after the Covid-19 pandemic are 30.4% of respondents. However, the same percentage of employers managed to retain their staff only three months after the pandemic, and 21.7% of them made efforts to recruit the full number of employees between 3 and 6 months after the crisis. Another 17.4% of employers make efforts to retain employees for a period of 6 to 24 months.

The surveyed employers share that due to the pandemic, 25% of them are forced to decide to lay off 1 to 3 employees, 12.5% have laid off 3 to 6 workers, another 25% have laid off 10 or more staff, but the largest percentage of employers, 37.5%, did not lay off their employees because of Covid-19.

Figure 4

Employees laid off due to the Covid-19 pandemic (employer's point of view)

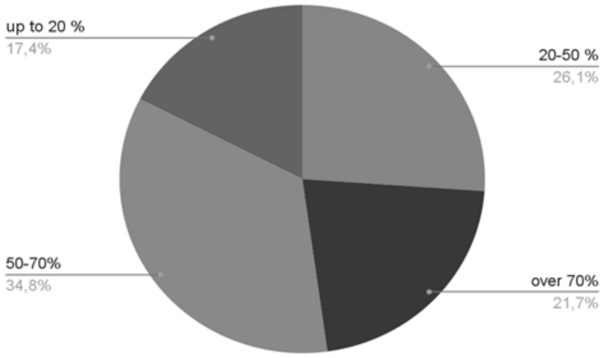


Due to the negative impact of the Covid-19 pandemic, the Bulgarian government proposed preventive measures in the tourism industry to control economic and human resources losses of the enterprises such as "Employment for you", "Save me", "60/40", "Subsidising tour operators for charter flights" and others. From the study of the tourism employer's opinion, state support measures in Bulgaria enjoy low public approval. According to the survey, more than 72% of employers describe as "*absolutely untrue*" that the state's policy actions managed to deal with the consequences of the pandemic for tourism employment; 70% that they are adequate, 66% that they are timely, 48% that they have been tested, 54% that they are effective. According to 56% of the surveyed employers, it is "absolutely true" that the measures are late; 63% of them that they are incomplete; 88% of them that they are incorrect and 92% determine them as inaccurate. As a result, 47.8% of surveyed employers have not applied for any of the government support measures. Another 13% of them applied but were not approved, and only 39.1% applied and received approval. The attitude of employers to the measures proposed by the state, such as "60/40", "80/20" is doubtful, because 92% of the respondents describe the measures as "late" and 73% as "ineffective". However, for 80.5% these government actions are "efficient", for 51% they are "accurate", for 43% they are "clearly regulated".

According to the surveyed employers, the pandemic has led to a decline in the turnover of organisations, as follows (Figure 4): by 34.8% decrease of 50-70%; by 26.1% decrease of 20-50%; by a 21.7% decrease over 70%; by 17.4% decrease to 20%.

When asked which of the following determines the hiring of new employees on a permanent contract for the upcoming season, 56.5% of employers indicate difficulty in finding suitable employees, 39.1% point to reduced turnover, 30.4% uncertainty, 26.1% investments in future periods, and 4.3% volatility. The largest percentage of employers (87%) are looking for potential candidates through job posting platforms. 69.6% rely on friends and acquaintances and only 30.4% use the employment agency as a channel for recruiting staff. There is a low percentage (13%) of respondents, who answered that there is cooperation with universities and high schools in tourism on issues of attracting workers. The Covid-19 pandemic also reduced opportunities to search for people by participating in tourist labour exchanges/ tourist jobs fairs (4.3%).

Figure 5
Decrease in the company's turnover due to the Covid-19 pandemic (employer's point of view)



The answers of the employers prove that the problem with the lack of staff in the sector is serious. Despite the consequences of the pandemic, more than 56% of employers put "lack of tourism staff" first rather than declining turnover or uncertain times. Despite this "lack", however, the surveyed employers are strongly against the "import of staff" in the sector. Over 50% of the respondents' answers were "that they would not take advantage of this opportunity", and the positive answers form 30.4%. These results confirm that the lack of staff in the tourism industry is a constant problem, which due to the pandemic, has been put back in focus.

The retention and motivation of employees in the tourism sector, especially after the Covid-19 pandemic, is a difficult, responsible and important task for employers. According to the survey data, the measures that businesses use to gain and retain employees are as follows:

In the first place (81%) of the respondents put the "correct attitude", in the second place (77.3%) is the "responsible attitude", the third position (68.2%) is for "bonuses and additional benefits". The fourth position was assigned by employers to "employees' salaries" (63.6%), followed by measures such as: "training and competence development" (40.9%), "career growth" (31.8%), "non-financial incentives" (22.7%) and state measures (9.1%). These results also confirm the negative assessment received by employers for the government's tourism support policy. State support ranks last among the respondents as an opportunity to retain, motivate and support employees in their enterprises.

Some of the main questions that need to be answered by our research are: why is there a shortage of staff in tourism, why there are no people willing to work in the sector and what are the problems of employees in the sector? In this regard, we asked the employers participants in the study how they explain the outflow of staff from the tourism sector. According to the data received, the main reasons how employers explain the outflow of staff from the tourism sector are: (They answered "absolutely true") "uncertain environment" (91%); "seasonality" (88%); "low pay" (76%); "non-standard working hours"/"irregular working hours" (64%). With a "true" answer: "'dissatisfaction" (58%); "hopelessness" (54%); "the image of the industry" (42%); "demographic crisis" (40%). An interesting fact is that the Covid-19 pandemic was ranked last by the respondents as a reason for the outflow (34%). It became clear that the Covid-19 pandemic is not the leading reason for the great staff outflow from the tourism industry, but according to the surveyed employers, it will affect the future of tourism employment in the following areas: it will definitely lead to "reorientation in other branches" (95%), "outflow of employees" (86.5%), it will be a reason to increase the "reluctance to study in the speciality" Tourism" (94%), "lack of qualified staff" (80.4%) and "low quality of service" (60.33%). Employers expect that the Covid-19 pandemic would contribute to the launch of a "new and effective state policy on tourism staff" (48%), as well as "coordinated action between industry, state, and NGOs to address the crisis in tourism staff (52%).

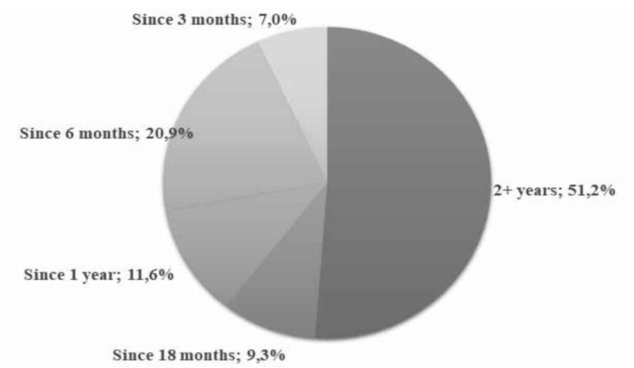
5.2. Employees

Seventy-six of the respondents who participated in the survey were former workers from the tourism industry. From these, 71% declare that they voluntarily left their job and only 29% from them chose the option "involuntarily released from job".

Most of the respondents are not professionally engaged in the tourism industry for 2 years or more (51%). Of all former employees, 22% left or lost their job within the previous 6 months. Equally – nearly 10% of the respondents are not professionally engaged in the tourism industry for not more than 1 year or 18 months, and the smallest share falls on those who lost or left their job within the previous 3 months.

Figure 6

Structure of the former employees in the tourism industry – period of work (former employee's point of view)



From 13 specific reasons for not working in the tourism industry at the moment, 3 of them could be notified as leaders (52% of the former workers), other 3 could be qualified as reasons with great influence (37.5% of the former workers). The other 7 specific reasons have gained fragmentary choices (2 to 4 choices). Of the 3 leaders of answers, none of them can be directly connected with the Covid-19 pandemic. Traditionally the "*low income*" and the "*irregular working hours*" are some of the most announced reasons for workers leaving the tourism industry. Unfortunately, the "*absence of professional development opportunities*" is an essential one and could be indirectly connected with the pandemic and its influence on tourism development. Of the other three reasons with a big influence on the respondents, two of them are also irrelevant to the pandemic – "*dissatisfaction with a short active season*" and "*feeling underestimated in the working environment*". The "*uncertainty*", which is the third reason, could be connected with the pandemic and the uncertain future of the tourism industry.

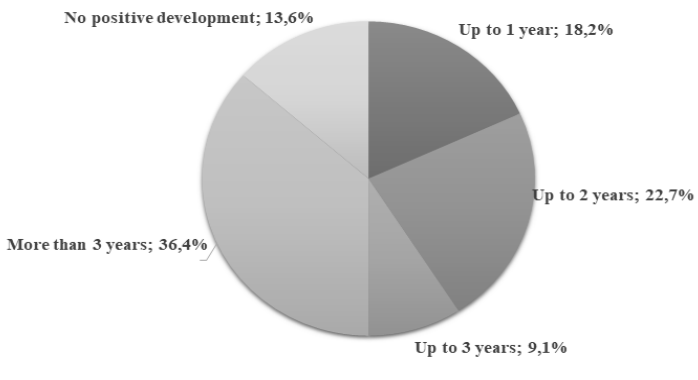
One of the main questions in the current questionnaire section was gaining information about the time period when changes in the working environment occurred after Covid-19. Of all 76 respondents, 64 indicated reduced salary, unpaid leave, extended working hours because of the reduced number of employees, consolidation of working positions and leaving/loss of job in the tourism industry occurred *in the first quarter after the pandemic*. This provides us important information about the type of attitude from an employer perspective – proactive. Few of the respondents have chosen leaving/loss of their job and consolidation of working positions in the period from three to six months after the pandemic. All other answers were given fragmentary – 1 to 3 given answers.

One of the most interesting questions is about the human resources transfer from the tourism industry. The respondents were given the opportunity to share in an open-answer field the industry they are already working in or the one they would like to reorientate. The indisputable leaders here are the IT industry, the retail industry and business process outsourcing (call centres). Others mentioned are the aviation industry, banks and insurance, logistics and telecommunication. Some of the respondents also claimed that they are still seeking for work at the moment, which seems to testify the complicated situation on the labour market because of Covid-19.

Asked if the participants would return to work in the tourism industry, 47.5% of them claimed that they would like to. Another 35% definitely denied such intention and the rest of the respondents could not make a decision at the moment (17.5%). The specific reasons for those, who would return to work in the tourism industry, are the *nature of work* (intensive communication with different cultures), the *job satisfaction in tourism*, and the *experience in the tourism field* they have gained through the years. The other given options –*teamwork* and *qualification*, are selected 14 and 12 times, respectively, which could also define them as reasons with influence.

Figure 7

Former employees' opinion about tourism resilience perspective



Concerning the opinion of the former tourism employees about the time perspective for the resilience of tourism and the tourism labour market, most of them (36.4%) see the time period of *three and more years* as the most probable case. More optimistic views about that have another 22.7%, who see the period of *two years as more* possible. The respondents that see prospective resilience *within one year*, form 18.2% of the respondents, and others 9.1% are seeing the most possible case within *the next three years*. Unfortunately, 13.6% of the respondents are not seeing possible positive development of the tourism labour market after the pandemic at all.

Given the opportunity to evaluate the Bulgarian government's actions for overwhelming the negative impact of Covid-19 on the tourism industry, most of the former employees in the tourism industry recognised them as inaccurate (38 agree/strongly agree), incorrect (38 agree/strongly agree), inadequate (36 agree/strongly agree) and delayed (34). The expectations of how the pandemic is going to impact the future patterns of the tourism labour market from the point of view of former tourism employees are also not optimistic. They mostly valued that there would be an outflow from experienced and qualified workers from the tourism industry (58 agree/strongly agree) and there would be great relaunchment from the tourism industry to other industries (70 agree/strongly agree). Forty-two of them agree or strongly agree with the statement that in the future *there would be unwillingness for young people to study tourism*, other 50 agree or strongly agree that perceptively in the tourism industry wages would keep low levels which would lead to *great absence of qualified employees in tourism* (54 agree/strongly agree) and respectively *low quality of service* (50 agree/strongly agree).

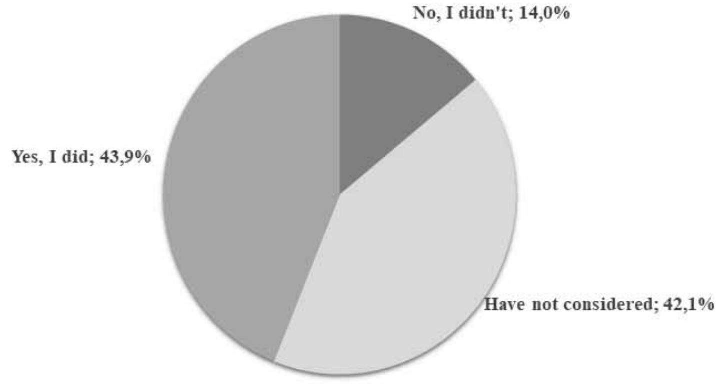
One hundred eighteen of the respondents who participated in the survey are current workers in the tourism industry. Of these, 50.8% declared that they work on a year-round basis in the tourism industry and 49.2% of them are employed as seasonal workers.

One of the recurring questions in the last two sections is aiming to compare the time period when changes in the working environment occurred after Covid-19 between former and current employees. From all current employees, 34 indicated there was *no reduction in salary*, but others 36 claimed the restriction was made in the first 3 months. No *unpaid leave* was pointed out by 42 of the respondents, but 20 of them selected that the restriction occurred in the first 3 months after the pandemic. *Extended working hours* were not also the case for most of the respondents – 56 respondents, but it happened by 48 of them in the first quarter after the pandemic.

Taking into consideration that working with clients in direct contact through a pandemic is working in a risky environment, 94.6% of the current employees did not receive additional benefits for that. Asked if they have been considering leaving the tourism industry after Covid-19, 43.9% declared they have. Optimistically, 42.1% categorically stated that they have not been considering such an option and the other 14% remained neutral. For those, who have considered leaving the tourism industry after the pandemic, the main reasons for that are the uncertainty of the working position due to Covid-19 (34), unjustifiably low salary against unjustifiably high risk (28) and the lack of perspective for professional development because of the unknown future of tourism after Covid-19.

Figure 8

Current employees' considerations about leaving the tourism industry after the Covid-19 pandemic



Taking into consideration the reasons for remaining employed in the tourism industry, the respondents highlight number of reasons – their *experience in the tourism field* (66), the working process due to *intense communication with a different types of cultures* (56), their *qualification in tourism* (54), *the satisfaction* of the type of the work (52), the *teamwork* (50).

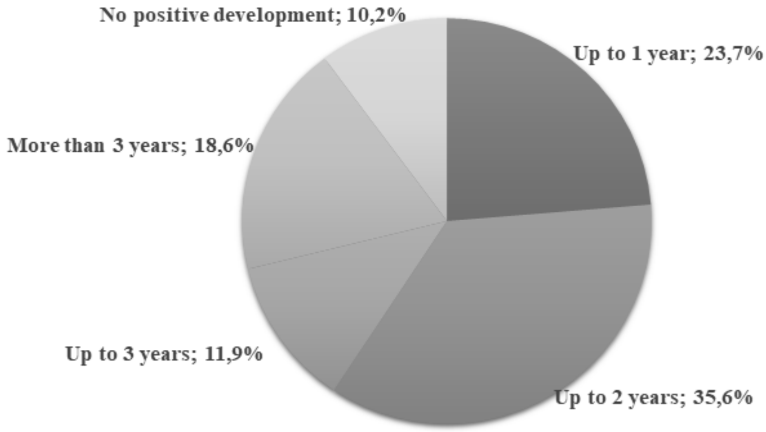
In conjunction with their opinion about the time perspective for tourism resilience, most of the respondents (35.6%) see the time period of *two years* as most possible case. More optimistic views about that have another 23.7% – *one year* as more possible. The respondents that see the prospective tourism resilience within *more than 3 years* form 18.6% of the respondents, and others 11.9% are seeing the most possible resilience *within the next three years*. Unfortunately, 10.2% of the respondents are not seeing possible positive tourism development after the pandemic at all.

The evaluation of the Bulgarian government's actions for overwhelming the negative impact of Covid-19 on the tourism industry from a current employee view, most of them recognised them as inaccurate (50 agree/strongly agree), incorrect (42 agree/strongly agree), inadequate (42 agree/strongly agree) and delayed (44 agree/strongly agree).

Given the opportunity to share their expectations of how the pandemic is going to impact the future patterns of the tourism labour market, the respondents are not optimistic. They mostly valued that there would be an outflow from experienced and qualified workers from the tourism industry (68 agree/strongly agree) and there would be great relaunchment from the tourism industry to other industries (76 agree/strongly agree). Fifty-eight of the respondents agree or strongly agree with the statement that in the future there would be *unwillingness for young people to study tourism*, other 52 agree or strongly agree that perceptively in the tourism industry wages would keep low levels which would lead to *great absence of qualified employees* in tourism (60 agree/strongly agree) and respectively *low quality of service (*66 agree/strongly agree).

Figure 9

Current employees' opinion in the tourism industry about tourism resilience perspective



6. Conclusions and Recommendations. Suggestions for Minimising the Negative Consequences

6.1. Conclusions and recommendations from the employer's point of view

After the conducted study among the employers in the tourism industry, the following main conclusions and recommendations can be highlighted as most important:

- The pandemic made employers in the tourism industry work to retain their employees. However, almost half of the respondents (52%) fail to cope with the pandemic pressure on tourism organisations and release people;
- There is a lack of a comprehensive public image and a clear opinion toward the state's policy against Covid-19 influence in the tourism sector in Bulgaria. The state policy regarding the support of the tourism enterprises after Covid-19 is defined by the employers as "incorrect";
- The decline in tourism companies' turnover after the Covid-19 pandemic is over 50%, which makes the specific effects of the pandemic on the tourism sector dramatic. This also corresponds with the international drop (as pointed on paragraph 2);
- A leading problem in hiring new employees in tourism companies is "finding them difficult". Contrary to the above, employers do not accept the "import of staff in tourism", which means that the outflow of staff from tourism because of the pandemic failed to reverse these employers' point of view;
- Therefore, urgent changes against the negative effects of the pandemic in tourism concerning those employed are needed. Exemplary highlights are: government policy in this area; the issuance of urgent government measures directly aimed at those employed

in tourism; the promotion of permanent employment in tourism, supported by a clear long-term vision; plans and strategies for training, development and motivation of staff in tourism during the pandemic; changing the image of the employer in tourism until it becomes a symbol of trust, security, and self-confidence etc. This all will correspond to the European process of generating a common recovery strategy in tourism (as pointed on paragraph 2);

- It is extremely important to work on strengthening the connection between business, higher education and secondary schools, preparing young workers for tourism facing the new patterns of the industry. These opportunities are very underdeveloped and, in such a connection, have significant potential that remains untapped. Young people should be prepared to work in the new tourism conditions after the pandemic. Opportunities are related to concluding contracts, developing joint curricula, developing internship programs, exchanging, determining scholarships and more;
- The study showed that government support does not play a leading role in retaining and motivating tourism employees during the pandemic from the employer's point of view. The Bulgarian government should rethink the measures of state policy in this direction, so that they really contribute to the affected industry and those employed in it;
- The Covid-19 pandemic was ranked last by employers (34%) as a reason for the outflow of employees from the tourism sector. This gives us the feedback to confirm that the pandemic doesn't have a great influence on labour outflow from tourism from an employer's point of view. This result shows us that the problem with the staff in tourism has deep roots, but the Covid-19 pandemic appears as an activator for labour outflow in tourism. This calls for urgent measures based on cooperation between tourism stakeholders with the main aim of attracting and retaining a skilled and experienced workforce in perspective.

6.2. Conclusions and recommendations from the former employee's point of view.

After the conducted study among former employees in the tourism industry, the following main conclusions and recommendations can be highlighted as most important:

- Most of the former workers voluntarily left their job and only one-third of them was involuntarily released, which shows us more psychologically based than the economic basis of the situation on the tourism labour market in Bulgaria due to Covid-19. Most of the participants (51%) are not professionally engaged in the tourism industry from the beginning of the pandemic, which can be determined as a proactive protective action. We can assume that the pandemic definitely had a strong influence on workers in tourism to leave their jobs so that they can protect their lives, which is emotionally rather than factually based (as pointed on paragraph 3.3.).
- The reasons for not working in the tourism industry are more traditionally based than directly connected with Covid-19. Low income and irregular working hours have always been announced as some of the most negative sides of employment in tourism. Only the absence of professional development opportunities and the uncertainty could be

connected with the pandemic situation. From our point of view, the participants link the particular negative sides of working in tourism but don`t evaluate the fact that they left their job when Covid-19 has appeared, making the pandemic the main reason for the great outflow of labour from the industry through the last years.

- 80% and more indicate reduced salary, unpaid leave and extended working hours that occurred in the first quarter of the pandemic at their workplace. This gives us an idea of the type of the employer's attitude from the employee's perspective during pandemic – proactive. Before experiencing economic, financial and other difficulties, the employers prefer to apply all possible restrictions to avoid possible involvements.

- One of the practically most important questions in this section is giving us information about the top receptive industries for transferring human resources from the tourism industry. Among these leaders are the IT industry, the retail industry and business process outsourcing (call centres) but also a wide range of business sectors was given. This confirms the suggestion that workers in the tourism industry acquire a wide range of skills, which makes them easily transferable in times of crisis (as pointed on paragraph 3). The main question remains how to keep them or return them after the pandemic, which will be the biggest challenge in the tourism industry through the next few years.

- Arising from the previous conclusion, less than half of the participants (47.5%) would like to return to work in tourism. More than one-third is definitely denying to have such intentions. This shows us that the pandemic caused a severe impact on employers in their value perception about working in tourism. These results we recognise as disturbing, taking into consideration that the leakage of experienced and qualified workers from tourism is not going to be recovered. The main reasons for those considering returning to work in tourism are the nature of work, the job satisfaction and the experience they have gained through the years, which are again more emotional than economic reasons.

- In conjunction with the future of tourism and the possible resilience of the industry, the former workers are pessimistic, taking in consideration that more than one-third (36.4%) are seeing possible recovery of the industry after more than 3 years and another 13.6% are not seeing such at all. The pandemic made tourism employees not only leave the industry, but also not see a perspective in well-being in it.

- Toward the evaluation of the Bulgarian government's actions for overwhelming the negative impacts of the pandemic on the tourism industry, the former employees generally have a negative attitude. They evaluate them as inaccurate, incorrect, delayed, unverified and incorrect. This shows us once again that government support does not play a leading role in retaining and motivating tourism employees during the pandemic. This gives us the belief that the pandemic revealed the time for tourism employers to understand that they are the main figures for staff retention and motivation – government support could only play a supporting role, but when developed and coordinated with the tourism enterprises.

- The expectations of the former employees of the future patterns of the tourism labour market are also not positive. The respondents think that the outflow of experienced and qualified workers will continue and as a result of the great absence of qualified workers, low quality of the tourism service will be observed. As a specific effect of the pandemic, inevitably, this would lead to lower prices of tourism services, lower income for tourism enterprises and lower wages for tourism employees.

6.3. Conclusions and recommendations from the current employee's point of view

After the conducted study among the current employees in the tourism industry, the following main conclusions and recommendations can be highlighted as most important:

- To the current employees in the tourism industry, the situation with the changing working environment after Covid-19 is quite different. As opposed to former employees, in most cases by them, there were no reduction in salary and no unpaid leave after Covid-19 occurred. However, cases with extended working hours and consolidation of working positions were indicated. The information led us to the conclusion that the pandemic put employees in tourism to make compromises with their working environment because of the uncertainty of the external conditions.
- Given the fact that most positions in the tourism industry include intensive direct contact with clients, the pandemic makes it risky. However, almost 95% of the current employees did not receive any additional benefits for that. Given the attention that most enterprises cut the number of employees, we doubt that there were no such possibilities. Negatively, almost half of the respondents have been considering leaving the tourism industry after Covid-19 because of the risky working environment. The pandemic made employers overthink their future in tourism because of the great health risk for them. Unfortunately, employers don't consider this fact and refuse to perform motivating practices to retain them.
- The main reasons for remaining employed in the tourism industry for the respondents are their experience in the tourism field, the type of working process, job satisfaction and teamwork. Once again, we observe emotionally rather than economically based reasons, which confirms the statement that the pandemic made the tourism labour market participants' behaviour more psychologically driven.
- The time perspective for tourism resilience, most of the current employees see slightly more positive than the former ones. For most of them, the most expected time period is within the next two years and almost one-quarter of the respondents see the possible resilience within one year. Tourism is performing O'Brien and Hope's perception of resilience and is seeking out opportunities that have arisen during the pandemic. We believe that the adaptation to the new terms and conditions, the fallout of the inefficient agents and the creation of modern sustainable business models are to be observed in future.
- The evaluation of the Bulgarian government's actions against the negative impact of the pandemic on the tourism industry by the current employees is not very different from the former employee's opinion. This statement leads us to the thought that government actions weren't developed and introduced in cooperation with tourism enterprises.

Though, in a pandemic situation, this lapse is causing not only disappointment but also a negative attitude toward the whole industry and its future resilience perspectives.

- As given the opportunity to share their expectations on how the pandemic is going to impact the future patterns of the tourism labour market, the current employees in tourism, such as the former one, are not optimistic. From their point of view, there will be continuing outflow of experienced workers from tourism and a great relaunchment of human resources to other industries, which will result in the unwillingness of young people to study tourism and work in the tourism industry, which will result in low quality of tourism services. Once again, the statement that the pandemic caused severe and significant specific effects on tourism is confirmed. To fight against that ongoing negative process, the respondents do not see possible new effective government policy toward human resources in tourism, which once again stresses on the importance of exciting coordinated actions between government, business and non-governmental organisations.

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