

IMPACTS OF COVID-19 ON INDIAN TOURISM SECTOR

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ABSTRACT

Tourism is obviously a human activity so the socio-economic changes, cultural background, traditional behaviour and healthy rituals and well being of human society affect it locally as well as globally. In history, the tourism was globally affected by human factors, such as both the world wars, the Spanish influenza and Tsunami etc. But recently, in Wuhan (China) in December 2019, first reported a severe respiratory illness which was identified as SARS - COV - 2 or Severe Acute Respiratory Syndrome or COVID-19. The illness is caused by a virus named Novel corona virus. The illness spread rapidly all over the world while in India it was first reported on February 3, 2020 in Kerala. The illness turned into a pandemic very soon and affected all the sectors of human society. Even the tourism sector could not remain untouched from the effects of COVID-19 pandemic. This study or research paper is about the economic impacts on the tourism sector in India due to the pandemic. It is the common nature of a pandemic that it affects almost whole lifestyle and socio-economic structure of human society deeply and vastly. The pandemic is still going on as the last stage of second wave and there is a strong possibility of occurring the third wave. So, there are very few research works on such a topic. It is the call of the hour to conduct such a research to expose the economic impacts of the pandemic on the Indian tourism sector so that the plan for its revival can be made timely. The study is exigent in present scenario. The study is aimed to identify the challenges and impacts during the pandemic period. It is necessary for the the Union Government as well as for the State Governments to handle such impacts for the well-being of tourism sector in India. The impacts are affecting the sector both directly and indirectly. Only the recognition of such impacts can lead the concerning government to revive the tourism, travel and hospitality industries again. The whole study is conducted through secondary data collection. The main findings of the study indicate that the tourism sector is almost collapsed due to the global crisis of COVID-19 pandemic. All the required major standards for strengthening the sector have been devastated during both the lockdowns. The research can be a path finding torch for governments to step ahead for rebuilding the tourism sector not only from micro to macro level but from grassroot to paramount level also.

Keywords: Covid-19, FTA, FEE, NCAER, Job Loss, Occupancy Rate, WFA, Revenge Travels, Emergency Time Reserve Fund (ETRF).

Introduction

COVID -19 has been affecting drastically the whole world in almost every walk of the human life for last one and a half year. The human society, economy, culture, environment, human emotions and even international relations are appallingly affected by the pandemic. The global tourism and travel industry has also been plummeting since the beginning of lockdown. Since India has great opportunities of tourism because it has plenty of tourist sites and rich heritage wealth which attract tourists much so the pandemic affected dreadfully its economy. So, it has been studied that in what manner the pandemic has affected the Indian tourism sector economically. Our aim is to do a deep study to identify the challenges and economic impacts of the pandemic on the Indian tourism sector. It is very significant to recognise obviously the challenges and the bad economic impacts to rebuild and to revive the sector for the well being of the economy. The study will lead the nation to face the present day scenario and to prepare a

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roadmap in the future perspective and planning. Today the governments (Union as well as State governments) have an urgent need for such studies. The study is absolutely relevant and fulfilling the call of the day. The study has been conducted through secondary data from suitable and reliable resources, such as - previous studies, journals, reports, periodicals, websites and daily newspapers etc. The central question of the research is to identify the economic impacts of COVID-19 on the Indian tourism sector. The study analyses the present situation in the proper regard to the Indian economy. The impacts are mainly of three categories - firstly, falling rate of travellers, secondly, falling in earnings and jobs and thirdly, falling in the volume of business and exports. There are some other minor impacts which are also discussed analytically. These impacts are the consequences of the pandemic directly and indirectly. The research paper develops and presents the details in a systematic and reasonable manner. It shows the importance of tourism sector in global economy as well as in the Indian perspective. It also presents the nature and forms of the tourism sector in India. The major impacts which have directly affected the tourism industry are discussed intensively. Tourism industry includes travel services, hospitality services and business or export market. So, these areas are naturally in the circumference of the study. The job loss due to the pandemic in the Indian tourism sector is another major impact which has caused poverty, inequality and unemployment in the economy. The traveling and hospitality companies along with other stakeholders are facing insurance issues, debts and delayed payment problems which make them to quit the placements and also the sector. The sectorial migration in the economy has become very common thing recently. The study reveals that there has not been availed any proper aid by the governments to the sector for recovering some loss due to the pandemic. So, the situation is becoming worse and worse now-a-days. The governments have issued Standard Operating Procedures (SOPs) time to time for the sector as the safety measures so the costs of tourism products or services are becoming higher and higher. The hike in the costs of tourism services and products has resulted into the drastically falling of the tourists arrivals. The study analyses all the possible economic impacts at 360°.

Objective and Hypothesis

The objective of this research paper is to identify and study the economic causes and challenges which are responsible for the downfall of the Indian Tourism Sector.

The hypothesis of this research paper is "COVID-19 pandemic outbreak is responsible for the recent economic downfall in the Indian tourism sector."

Importance and Contribution of Tourism Sector in the Indian Economy

Indian diversity attracts tourists from every corner of the earth. It is only country where tourists can enjoy all kinds of tourism together for example wildlife tourism, adventure tourism, cultural tourism, religious tourism, eco tourism, health Tourism, heritage tourism and many more other types of tourism. Tourism in India has notable potential varieties of rich cultural and historical heritage, ecological variations, terrains and natural beauty spread all over the country. The sector is a great employment generating and also a significant source of foreign exchange for the economy. In 2019 FEEs (Foreign Exchange Earnings) were US\$ 29.96 billion registering a growth of 4.8 % year-on-year and reached US\$ 5.40 billion during January - February 2020. Indian tourism market can be represented in following data table.

Year	International Tourists Arrival (million)	International Tourists Receipts (US\$ billions)	Domestic Tourists Arrival (million)	Domestic Visitors Spending US\$ billion)	Total Contribution to GDP (US\$ billion)	Total Contribution to Employment (million)
2010	5.78	14.49	747.70	111.66	141.07	29.23
2011	6.31	17.70	864.53	118.65	152.39	29.59
2012	6.58	17.97	1045.05	112.26	145.62	30.24
2013	6.97	18.39	1142.53	109.18	143.07	30.99
2014	13.11	19.70	1282.80	110.02	145.86	33.46
2015	13.76	21.01	1431.97	108.63	144.86	35.80
2016	15.03	22.92	1615.39	116.23	155.02	36.56
2017	16.81	27.31	1657.55	129.99	175.61	37.68
2018	17.42	28.58	1854.93	137.78	186.12	38.57
2019	17.90	30.30	2321.98	143.19	194.29	39.82

Source : UNWTO reports.

The table shows that during 2010 to 2019 there is a positive growth in the tourism sector its total contribution to GDP and to employment creation are increasing noteworthy. Total contribution to GDP and real contribution to employment average growth rates are 3.77 % and 3.62 % respectively. During these 10 years International Tourist Arrivals increased from 5.78 million to 17.90 million with the growth of almost more than 200 %. In the same way International Tourism Receipts increased to US\$ 30.30 billion which is more than 2 times of global tourism receipt of the year 2010. Even, Domestic tourists arrival has 210.54 % growth during these 10 years. The Domestic Tourists Spendings has faced some fluctuations during these 10 years but overall growth of 65.20 % has been noted. So, we can conclude that the tourism sector in Indian economy has been growing incessantly. The World Travel and Tourism Council (WTTC) has studied Indian tourism sector's role and rank in global perspective in 2019. The abstracts of the study are presented here in the following table.

Factor	Contribution	Ranking
International Tourists Arrivals	17.90 million	23
International Tourists Receipts	US\$ 3030 billion	12
Domestic Tourists Arrivals	2321.98 million	Not prepared by WTTC
Domestic Visitors Spending	US\$ 143.20 billion	8
Total Contribution to GDP	US\$194.30 billion	10
Total Contribution to Employment	39.82 million	2

Source : WTTC report.

The table reflects that the Indian tourism sector's employment contribution is really amazing with 39.82 million with second rank in the world economy. India's Domestic visitors spend much more money on tourism than most of other countries' Domestic visitors and stands at eighth rank in the world. In the Contribution to GDP from tourism industry India stands at 10th rank in the global economy. It is obvious that Indian tourism sector has an advantageous and effective position in the worldwide perspective.

Economic Impacts of Covid-19 on Indian Tourism Sector

The tourism sector has been a high esteemed sector in Indian economy. It has also been achieved high ranked position in the global economy. But COVID-19 pandemic has brought it down with adverse effects. The pandemic has affected it from micro to macro level negatively. There are so many economic impacts of the pandemic on the Indian tourism sector which have affected it directly and indirectly. Indian tourism sector's main services are travelling, hospitality, site visiting and exporting etc. These all services have miserably been affected. The whole chain of tourism and stakeholders are unable to understand the proper solution of the loss made by the pandemic because insecurity, instability and uncertainty still exist in the sector.

Economic Impacts on Travelling Services

In the perspective of Indian tourism there are three mostly engaged travelling services - airways, railways and roadways. Due to the COVID-19 pandemic India had to declare country wide lockdowns. During both the waves, the lockdowns adversely affected the connectivity to the tourist sites, revenue collections from travelling services and total turnover of travelling companies.

Most of the foreign tourists use Civil Aviation service but during pandemic this service was closed. Not only international flights but also domestic flights were cancelled and closed. According to the Ministry of Civil Aviation of India there has been 25% to 30% drop in inbound international visitors to the country due to the pandemic.

Passengers Seat Capacity of Civil Aviation Companies in India

Month	Capacity Changed from Originally Planned	Change in Percent
Jan. 2020	-10342	0
Feb. 2020	-116823	-2
March 2020	-2077578	-29
April 2020	-60286458	-89

In this table it is depicted that Indian Civil Aviation has faced a great fall in the total capacity of passengers from January 2020 to April 2020. There was a great drop in the total travelled passengers due to restrictions on international flights. The Foreign Travellers Arrival (FTA) got downfall. There are some comparative data to show the downfall in FTAs.

- A

From	To	Growth in FTAs
Jan. - May 2018	Jan - May 2019	2%
Jan. - May 2019	Jan - May 2020	-46%
Jan. - May 2020	Jan - May 2021	-84%

- B

Month	FTAs
Nov. 2020	70971
Dec. 2020	90544
April 2021	69442
May 2021	13307

It means that there has been a great fall of 84% during January to May 2021 which indicates an obvious impact of COVID-19's second wave. In the concluding period of the first wave of COVID-19 the FTAs were increasing while in the beginning of the second wave FTAs witnessed a great fall. According to UNWTO (United Nation World Tourism Organisation) International Tourist Arrivals (overnight visitors) fell by 72% in January to December 2020 compared to the same period in 2019. In a publication of the Ministry of Tourism, Government of India FTA has been found to be down caused by about 67% yearly in the January to March while local tourists notched a much lower figure by about 40%. FTA in February 2020 has dropped by 9.3 % month-on-month and 7% year-on-year. So, the situation has been crucial.

Most of the domestic tourists travel by roadways and railways. Most of the states had sealed their boundaries and suspended roadways services. The Railways service was also closed due to the crisis. Both the waves of COVID-19 began just before the peak season (summer season) for domestic tourists. The domestic travel companies faced more than 30% drop in 2020 compared with the previous year's season. The economic downfall in the travelling services is occurred due to the outbreak of COVID-19 pandemic.

Economic Effects on Hospitality Services

In tourism management hospitality service means a friendly, welcoming behaviour towards tourists. It includes accommodation food drink and entertainment etc. During both the lockdowns the hospitality services were strictly restricted. Hospitality service companies witnessed 50% drop in booking in India between March 2 and 9 in 2020. Not only tariffs but occupancies also badly affected in March to June 2020. In cities most of the hotels and in towns most of the inns were engaged as quarantine centres. Most of the restaurants and lodgings remained closed during the lockdowns and after unlocking them the operating costs became higher due to social distancing, sanitization, sanitation, hygiene related and other safety spendings. The hospitality services are labour intensive. During the lockdowns almost all the manpower went to their native places and after unlocking they remained there. So, there remained lack of the manpower in hotels and restaurants. Now this service sector is facing NPA problem too much. Most of the medium class hospitality business have been shut down due to NPAs. A report by Hotelivate says that FY-22 will see a hike of mere 18.9 % nationwide occupancy compared to FY-21 which closed books on March 31, 2021 with only 33.8 percent hotel rooms occupied. This shows de-growth in hospitality services.

According to Naukri.com there was a decline of 11% in hiring manpower in March 2021 compared to March 2020 in the hospitality and travel sectors. In this way it can be stated that outbreak of COVID-19 is responsible for the recent economic downfall in the hospitality services in the Indian tourism sector.

Loss in Revenue Collection and Falling of Foreign Exchange Earnings (FEEs)

Lockdowns affected miserably both revenue collections and Foreign Exchange Earnings (FEEs). During the period of April to September 2020 the travel and tourism companies earned Rs. 7795.41 crore revenue which was less than the earned revenue during the same period in 2019 which was Rs. 31431.68 crore. Thus, the loss of the revenue earned by the companies was Rupees 23636.30 crore. The tourism sector is the most revenue generating sector but due to the Coronavirus crisis it faced too much negative effects.

Comparison of Tourism Loss during April - Dec. (2019 - 2020)

Month	2019	2020	Difference	Percentage loss
April	774651	470	774181	99.94
May	615136	1329	613807	99.78
June	726446	4480	721966	99.38
July	818125	6503	811622	99.21
August	800837	11619	789218	98.55
September	751513	18469	733044	97.54
October	945017	30917	914100	96.73
November	1092440	60156	1032284	94.49
December	1226398	79910	1146488	93.48

According to Tourism Ministry, Government of India there occurred a great loss in Foreign Exchange Earnings due to the restrictions on tourism, travelling and hospitality services. The Ministry reported that during January to December 2020 there was 76.3 % less Foreign Exchange Earnings in India in the comparison of the same period in 2019. The reduction of the Companies' Profit After Tax (PAT) is also the impact of COVID-19 pandemic.

Profit after Tax (PAT) in Crore Rupees

Year	Q-1	Q-2
2019	(+)1642.81	(+)1231.71
2020	(-)4162.28	(-)1661.05
Profit/Loss	(-)253.36	(-)134.86

It is obvious that tourism and travelling companies faced almost unbearable loss due to the pandemic. This loss reflected in the decreasing Earning Per Share (EPS) in Q-1 of year 2020 at Rupees 138.17 negatively while in Q-2 in the same year it reduced to Rupees 74.04 negatively. The negative EPS is almost irrepairable in the near future. On the basis of these facts it can be concluded that the falling in FEEs and decreasing in revenue collections in the Indian tourism sector are the results of COVID-19 pandemic.

Job Loss in Tourism Sector

Tourism sector is a major source of employment in many states and union territories in India. The Indian tourism sector has created about 87.5 million jobs with 12.75% of total employment thereby contributing INR 194 billion to GDP (WTTTC, 2018). The sector witnessed 3.2% growth from 2018. COVID-19 outbreak broke the backbone of the tourism industry across the country causing massive loss in employment to 38 million people associated with the industry. According to National Council of Applied Economic Research (NCAER) in the Q-1 of year 2020 - 21 14.5 million job loss was recorded in the tourism sector while in the Q-2 it reduced and stood at 5.2 million job loss. In the Q-3 1.8 million jobs were lost due to the pandemic. So up to Q-3 about 2.1 crore jobs were lost. Really, it was a horrible situation for the sector as well as the whole economy. Obviously, the outbreak of COVID-19 pandemic has caused the unemployment and jobloss in the Indian tourism sector.

Indirect Economic Impacts

Above mentioned economic impacts are absolutely negative and backbone breaking for the tourism sector. Transportation is the lifeblood which keeps tourism sector alive but due to the pandemic the sector suffered anaemia of the 'footfalls' of tourists. Even, hospitality services needed to cure intensively. They were totally sick of 'no footfalls'. The tank of revenue became dried due to the drought of tourists. The stakeholders were unemployed and jobless. Consquently, lower and medium class stakeholders had to leave and migrate from the sector to find their new means of livelihood. The pandemic created chaos everywhere. There are a lot of indirect economic impacts of COVID-19 crisis on tourism as well as on the Indian economy. Incessantly falling GDP quarter by quarter is the clear sign of expanding poverty from micro to macro level in an economy. Such a trend of poverty has been traced in Indian economy. The poverty has created inequality among lower, medium and upper class stakeholders. Even, there are some cases where large turnover tourism, travelling and hospitality companies have devoured small companies. This situation is too much troubling and is not the sign of a healthy economy. The 'no relief policy' of the government for tourism sector has generated the question of existence before the struggling companies. The tourism sector is facing the low turnover problem. The tourists are not reaching at their destination due to the pandemic fear, insecurity and worldwide shortage of cashflow.

The sector is facing insurance issues also. The companies cannot pay their insurance premiums at right time and also suffering from longterm and shortterm debts. The loan EMIs have been due for the lack of enough cashflow or income. Even, the benefits of loan moratorium has not reached to the companies ends properly. The manpower is not appearing at the job due to insecure future. So, the labour cost has raised too much and almost unbearable. The companies are facing the problem of non-payments and delayed payments due to the lack of turnover during both the lockdowns. All the stakeholders are under an unmanageable pressure of due payments. The tourism industry, hospitality and travelling services have the great obstacle of negative or decreasing occupancy rate. The hotel rooms and restaurant tables are free from customers. There is no traffic on booking sites of tours and travels companies, hotels and restaurants. The companies are also facing problem of no occupancy. All the future commitments of the stakeholders have proved null and void due to the COVID-19 crisis. The whole sector has been demolished and there is no chance to resettle properly in the near future. All of the above mentioned indirect economic impacts on the Indian tourism sector are the outcome of the COVID-19 pandemic.

Miscellaneous Economic and Socio-Economic Impacts

A pandemic is an epidemic of an infectious disease that has spread across a large region for instance multiple continents or worldwide, effecting a substantial number of people. The effects of a pandemic are worldwide and multidimensional and last for a long time, mostly for two and half to three years. There are so many miscellaneous economic and socio- economic effects of the pandemic on the tourism sector. The costs of tourism, travelling and hospitality services have been increased due to new safety and hygiene measures, such as social distancing, sanitizers and masks etc. The restaurants, hotel rooms and buses are conducted with half occupancy out of their total capacity. New safety rules and new standards in the tourism industry are introduced which are costly but good for everybody. There has introduced a new work culture in the lockdowns that is 'Work From Anywhere' (WFA). It is very helpful in the portability of manpower and it can decrease the costs of fixed charges of an office such as rent, electricity, Wi-Fi, furniture and maintenance etc. Even, WFA trend can boost up the tourism among service class tourists in working days. It is good for the sector. The tourism sector has witnessed 'sectorial migration' of resources in the Indian economy. The People have quitted the tourism sector and migrated to other economic sectors to keep up their livelihood. This trend will affect the sector too much adversely in the forthcoming time and will be the cause of raising the costs of resources. The tourism sector has been the major contribution of FTAs but now-a-days it depends on the DTAs or Domestic Travellers Arrivals. It has been centred on the domestic tourists. The tourism companies are paying much importance to the domestic tourists. This changed trend will be a master key to reshape the new roadmap according to the future perspective of tourism industry. So, undoubtedly it is a proved fact that COVID-19 pandemic is responsible for the recent economic downfall in the Indian tourism sector. Therefore, the tourism policy of different governments should be rebuilt in a new economic scenario for the survival of the sector in the changed global and local circumstances. There is emerging a new trend of tourism 'Revenge travel', means the travel which refers to visit the less explored destination after the extended period of lockdown, for the sake of safety and being away from crowd. The companies are preparing and availing amazing packages for the Revenge Travels in these days. There will occur some new trends in the managerial, strategical, and developmental and policy-matter related areas in the Indian economy. The pandemic has transformed much more the nature, scopes, trends, limitations and economic culture of the tourism sector in India. The outbreak of COVID-19 pandemic has affected much the Indian tourism sector economically in recent time.

Conclusion

Infact, COVID-19 pandemic has proved that the economic stability of the Indian tourism sector is not permanent in the regard to such catastrophic time. Not a single service or market of tourism has remained safe from the pandemic. All the standards and achievements of the Indian economy have been destroyed during the crisis. All the stakeholders, entrepreneurs and companies have become demoralized and hard to stable due to the crisis. This research proves that the tourism sector demounted from paramount to ground level. The research has clearly identified the economic impacts of COVID-19 pandemic on the Indian tourism sector. The impacts affected the sector alongwith the whole economy from micro to macro level. The consequences of the research indicate that all the chief three aspects of tourism - traveling , hospitality and export market have reached dreadfully at the lowest level in generating income and jobs. The downfalls in GDP, FTAs, DTAs, FEEs, occupancies and employments have broken the backbone of the Indian tourism sector. The destruction of the Indian tourism sector raises many questions to study the future perspective of the sector. The first and foremost question is to revive and rebuild the tourism sector. The strategies for marketing and development of the sector are to

be considered deeply. The new trends, new standards and new economic environment are great challenges before the sector. The policy makers, economists, managers, entrepreneurs and related think tanks will have to redesign the sector according to newly emerging challenges and also for the needs of the future of the sector. The sector must have an Emergency Time Reserve Fund (ETRF) for the protection from adverse situations like - job loss, deficit, economic recession and scarcity of enough turnover. The fund will be supportive and beneficial in covering risks of uncertainties of the sector whether they are economic or financial. The government should be much sensitive to the sectorial stakeholders in releasing economic reliefs. The Union government and the State governments should come ahead to reconstruct the tourism policy. It should have the features of being pro-stakeholders, increasing Domestic Tourists Arrivals and applying all the measures of safety, hygiene and security. The research underlines the hidden drawbacks of the Indian tourism sector which resulted in instability and destruction of the sector. It can be firmly stated as the bottom line that the outbreak of COVID-19 pandemic has ruined the Indian tourism sector economically. In a nutshell it can be stated that the economic impacts of COVID-19 on Indian tourism sector will lead, us to a new scenario for rebuilding the sector with much carefulness, reasonability and future possibilities.

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