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TOURISM MITIGATION STRATEGIES AMID COVID-19 IN OIC COUNTRIES



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TOURISM MITIGATION STRATEGIES AMID COVID-19 IN OIC COUNTRIES

EXECUTIVE SUMMARY

There is a wide consensus that the tourism and travel industry is largely vulnerable to crises regardless of their types. Tourist flows and inherently tourism receipts can be largely affected by a wide range of crises including political tensions, disasters (both man-made and natural), epidemics, and terror attacks. Broadly speaking, previous crises had regional short-term impacts and their global effect on tourism was relatively limited. The crises and their effects on tourism have raised the need for knowledge-based crisis management that can help tourism destinations as well as tourism businesses respond to crises and recover from potential negative consequences. Understanding key measures that can be taken by destinations as well as firms before, during and after crises might result in a more efficient design of crisis response systems, strategies and their implementation. Given that risk management and crisis prevention are generally neglected, governments' role in containing the impacts of crises and managing recovery is of significant importance.

While there have always been different types of crises influencing travel demand in local, regional or international scale, few would disagree that epidemics have been among the key crises that have had observed effects on the tourism and travel industry. With the beginning of the millennium, SARS forced several countries to impose travel restrictions especially to/from China and Hong Kong. In a short period of time, the virus spread to Southeast Asia and then to other parts of the world. SARS resulted in a notable drop in international tourism arrivals with several economies suffering significant economic loss including China, Singapore, Malaysia, Thailand, and Indonesia. Around one decade after the outbreak of SARS, a new disease known as MERS was observed in Saudi Arabia, a key destination for millions of Muslim pilgrims. The spread of the epidemic increased after the return of millions of pilgrims from Saudi Arabia to their home countries. With confirmed cases in several countries including Germany, Greece, France, and Malaysia, MERS had notable impacts on tourism arrivals and inherently tourism revenues.

Unlike SARS and MERS. Covid-19 has become a global crisis with a much faster and broader spread. Since the WHO announced Covid-19 as a pandemic in March 2020, the number

of countries that have significantly interfered with international air traffic and implemented additional health measures have increased. The widespread of the virus has created a global panic leading to global shutdown of travel, businesses and leisure activities. Historically, travelling was a core factor in facilitating the spread of contagious diseases, and thus border closures and quarantine measures were typically among the common responses to control the spread of the virus and mitigate its potential effects. Following the outbreak of Covid-19, travel restrictions and the lockdown orders have turned many tourism destinations into ghost towns while also causing major harm to small and medium-sized tourism businesses resulting in sudden growth in unemployment rates all over the world. In fact, international travel has experienced a sharp decline starting from April (-97%), May (-96%) and June 2020 (-91%). In total global tourism arrivals experienced a 73% decline in 2020. There also exist several scenarios predicting recovery by mid-2023 and others expecting recovery by 2024. Under the worst scenario, it is estimated that more than 197 million people worldwide may become unemployed in the tourism industry, which comprises approximately 10.3 % of the global GDP. The most affected sector of tourism is Meetings and Events (-67%), Travel Agencies and Tour Operators (-55%), Accommodation (-50%), Air travel (-47%), and Food & Beverage (-40%).

OIC member states have also experienced significant declines from 233 million arrivals in 2019 to 67 million arrivals in 2020. This corresponds to a 71% decrease compared to previous year. Tourism receipts were also down by 65% from 189 billion USD in 2019 to 66 billion USD in 2020. Destinations OIC-Asia region and Sub-Saharan Africa both suffered 75% decrease in tourist volume whereas OIC-MENA experienced a 61% decrease in arrivals.

During the pandemic, the government measures to reduce the spread of the virus focused on encouraging people to stay at home, cancelling or postponing large events, closing schools and universities, limiting mobility, enforcing mask wearing at public areas, reducing gatherings, requiring essential businesses to run skeletal operations and encouraging distant work. While apparently responsible to flatten the curve for Covid-19 and thus reducing burden on public health facilities, quarantines, travel restrictions, and social-distancing measures have resulted in a sharp fall in travel expenditure. Given the massive impacts of Covid-19 on the tourism and hospitality industry, it has become indispensable for governments and the private sector in several countries to respond with mitigation strategies that help tourism and hospitality businesses survive the crisis.

Few would disagree that governments are in a better position to handle crises and mitigate their impacts on tourism. Governments in various countries have taken different measures to cushion the economic costs of shutdown and mobility restrictions due to Covid-19. While some countries such as China, Vietnam, New Zealand and Australia were so harsh in their response to Covid-19 implementing immediate lockdown measures and targeting “zero” infection, others such as Turkey and Jordan attempted to flatten the curve for Covid-19 applying time- and place-limited lockdowns to keep their economies running. Few countries preferred relaxed measures targeting herd immunity. Even in these countries, tourism has suffered since such countries were often listed as unsafe destinations.

In response to the crisis and to help the tourism industry survive Covid-19, besides various legislative and operational measures such as safe tourism certifications governments have adopted various interventions ranging from tax holidays, financial incentives, fiscal measures, credit facilities to employment support and demand stimulation. Government responses to the crisis with relevance to the tourism industry might also be classified under direct and indirect interventions. Some of the indirect interventions (e.g., restrictions on mobility, capacity reductions) also created major setbacks for the tourism industry. The direct interventions (e.g. credit facilities) on the other hand targeted to relieve some of the specific stress on the industry (e.g., short-time work compensations, deferrals of payments) and stimulate tourism demand (e.g., holiday subventions to the domestic market, travel bubbles). It should be noted, however, that generic governmental support may be less effective when countries have significant informal economies which is the case for most OIC member countries. Government response strategies might also be viewed as short-term tactical responses (e.g., tax holidays) and long-term strategic responses (e.g., market diversification).

With regard to mitigation strategies by the private sector, businesses within the tourism and hospitality industry seem to adopt different strategies including targeting less risk-averse market segments, enforcing social distancing and capacity restrictions, implementing additional hygiene measures, offering unpaid leave, improving service quality, integrating ICT, reducing prices, limiting services, revisiting cancellation policies, focusing on local markets, creating safety image, extending credits, and postponing maintenance and investments.

It also has become apparent that crises may often give birth to opportunities. In this vein, crises affecting tourism may result in transformations and positive outcomes through the generation of new knowledge, relationships, and policy. Some destinations, for example, have

reduced their reliance on key markets, understood their vulnerability, recognized the importance of domestic tourism, increased government support and funding for tourism, invested in destination infra-structure, and developed new products, and tourism-related policies. In the post-Covid-19 era, the tourism industry is likely to experience various transformations such as increased cost per tourist because of social distancing, hygiene measures and other operational costs; reduced capacity, increased competition, utilization of ICT and AI technologies, and image building on safe destination branding. These will be advantages for destinations and tourism businesses that proactively respond to these opportunities.

The present report is based on a mixed-method approach drawing on four case study countries namely, Azerbaijan, Jordan, Malaysia, and Turkey. All four countries are OIC member countries located in different regions. The current report will present findings drawn from a qualitative study based on 23 interviews, a draft pilot quantitative data collected from 246 tourism experts and a detailed survey collected from nine countries concentrating on Azerbaijan, Jordan, Malaysia and Turkey including a total of 189 responses. Semi-structured interviews with tourism and hospitality industry's practitioners were conducted face-to-face (n= 13) and online (n= 10). Informants were asked a number of questions with the aim of understanding their experience with Covid-19 with focus on their survival strategies, and their perceptions of governmental interventions. The qualitative data were analyzed using a thematic content analysis approach.

Findings suggest that the Covid-19 pandemic has resulted in a major revenue loss stemming from both reduced demand and lockdown orders. Tourism experts from OIC estimated an average of 79% decline in revenues, 80% decline in the number of customers, 50% decline in the number of employees and 49% decrease in prices. The costs of the pandemic appear to go far beyond the economic damage with psychological distress and anxiety being common among informants who are faced with uncertainty about the future.

The study also identifies several organizational strategies that have been implemented by industry experts to mitigate the effects of the crisis. These strategies, in order of importance, were related to enhancing cleanliness and hygiene standards, market diversification, creating safety image, enhancing service quality, restructuring debts, and applying for financial support, offering new services, enhancing loyalty programs, enhancing travel insurance policies, increasing marketing efforts, relaxing cancellation policies, focusing on ICT and automation,

decreasing costs, postponing investments, investing in employee training, decreasing number of employees, merging with other organizations, investing on corporate social responsibility, decreasing prices, decreasing capacity, and liquidation.

Besides the industry mitigation strategies, government support and their effectiveness were also explored in the study. Overall, strategies developed by governments to reduce the negative impacts of the Covid-19 pandemic are generally limited to a set of short-term reactions oriented towards helping businesses offset their revenue loss and, in some cases, keeping a foot in the market despite damage. Based on the qualitative content analysis of interviews, government strategies were grouped under five different themes as; Subventions for enhancing demand(i), Financial Support(ii), Support for maintaining and developing workforce(iii), Legislative actions (iv), and Operational support (v). In the order of their importance; Operational support alternatives included vaccination priority of tourism staff, creating safe travel bubbles and tourism corridors, offering medical support services such as PCR tests, organizing the safe travel certificates, controlling for hygiene and capacity restrictions, advisory and information provision services for both tourists and organizations. Legislative Actions included introduction of vaccine passports, government guarantees on loans, delaying refunds to force major cancellations, and introducing holidays insurances.

Tax holidays and discounts for the tourism industry, rent support for buildings and land, deferrals of utility charges such as energy and water, subsidized credits, contributions for digitalization and automation costs, Seat support for flights, Advance public purchase of tourism services such as flights and lodging services, application of a favorable exchange rate policy, contributing to renovation expenses, and accelerated depreciation opportunities were listed as the most important financial support items. Subsidies targeting human resources included salary contributions, wage subsidies, training support for workforce, suspension of layoffs, and reduced social security contributions that aim to protect and develop workforce during the pandemic. Finally government efforts on destination promotion, international lobbying activities and diplomacy, providing holiday credits and vouchers, and extending bank holidays particularly in order to stimulate domestic tourism were listed among government mitigation measures facilitating demand.

The findings allude to a transformative power of the current crisis. This is reflected in two dimensions, namely; alterations in generating markets and changing market structure and tourist motivations. Domestic tourism, Middle East & Gulf and CIS countries were identified

as more crises resilient markets while health tourism and nature-based tourism were listed as tourist products with higher immunity to the pandemic. Increased importance of customized services, pandemic hygiene standards becoming permanent, increased popularity of travel insurance systems, increases in per person costs, and increased importance of brand image were rated as the prevalent transformations in tourism operations.

The study also identifies the key characteristics of tourism and hospitality businesses that are likely to survive crises. These organizations are likely to offer quality service, utilize information and communication technology, differentiate based on quality rather than price, operate under a strong brand, offer diverse products and services, cater domestic tourists, and with higher share of paid in capital.

Drawing on the case of Turkey, Malaysia, Jordan and Azerbaijan and quantitative data collected from 189 tourism experts, the present report proposes several policy recommendations that are important not only for these case countries but for other OIC members. Considering the importance of tourism, these countries are also ideal cases to study the effectiveness of government response to crises. These countries have also been through a series of crises every few years. These crises have had a negative impact on tourists arrivals and consequently on tourism revenues. A collective approach based on the experiences of different countries in dealing with the current crisis is therefore important to draw significant conclusions that can potentially direct public policy oriented towards reducing the negative impacts of the pandemic on tourism and paving the path to recovery.

Tourism has been one of the first and most severely affected industries by Covid-19. However, it can regain its old dynamism only after 2021. The recovery is expected to progress according to the order of impact. However, struggling with the lock-downs, mobility restrictions and social distancing for more than a year, tourism businesses are hardly surviving anymore. Slightly over one-half of the respondents predicted that without external support they would go out of business within the next three months if the implications of the pandemic continued with similar strength. Only 7% of respondents forecasted they would still survive if the pandemic extends for another year.

This is also a period of investment, capacity building and work-out long-standing problems within OIC tourism. Based on the afore-mentioned discussion, the study makes several policy recommendations that can be useful for tourism decision-makers in OIC. It has

become apparent that the tourism industry and policy-makers need a more coordinated and multi-faceted approach to risk and crises management, particularly in the case of epidemics. Destinations use this time to restructure, improve and invest on infra-structure, human resources, digital platforms, and destination governance. Hence, if member countries invest in tourism service quality and try planning the disturbed balance between tourism supply and demand in a sustainable manner, there are also some opportunities.

Crises and risk management strategies should also be prepared based on different scenarios. Various risks and preventative measures should also be communicated with industry stakeholders. Hence an open communication with full access to reliable data is needed. Artificial intelligence is also being used to identify possible scenarios and predict risks and impacts. The accuracy of these predictions however is very much dependent on the quality of big data collected and analyzed. The strategies should also match with the characteristics, markets, products, needs, background, experience and values of the stakeholders at the destination. OIC also needs to have a central governance structure at the OIC level to coordinate and invest long-term resilience against the crises. Such an institution would also create economies of scale for various expenses on testing and tracking than each country investing on its own certification, tracking and so on.

Based on data collected for the present report, domestic tourism, CIS market, Middle East and Gulf regions are predicted to be growing more than the traditional markets in Europe and the Americas. This implies revisiting targeting strategies after the crisis. Therefore, adapting products and services to meet the needs of the emerging market segments is important. Apart from the short-term measures, the crisis can be taken as an opportunity to establish permanent structural changes in the tourism industry. Indeed, like many OIC countries, low per tourist spending is a major problem in Turkish tourism.. This current crisis can therefore be used as an opportunity to achieve quality targets instead of quantity and to increase per capita tourist spending. For example, despite Turkey ranking as the 6th destination considering the number of arrivals, it is only the 14th in terms of tourist receipts. Hence the Covid-19 period can be seen as an opportunity to increase per capita tourist spending, by investing in quality, brand image and balancing demand and supply at optimum price levels. Our findings also suggested health tourism and nature-based tourism will emerge as strong markets. Efforts should be directed towards these types of tourism niche markets. Other structural problems in OIC include absence of regional destination management organizations. An independent,

accountable and collaborative structure that brings the private sector and local governments together should be established to manage risk and crises at each major destination and at international level at OIC.

In the long term, more use of robots and automation systems will increase and hygiene standards will become more stringent. Therefore, accommodation and food and beverage businesses should be able to develop similar strategies in the long term and adapt to the sensitivities that will occur in the market after the Covid-19 outbreak. Special-interest tourism will gain greater importance thus creating new opportunities for tour operators. Significance of ICT was also mentioned by OIC tourism experts. Increase in per capita prices, reduced capacity and importance of branding were mentioned as transformations awaiting the industry. Competition based on quality rather than competing on price was also perceived as more viable. Similar transformations await the agencies, and larger groups will be replaced by smaller boutique groups and private tours. In this manner, guide–driver options to bring the costs down can be listed among the trends that may be more popular for small groups of tourists.

The recovery scheme should also include to provide support for the training and development of idle human resources, facilitate postponement of reservations instead of cancellations, prevent discriminatory policies, establish crisis and risk management systems and keep them continuously active, and strengthen the capital structures of businesses, and make them resistant to the medium-term effects of Covid-19 and crises to come. These goals can be listed as objectives to be achieved during the transformation process. Every crisis can be transformed into an opportunity with the implementation of effective measures to create a more resistant, stronger, and competitive industry.

The travel demand will switch to more safe destinations and tour operators will concentrate on countries with stable and trusted measures against Covid-19. Another implication is to establish Covid-19 free tourism bubbles that minimize contact and risk of infection by establishing and limiting tourist touch points and vaccinating tourism employees. These bubbles and corridors would also be established by the central governance at OIC. There is also a need to establish a Standard Semafor within OIC based on international collaboration, standards and collective effort to contaminate the impacts of crises.

Marketing communications, public relations and lobbying activities are also important, to create a safe image and build trust. Information provision, statistics, border restrictions,

sanitation processes, safe tourism standards, certification, hygiene procedures and how these are monitored and audited are not only important activities but these should also be supported and used in branding and repositioning OIC countries as safe destinations.

OIC tourism industry should also make better use of Information and Communication Technologies (ICT). In order to create both high-tech and high-touch services, the OIC tourism industry needs to invest in technology, AI, touchless service processes and service robots. Integrating big data, scenario planning, research and data analysis into risk management strategies will also deliver better precision in decision making and forecasting.

Enhancing tourist experience is another major strategy that might be invested while restructuring the industry during Covid-19. Investing in both physical infrastructure, governance and human resources during this period will create a much more competitive tourism industry within OIC after the crisis is over. Major renovations and infra-structure investments can be utilized, local governance structures and collaboration between public and private sectors can be strengthened, and the quality and quantity of potential human resources in tourism can also be enhanced during Covid-19.

Finally, as an industry that is featured with intense human interaction, tourism and hospitality will undoubtedly go through several long-term transformations in the aftermath of Covid-19. Hence both DMOs and industry stakeholders should be positioned to deal with a new environment post-Covid-19. Available data yield different scenarios on when the industry will recover, what new challenges and standards will be imposed, who is more likely to travel, which products and services will disappear and transform. Hence, the stakeholders should be able to create different action plans for each scenario to be put into action after recovery. Destination image shall also be re-positioned based on safety, health, and cleanliness. All stakeholders should also make sure they have a risk and crises management plan and a strong financial structure to improve their resilience in the future. Finally, OIC members should harness the positive power of the current crisis by addressing structural issues in the industry such as sustainability, over-tourism, climate change, and destination governance.

INTRODUCTION

Tourism is highly vulnerable to internal and external shocks as diverse as economic downturns, natural disasters, epidemic diseases, terror attacks and political conflicts. Therefore, there is a need for recommendations on measures that can be taken by the destinations before (risk management), during (response) and after (recovery) the crises. Such non-frequent unfavorable short-term events can negatively affect the tourism and travel industry depending on their duration, severity, timing, outputs, and their nature (e.g., type of crisis). Few would disagree that the tourism and travel industry is highly sensitive to crises regardless of their types. This is unsurprising given that individuals consider their personal safety as a key priority when travelling abroad. Looking back into previous regional crises such as major terror attacks in some countries reveals how such crises immediately result in notable downturns in traveller numbers and inherently revenue generation for airline companies, hotels, and local catering businesses. The notable impact of crises on tourism over the past two decades has contributed to the emergence of a growing stream of academic debate delving into how tourism businesses and tourist destinations should handle crises and what mitigation strategies should be implemented to reduce potential damages. A common feature of crises is perhaps the inherent inability to predict them. This is particularly the case of the ongoing Covid-19 pandemic, which has presented a real shock to the global tourism and travel industry, creating much uncertainty about the future of the industry over various aspects including business models, destinations and even traveler behavior.

The tourism and travel industry is undoubtedly among the key economic sub-sectors that have been severely hit by the current Covid-19 pandemic. Historically, travelling was a core factor in facilitating the spread of contagious diseases, and thus border closures and quarantine measures were typically among the common responses to control the spread of the virus and mitigate its potential effects. Following the outbreak of Covid-19, travel restrictions and lockdown orders have turned many tourism destinations into ghost towns while also causing major harm to small and medium-sized tourism businesses resulting in sudden growth in unemployment rates worldwide.

As will be illustrated throughout this study, the impacts of these restrictions and mobility bans have had major negative impacts on almost every sub-sector within the tourism and travel industry including events industry, tour operation, airline companies, catering businesses, and hotels. It has become apparent that surviving these challenges has been difficult for many

businesses worldwide, over the globe raising urgent need for knowledge-based policy recommendations that have the potential to help businesses and destinations cope with the crisis.

Previous literature indicates that diseases prior to the COVID-19 pandemic have regionally reduced tourism volume. The best examples of such cases are SARS, which affected the Far East in 2003, and MERS, which spread in the Middle East and the Arabian Peninsula in 2012. Similar to the SARS and MERS outbreaks, COVID-19 started as a regional epidemic in China in late December 2019. However, the virus spread rapidly all over the world, where the center of the outbreak first moved first to Europe, then the United States. As of 11 March 2020, the World Health Organization (WHO, 2020) declared the disease a pandemic. While the pandemic has created economic shocks for all industries, its impact on the tourism and travel industry has been much severe. With the start of implementation of national and international travel bans, tourist movements ceased, and the tourism industry faced a sudden and uncertain crisis right before the tourism season. Against this halt, various measures have been taken to overcome the crisis in tourism, and a certain level of flexibility was finally provided with travel restrictions due to the decrease in the number of cases. Yet, after the first wave was over the spread of the virus started to gain pace again and a major portion of the countries started to return to even stricter measures including mass quarantines.

While the devastating impacts of the pandemic on tourism are not restricted to specific destinations or countries, one may safely assume that the level of economic development may shape how countries respond to the crisis. Relatedly, it appears that there is no “one size fits all” mitigation strategies thus placing importance on the “context” where these recovery strategies are implemented. Hence the adoption strategies should be customised based on different environmental factors and impacts. For example if the tourism industry is composed of SMEs the recovery strategies should be customized to address their needs. Or if the locals have access to vaccination or a certain level of herd immunity is achieved, destinations with strong health systems would choose to relax border formalities and testing requirements.

In the case of OIC countries, tourism is a critical sector that creates the much-needed foreign exchange income and jobs. With its multiplier effects, tourism also triggers other economic activities in other sectors. Prior to the pandemic, the OIC countries’ share of the worldwide international tourist arrivals was 10.7% representing 12.4% of the global tourism receipts (SESRIC, 2020). Therefore, providing knowledge-based policy recommendations to

help mitigate the adverse impacts of the pandemic and facilitate post-crisis recovery will not only benefit OIC countries but also contribute to the global efforts geared towards building resilient tourism and better future for the whole industry.

For more than one year now, the pandemic has caused major damages to almost all countries' economies with the tourism and travel industry being at the top of the most vulnerable sub-sectors. The current crisis has also been the premise of numerous published works addressing a wide range of issues including the impacts of the pandemic on both micro and macro levels (e.g., Foo et al., 2020), resilience strategies (Sobaih et al., 2021), and post-crisis recovery (Fotiadis et al., 2021). There have also been several recent works addressing how the pandemic has affected the tourism and travel industry in OIC countries including Turkey (Demirdelen Alrawadieh, 2021), Malaysia (Foo et al., 2020), and Egypt (Salem et al., 2021).

The academic debate is unlikely to diminish in the short-term since it will probably take a long time until destinations and tourism businesses regain full recovery while also it is unclear whether or not a significant change in travelers' behavior will emerge in the post-crisis era. However, it has become apparent that a collective approach based on the experiences of different OIC members would help draw significant conclusions that are useful in directing public policy oriented towards mitigating the adverse impacts of the pandemic on tourism and planning the path to recovery. The current report is set out to achieve the afore-mentioned objectives drawing on multiple case studies, qualitative data and cross-sectional surveys. The study is in line with Ritchie and Jiang's (2019) recommendation that academics should work more closely with the government and industry in converting knowledge into practical outputs and utilizing primary data in policy development.

1. THEORETICAL FRAMEWORK

a. Impacts of Covid-19 on Tourism Industry

Covid-19 has immediate and severe implications on the tourism industry with unprecedented consequences. This section of the report sets out the theoretical framework discussing and comparing previous crises and epidemics with Covid-19 based on risk and crises management literature and mitigation strategies both from the perspective of the industry and the government.

i. Crises and Tourism

Tourism is a major global economic sector and has significant contributions to national economies, especially in developing countries, where it creates employment, stimulates regional development and attracts foreign exchange. The tourism industry with an annual average growth rate of 4-5%, the tourism industry creates 8% of the global GDP and 10% of employment. Considering the scale, rate of growth and the multiplier effect it creates, local economies are increasingly becoming more dependent on tourism receipts. Yet, tourism is also among the most vulnerable industries affected by various factors other than the state of the local economy. Numerous external issues; political events, natural disasters, epidemics, accidents, terror and so on also affect tourist flows to a great extent. Because of its international nature, the situation in tourist generating countries also affects a destination's tourist volume which further complicates managing and forecasting demand.

During recent years, the tourism sector has been facing significant crisis-driven challenges putting *risk and crisis management* at the forefront of the industry's agenda. It can be noted that an increasing number of disasters and crises affect the tourism industry, ranging from natural to human-driven incidents. With the globalization of the world's economy, almost every country is being affected by these crises or disasters. Few would disagree that crises occurring in one single place of the world can potentially affect tourism activities in broader areas or even worldwide.

So far, past crises, with few exceptions, had regional short-term regional impacts and their global effect on tourism volume was relatively limited. The 9/11 had similar ripple impacts starting from the USA concerning government reactions (travel restrictions) and policy

measures (business loans) like COVIDCovid-19. With the exception of the economic crisis of 2009, the crises had regional impacts and global tourism volume continued to grow until 2020. Yet, COVIDCovid-19 had an unprecedented effect on the whole tourism and travel industry. However, unlike different from its predecessors, COVIDCovid-19 has become a global crisis and tourism is among the first and most severely affected industries from the pandemic.

Tourists' motivation to travel to a destination is influenced by many factors, some of which are shaped by the destination's natural and cultural characteristics. In contrast, of the destination, whereas others are based on the destination's political, social, and economic stability of the destination (Güvenek & Alptekin, 2015). Therefore, the fact that tourists negatively perceive a destination in terms of safety can also negatively influence tourism movements. One of the most important factors affecting this perception is the crises of different origin. Epidemics are one of the major causes of such crises. The foot and mouth disease, SARS, MERS, avian influenza, swine flu (H1N1), and Ebola outbreaks are some of the epidemics that greatly impacted the tourism sector. The most notable negative outcome of an emerging health crisis is the relatively sudden decrease in the demand for destinations (Çeti & Ünlüönen, 2019) which eventually results in a considerable decrease in generated revenues for destinations and inherently tourism businesses at a larger scale.

Considering its enormous speed and global impact, Covid-19 is perhaps the most serious crisis the tourism industry has ever faced. The immediate response to the pandemic by several countries has been through lockdown orders and limiting human mobility. This has resulted in large-scale economic downturns that affected tourism in both developed and developing countries. To illustrate its volume, Covid-19 is estimated to have a seven-time larger impact on tourism than the 2008 Financial Crisis. This effect is expected to result in a decrease of up to 78% in global tourism volume with the tourism industry being expected to recover to 2019 pre-crisis levels not before 2023. A collective approach based on the experiences of different countries in dealing with the current crisis is therefore important to draw significant conclusions that can potentially direct public policy oriented towards reducing the negative impacts of the pandemic on tourism and paving the path to recovery.

1. Risk and Crises Management in tourism

In order to understand crises, and offer a framework for managing them, it is necessary to outline their definitions and characteristics. A number of theoretical assessments were

proposed to provide a definition of this phenomenon. Broadly speaking, a crisis is broadly defined as an unexpected, disruptive situation that threatens the existing business assumptions (Avci et al., 2011) and long-term operations of organizations (Campo et al., 2014). From the perspective of tourism; a tourism crisis can be defined as an event or a set of circumstances which might damage the reputation, sales, and operations in a destination and organizations within the tourism region (PATA, 2011). However, risk management in the tourism context, however, refers to the planning and implementation of processes directed towards managing the adverse effects of crises and disasters on tourism.

There is a wide consensus that tourism is largely sensitive to crises and inherently is more vulnerable to their negative consequences (Pforr & Hosie, 2008; Santana, 2004). Crises can also require various immediate actions, decisions and countermeasures based on the extent and duration of their consequences. While crises are not new to tourism, they have increasingly achieved considerable prominence given the globalization of the travel business combined with the considerable media coverage that unfavorable events in destinations often receive (Pforr & Hosie, 2008). Since the seminal work of Faulkner (2001), the interface between crises and tourism has gained momentum. Considerable work has also been written on how tourism businesses and destinations respond to crises resulting in growing theoretical assessments oriented towards crisis management. However, recent reviews reveal that research on tourism and crisis is still at an embryonic stage (Aliperti et al., 2019).

Yet, following the outbreak of the Covid-19 pandemic, a flourishing academic interest into crisis management in tourism has emerged. This is evidenced in the growing number of journals' special issues covering a wide range of topics around the current crisis including the response strategies of the tourism and travel industry on both macro and micro level. Therefore, the prominence of crisis management is therefore unsurprising given its crucial role in enhancing the resilience of both tourism organizations and tourist destinations, fostering their defense mechanisms and reducing potential damages (Paraskevas et al., 2013).

Closely related to the notion of crisis management, recovery is the ultimate goal of businesses and destinations and simply refers to their ability to restore the pre-crisis status. Research identifies crisis communication, recovery marketing, and stakeholder collaboration as key factors contributing to effective tourism recovery (Ritchie & Jiang, 2019). Relevant to the current study, crisis communication and stakeholder collaboration are of particular importance. This is because the negative spillovers of crises are typically intercorrelated with

damage in one specific tourism sub-segment, inherently resulting in unfavorable consequences to other sub-segments.

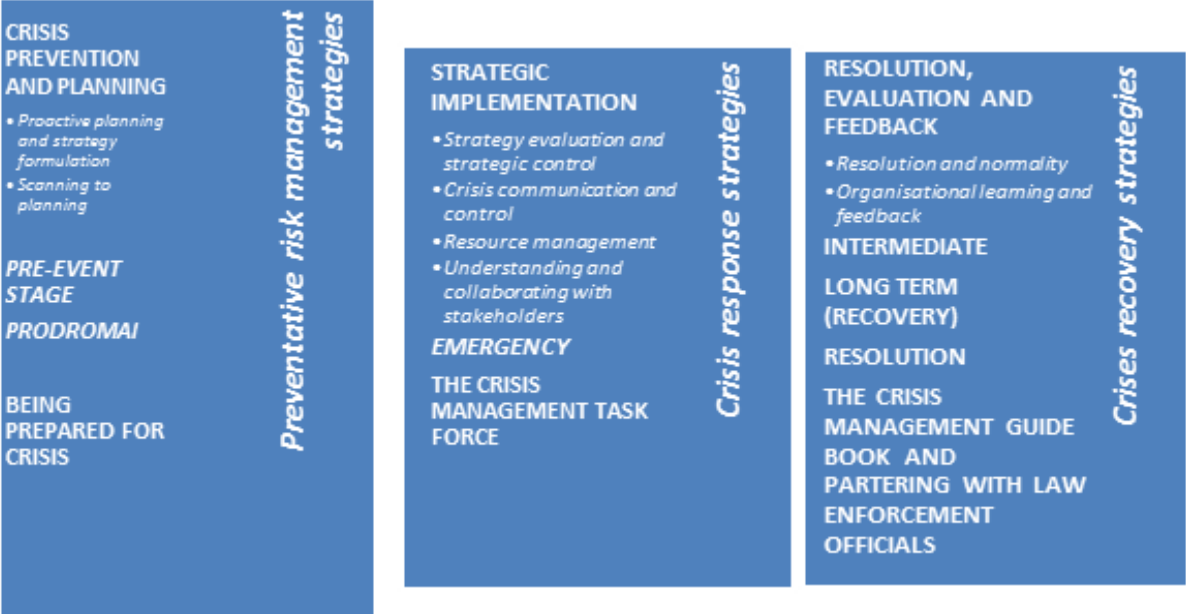
According to Faulkner (2001), the crisis has six stages. First is the *pre-event stage*. In this stage, contingency plans, scenarios or probability assessments play a critical role. Second is the *prodromal stage* where the crisis is unavoidable. At this stage warning and command centers are established and actions in contingency plans are initiated. The third emergency stage is the *acute stage* where a crisis has already hit and caused damage. In this stage internal and external coordination should be in place to protect the community, tourists and destination. Fourth is *intermediate* and fifth is *long term (recovery) stage*, which refer to cleaning up, post-mortem and self-analysis phase. During the recovery stage damaged areas such as; roads, hotels, transportation and other services have to be reconfigured. A good public relations and communication strategy is developed. The last stage is the *resolution* which aims to achieve a new, improved state. Feedback to the system to improve crisis management is very valuable at this stage. Because Covid-19 is still far from being contained and still experiencing peaks, we are still in the acute stage, experiencing the ongoing severe impacts of the pandemic in tourism.

Ritchie (2004), has suggested a strategic management and planning approach to the crisis which can be useful for tourism management. In his model, there are three main stages; prevention and planning, implementation, evaluation and feedback. Integrating these two studies, an effective strategic management model was developed by Ritchie (2004) based on the lifecycle of a crisis. Consistent with Ritchie's (2004), Faulkner's (2001) and Sönmez's (1999) studies, this study reproduced the strategic management framework for risk and crisis management. As Sönmez et. al. (1999) have discussed in their study, destinations should be prepared for crisis management. This means that there should be proactive planning and strategic action plans for the destination as stated in Ritchie (2004). So at the pre-event and prodromal stage of a crisis, risk analysis should be taken into consideration. In the first part of the reproduced model, risk analysis, environmental analysis and scenario planning should be used.

Risk is an antecedent of crises and its management is one of the initial steps in preventing and managing crises in destinations. As discussed above, tourism destinations face a range of risks that are both within or -out the organizations' (e.g. DMO) span of control. On Crises management on the other hand, crisis management includes strategies and processes utilized to prevent, cope with, and recover from crises. Thus crisis management starts with risk

management (prevention), continues with an initial response (cope) during the crises and recovery strategies after the crises. The lack of such a strategic approach to risk and crisis management can result in a sustained decline in the number of visitors to the destination, damage the destination's image and eventually result in decrease in revenues.

Figure 1. Crisis and risk management



Source: Ritchie, (2004); Faulkner, (2001); Sonmez, (1999); Yozcu and Cetin, (2018).

Hence, any crisis management process should have three main stages; before, during, and after the crises (Christensen et al., 2016; Ritchie, 2004). Moss (2004) discusses how preventative risk management policies before crises have subtler effects, and risk management is rarely recognized as a function of government. Understanding key measures that can be taken by destinations before, during, and after crises might result in a more efficient design of crisis response systems, strategies, and their implementation. Because risk management and crisis prevention are overlooked (pre-crisis); governments’ role in mediating the impacts of crises (containment) during crises and managing recovery after crises becomes much more critical. Another factor that defines the level and nature of government response is the extent of the threat that the crisis poses. The greater the threat, the more centralized the response (McConnell, 2003).

Because crises have industry- wide effects, a collaborative collective response (e.g. marketing communications) led by governments is needed for a more resilient industry. The

case of the September 11 terrorist attacks in the US is a notable example of the difficult decisions that policymakers confront (Blake and Sinclair, 2003). Sometimes administrative decision-makers might choose immediate strict measures or a reactive wait-and-see attitude to avoid potential political risks. During Covid-19, the majority of governments have been blamed for inaction and miscalculating the level and timing of the impacts as well as the outcomes of their interventions.

As discussed earlier in this study, crises are highly context-bounded which elevates the importance of drawing on various case studies to evaluate the feasibility of implemented strategies and facilitate the transfer of best practices in crisis management across destinations. This also raises the need for empirical investigation into the experiences of OIC countries in dealing with the current pandemic and drawing conclusions that can help design and implement effective mitigation strategies that can facilitate the path to effective and full recovery. In fact, a recent review identifies a major bias in case-studies-based research whereby most research into tourism crises is conducted in only five countries (Aliperti et al., 2019). Drawing on different case studies from different contexts is not only important to construct robust knowledge into crisis management, but also to translate knowledge into practical implications for industry and government.

2. Types of Tourism Crises

A number of authors have developed typologies of crisis that can be useful in understanding the crisis and creating impactful and knowledge-based managerial responses. Meyers (1986), for example, has stated nine types of business crises; crises in public perception, sudden market shifts, product failures, top-management succession, finances, industrial relations, hostile takeovers, adverse international events, and (de)regulation (Evans and Elphick, 2005). Coombes (1995) has classified crises based on stakeholders' perceptions. Such perceptions are whether the crisis is internal or external and result from intentional (e.g. terrorism) or unintentional (e.g. accidents) acts.

Seymour and Moore (2000), have suggested that crises are of two types: the cobra and the python according to the way in which they develop. For example, a "cobra" type of crisis usually comes as a shock. "Python" type of crisis on the other hand usually accelerates over time. An Earthquake is a cobra crisis whereas the climate change developing over time is a python crisis. Evans and Elphick, (2005) offered three types of crises based on their

predictability; these are classified as gradual, periodic and sudden threats . Considering their impacts; Parsons (1996), suggests three types of crisis; immediate crisis (1), where little or no warning exists (e.g. earthquakes). Emerging crisis (2), which develop slowly and may be stopped or confined (e.g. economic crises). And sustained crisis (3) (e.g. climate change), which may last for weeks, months or years. Sausmarez (2007), has defined two types; “exocrises” refer to crises triggered by external events (e.g. volcanic eruption) and “endocrises” that are triggered by events within the tourism sector (e.g. food poisoning).

Table 1. Crisis Typologies and Impacts

Crisis Type	Major Impact Level
Economic crisis	Macro
Environment crisis	Macro/micro
Health crisis	Macro/micro
Informational/reputational crisis	Micro
Structural crises	Macro/ micro
Political crises	Macro
Socio Cultural crises	Macro/micro
Technological crises	Macro/micro

Source: (Zech, 2016).

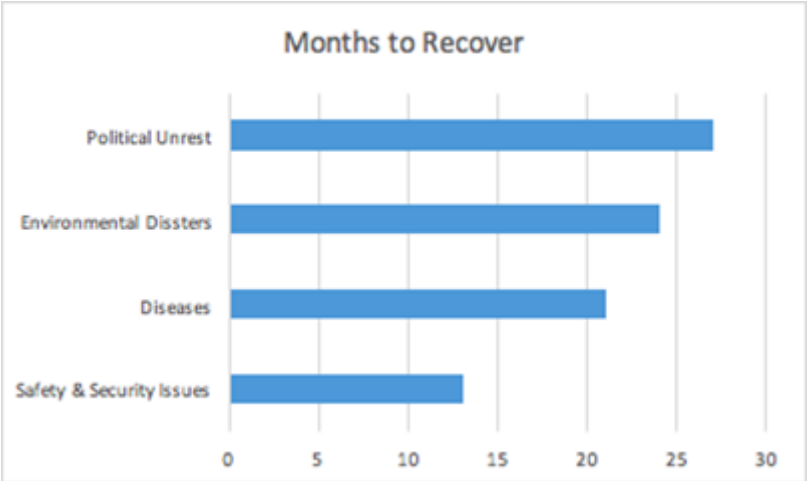
Crises that affect tourism might be classified based on their origin and their impacts. Regarding their origin; two broad categories can be identified namely; internal and external crises. Internal crises might refer to incidents that result from internal organizational human-induced issues such as financial fraud, loss of data, crime, food poisoning, fire, flood, etc. that result from a deficiency within internal management. External crises on the other hand, refer to events that are beyond the control of immediate management such as natural disasters, political conflicts, social unrest, epidemics, acts of war, and terrorism. There exist several types of crisis

that can directly influence the tourism and travel industry. Broadly speaking, these may be natural (e.g., hurricanes) or man-made crises (e.g., terror attacks).

According to Tony (2006), there are four types of crisis which may affect tourism. These are related to nature, civil conflicts, epidemics, and technology failures. Natural crises may include earthquakes and hurricanes and may result in damage to both general and touristic infrastructure. Crises driven by civil conflicts can be regional or international such as social and political uprisings (e.g., Arab Spring) and terrorist attacks. Countries typically warn their citizens from travelling to regions where safety is a concern. Epidemics are also key crises that can result in major downturns in tourist demand. This type of crisis will be discussed in detail in the next section. Finally, crises driven from technology failures include aircraft crashes and computer irregularity (e.g., fears of computer failure in the transition from 1999 to 2000) and these may influence tourist demand at regional and international levels (Tony, 2006).

The impact of these events, therefore might be immediate and long-lasting depending on the type of crises, its intensity, whether tourists were targeted or affected, which locations are involved, the extent of infra-structural damage, time of the year, the scale and extent of media coverage, travel warnings issued and so on. Contrary to common belief, acts of terror have a relatively short term impact whereas political unrest has a much more gradual impact and often lasts for a longer time. Safety and political stability become prerequisites for tourism (ITB, 2015). Figure 2 displays recovery duration for various types of crises. In order to handle these different types of crisis, a strategic approach is needed for both organizations and destinations.

Figure 2: Time to Recover from Crises (Months)



Source: ITB, (2015).

The impacts of crises can also be divided into macro and micro indicators. Micro refers to organizational issues that can be manageable at some level while macro perspective includes various uncontrollable factors such as environmental, technological, economic and political crises. Table 1 categorizes the impact of the crisis at macro and micro levels. Both figure 2 and table 1 state that epidemics can have both macro and micro impacts on destinations.

Depending on the severity of the crises, destinations might experience sharp declines in arrivals and receipts. Egypt for instance lost 8% of international tourism receipts after Sharm el Sheikh (2005) and Dahab (2006) attacks in 2006. After the Arab Spring during 2011, the arrivals dropped from 14 million to 9 million. Yet, although Egypt recovered to 11,5 million arrivals in 2012, because of political unrest the volume of international arrivals dropped again to 9,5 million in 2013. During the Lebanon and Israeli war, arrivals to Lebanon also dropped by 17%. In Ukraine, because of the political conflicts with Russia in 2008, the country experienced an 18% decrease in arrivals (WTTC, 2015). Usually competition is positively affected by the crises; Turkey, Greece and Cyprus as substitute destinations in the Mediterranean benefited from crises in Egypt, Israel, Lebanon and Jordan in the 1990s. Yet there are some instances where countries are perceived as complementary to one another. For example, because of the political unrest in Sri Lanka, its ad on destination Maldives were also negatively affected. Forest fires in Indonesia in 2015 also affected arrivals to Malaysia (COMCEC, 2017).

Because it has been developing for months, Covid-19 can be classified as a python type of exocrises, with external causes. Despite it having accelerated overtime, the impacts of the Pandemic have been unpredictable which has triggered sudden and an unprecedented decline in international tourism demand. Previous crises including epidemics had regional and short term impacts on the global tourism industry. None of those has reached the level of impact created by Covid-19. Governments were also reluctant in their response which created additional challenges for the tourism industry. Since the beginning of the pandemic, UNWTO has been updating her 2020 predictions about the impacts of the Covid-19 for worse. The following sections address epidemics as tourism crises and focus on Covid-19 describing its impacts on tourism.

3. Epidemics as Tourism Crises

Epidemics are among the key crises that have jeopardized the tourism and travel industry. Around two decades ago, SARS, which infected a total of 8,000 people in 2002, has

led many countries to impose travel restrictions especially to/from China and Hong Kong. With the diagnosis of the first patient in November 2002, SARS quickly spread to the entire country, then Southeast Asia and other parts of the world (Zeng et al., 2005). A businessman with the disease traveling from China turned SARS from an emerging local virus into a global outbreak by carrying the disease to Vietnam on February 23, 2003 (Wilder-Smith, 2005). Subsequently, international tourists visiting the affected regions and returning home caused the spread of the disease. Afterward, the WHO has announced the cities of Guangzhou and Hong Kong as high-risk tourist destinations (Mason et al., 2005). Hence, SARS and travel have become intricately connected.

The number of cases reported in Hong Kong represented 22% of all cases and 63% of cases outside of mainland China. Known as “The Pearl of Asia,” Hong Kong was labeled as the “masked city” due to masks worn by people walking on its streets (Au et al., 2005). In a few days, many cities in China were declared epidemic areas, and international tourists were warned from visiting these regions. In corroboration with the WHO, many countries have imposed travel restrictions on arrivals of Chinese citizens. After the SARS epidemic, the number of international foreign visitors to China decreased by 6.5% compared with the same period in 2002. This decline was even more striking given that it was the first monthly decline experienced within the last ten years (Zeng et al., 2005).

Toronto, Canada was another city affected by SARS. In April 2003, a 60% decrease in tourist expenditures was reported compared with the same period in 2002 (Jayawardena et al., 2008). Although the spread of the effects of the epidemic was uneven, they contributed to a significant decline in tourism volume in the first half of 2003 in certain destinations. Uncertainty over the desirability of global travel has also increased (Mason et al., 2005). In addition, tourists preferred short-distance travel, which led to the increased demand for nearby tourist destinations. Although no statistically industry-specific numbers were reported, all types of businesses in the affected regions experienced the adverse effects of the epidemic (Gu & Wall, 2006).

The SARS epidemic, which started from a Chinese province, is a representative example of an epidemic with a negatively profound impact on tourism around the world. WTTC (2003) shows a 15% loss of business in Vietnam for 2003, 43% in Singapore, 41% in Hong Kong, China and 25% in China and 7% in Thailand as a result of SARS. A total of 2.9 million

jobs were lost. As a result of these events in 2003, international tourism arrivals fell 1.2% for that year representing the biggest ever annual drop (COMCEC, 2017).

The impact of SARS on tourism was widespread. For example, economies such as Japan, Korea, Australia, Thailand, Indonesia and The Philippines, experienced a 10 to 50 percent decline in tourist arrivals even though they were not directly affected by these events. These events highlighted the interdependency which exists between regions. The economic consequences of SARS for Malaysia – with only five reported cases - were significant considering heavy reliance on intraregional trade and tourist arrivals from East Asia. Tourism, which contributed about 7.8% of GDP in 2002, was affected significantly, as reflected in the increase in cancellations of travel and hotel bookings. According to the Malaysia National Economic Action Council, tourism arrivals dropped 30% and hotel occupancy countrywide fell to 30 ~ 50% year on year, by the end of April 2003 (Robertson et al., 2006).

During the same period, airline bookings were reportedly down by 40% (Asia Recovery Information Centre, 2003). On 21 May 2003, the Malaysian Government released an economic package to sustain economic growth under the title “New Strategies Towards Stimulating the Nation’s Economic Growth”. It included 13 measures assisting the economic sectors hardest hit by SARS, such as tourism and transport. These measures were part of a more comprehensive package for promoting private sector investment and international competitiveness and strengthening domestic demand. The package contained a federal budgetary allocation of RM7.3 billion (US\$1.9 billion), or 2% of GDP, to stimulate the economy through public spending and reduced taxes (Robertson et al., 2006).

Around one decade after SARS, a new epidemic of Middle East origin has affected the Arabian Peninsula especially after September 2012. Known as MERS, MERS-CoV was a disease with a pandemic potential originating from Saudi Arabia, where millions of pilgrims travel for pilgrimage and Umrah during the year. The first cases outside the Arabian Peninsula were noted among travelers from Germany, Greece, France, Italy, the Netherlands, and the UK. Outside Europe, the disease has been detected in countries, such as Egypt, Tunisia, Malaysia, and the Philippines (Pavli et al., 2014).

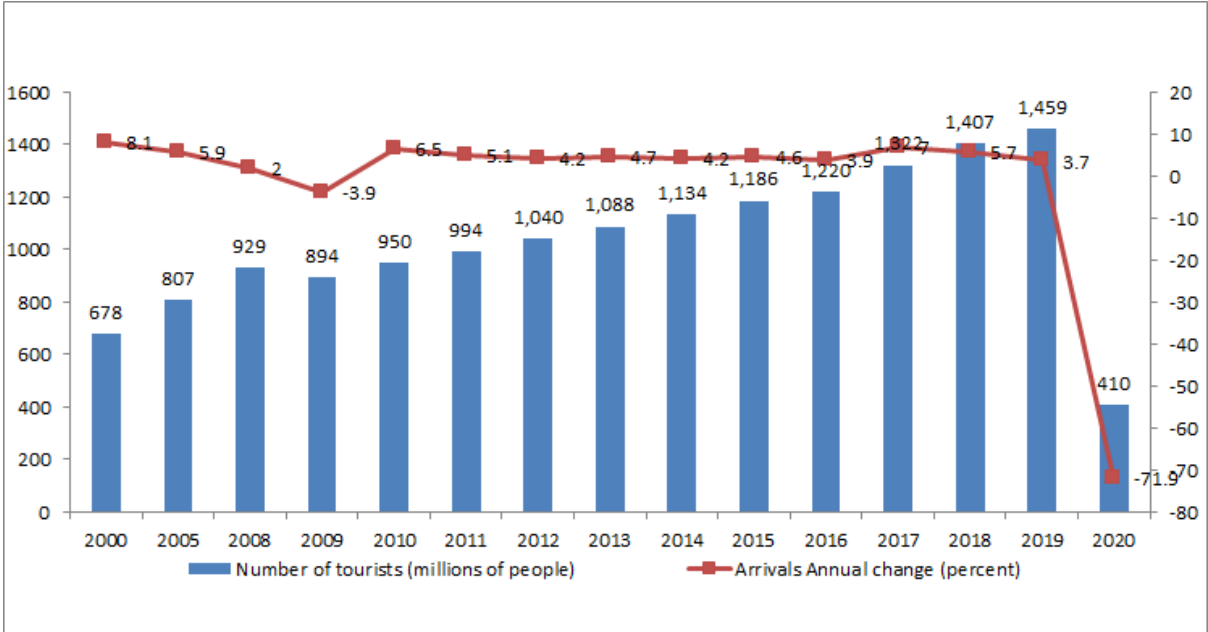
MERS had also notable impacts on tourism arrivals and inherently tourism revenues. To illustrate, a loss in tourism receipts at approximately 2.6 billion US dollars was reported in South Korea, which is another country affected by the MERS epidemic. Furthermore, the loss

in the number of tourists from June to September 2015 was approximately 37%. The most important reason for the decline was tourists who were concerned with personal safety and cancelled their travels instead of postponing (Joo et al., 2019).

A number of countries, such as South Korea, were more vulnerable to MERS than others particularly due to the close trade and tourism ties with Saudi Arabia. In addition, the spread of the epidemic increased after the return of millions of pilgrims from Saudi Arabia to their respective countries worldwide (Findlater & Bogoch, 2018). Unlike SARS and MERS, Covid-19 has become a global crisis with a much faster, broader, and more effective spread in contrast to the aforementioned examples, which were defined as major epidemics. The center of the virus has moved from China to Europe and the USA. By March 11, 2020, the WHO declared the disease a pandemic.

Epidemic diseases experienced in the past have especially affected the regions of occurrence but with less global impact compared with Covid-19. The most important difference that distinguishes Covid-19 from other epidemic diseases is its rapid and effective spread. Covid-19 has been declared a pandemic as the number of cases has increased rapidly in all countries since its emergence. As a result, countries closed their borders, and voluntary and compulsory quarantine measures were implemented to stop the spread of the virus. Businesses closed and supply chains deteriorated resulting in economic, social, and even psychological consequences in almost every country over the globe.

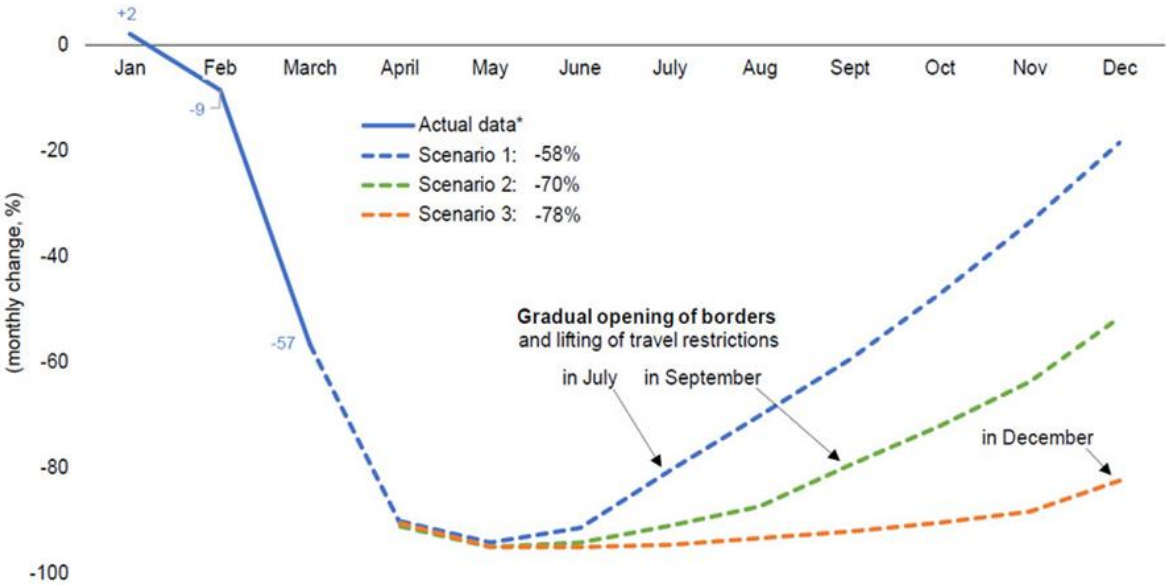
Figure 3. Global Tourist Arrivals (2000-2020)



Source: UNWTO (2020c)

Tourism has been one of the first and most affected sectors amid Covid-19. International travels were brought to a standstill due to quarantine measures, and individuals were forced to delay or cancel their travel plans. Figure 3 shows a decline of almost 72% as of December, 2020 and UNWTO predictions as of March 2020; UNWTO predicts a 70-75% decrease in 2020 tourism volume compared to 2019 (UNWTO, 2020).

Figure 4. Three Scenarios originally created on the impacts of Covid-19 on global tourism

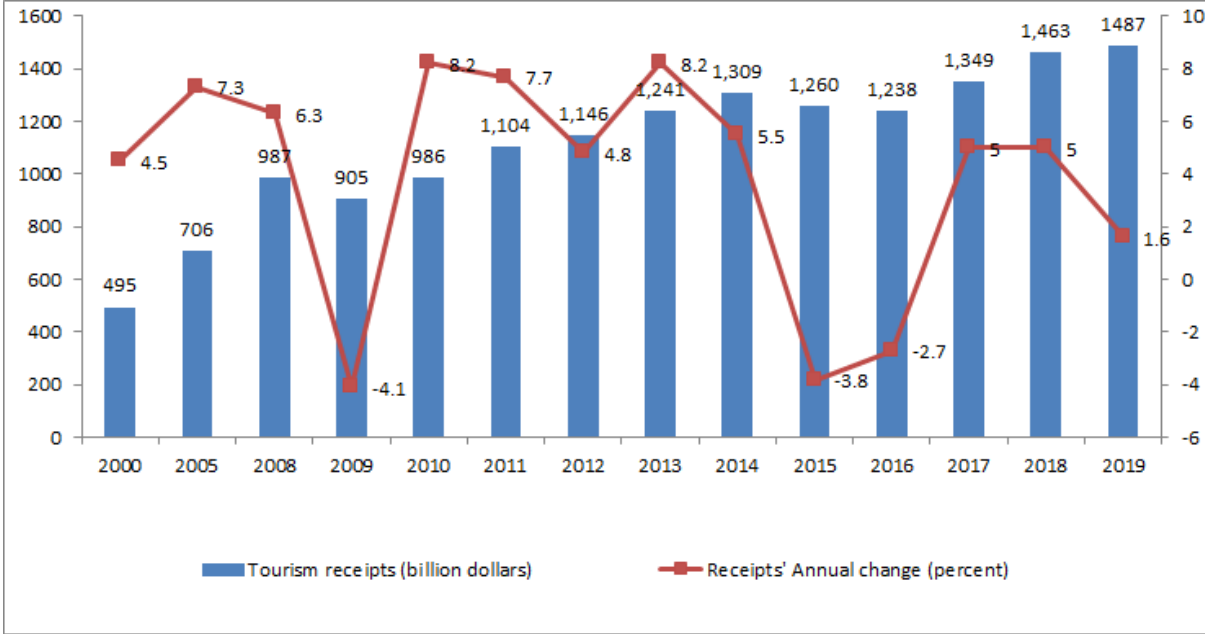


Source: UNWTO (2020)

ii. Covid-19 and Its Impacts on Tourism

Tourism has become an important global economic activity especially after World War II. Today, with a 4–5% growth rate, tourism volume by itself meets 8% of global products and 10% of employment (UNWTO, 2020). In addition, tourism affects economic activities in more than 135 sectors with its high multiplier effect, contributes to the balance of payments by creating a foreign currency input, and triggers many leading industries, such as transportation, trade, construction, health, and finance. Apart from its economic contributions, tourism has many social, cultural, and political benefits, which are outside the subject of the present study.

Figure 5. Global Tourism Receipts



Source: UNWTO (2020c)

Despite being an important global economic sector, tourism is very vulnerable to crises from any country or region of the world (Pforr & Hosie, 2008). Furthermore, it is highly sensitive to security problems, economic crisis, and health problems due to its postponable structure (Blake and Sinclair, 2003). In addition, tourism products (e.g. hotel beds, airline seats, restaurant tables, guide services) cannot be stored for future sales similar to physical goods due to their perishable nature. Rooms, seats, and tables that are not reserved today cannot be transferred to be sold later.

Crises have shown regional effects and have reached certain levels that influence global tourism movements to a limited extent, except for a few examples in the past (e.g., the 2008 economic crisis). As displayed in figure 5 tourism arrivals have seen a 4% decline in 2009 after the financial crises and continued to grow until Covid-19. Given the impact and speed, the global tourism industry has never faced a crisis similar to Covid-19. The impact of Covid-19 is expected to be seven times more devastating compared to the financial crisis in 2008 and already resulted in a 72% decline in arrivals. Despite the receipts not announced yet, a similar decrease is also expected in receipts (Tourism Economics, 2020).

Around one billion less tourists are expected to travel and tourism receipts are also expected to fall by 1.1 trillion dollars. This is more than ten times more than the decrease

experienced in 2009 after global financial crises. Considering the multiplier effects of tourism on the economy, a 2 trillion-dollar loss is predicted. Air traffic experienced a similar decline (74%) in the same period, supporting the impact of mobility restrictions. Nevertheless travel restrictions started to be eased, the number of closed destinations were 156 in April, declined to 59 as of November, 2020. Full border shutdowns at the beginning of the crises are transformed into more targeted restrictions.

1. Characteristics of Covid-19 as Tourism Crises

Different from previous crises, one may safely argue that COVID-19 has its own characteristics that distinguish it from other similar outbreaks. These characteristics are generally associated with the rapid and widespread of the virus which have forced a global shutdown of travel, businesses and leisure activities. Clearly, the uncertainty of the infection process and treatment coupled with the fact that the virus could be largely airborne, had direct impacts on global tourism due to the immediate travel restrictions taken by many countries (Wen et al., 2020). Apart from the short-term effects, the prediction that COVID-19 will trigger the biggest economic crisis in modern history leads to other uncertainties about the duration and power of its effects. For this reason, besides immediate challenges (e.g., travel restrictions), the tourism sector may encounter other long-term problems that will require collaborative efforts on different scales.

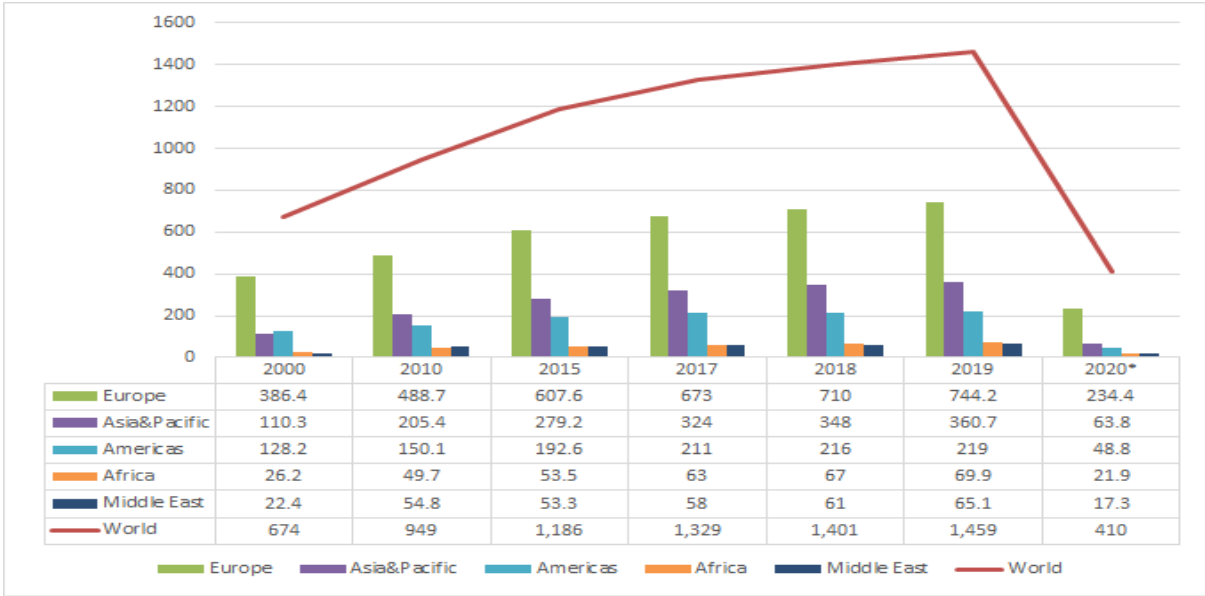
Tourism was the first affected industry from Covid-19 and is expected to be the last to recover due to its discretionary nature. Tourism all over the world has nearly come to a halt due to the wider and more severe travel restrictions imposed compared with other outbreaks, and travel has been entirely restricted in many countries, except for mandatory cases. Many airline companies and tour operators ceased their activities, and numerous accommodation units were forced to discontinue their operations. These far-reaching constraints, which affected the entertainment and leisure sectors, have caused the global supply chain to suffer as well (Boone et al., 2020).

In contrast to SARS and MERS, Covid-19 has spread rapidly worldwide starting from China, after which the center of the epidemic was first moved to Europe then to the USA. Since the WHO announced Covid-19 as a pandemic in March 2020, the number of countries that have significantly interfered with international air traffic and implemented additional health measures have increased. During April and May 2020, more than 80% of world destinations

closed their borders. This percentage gradually dropped to 29% by Fall 2020 (UNWTOc, 2020). However with the second wave of the pandemic the travel restrictions were reintroduced and international arrivals decreased by 80% and 83% in September and October respectively. Yet, the destinations stayed open and the number of closed destinations fell to 18% in November. For example, Europe started with a 92% in April and the number of closed destinations fell by 3% in early November, 2020.

On March 25, 2020, the United Nations World Tourism Organization (UNWTO) established a Crisis Committee to review the impact of the epidemic on the aviation, maritime, and tourism sectors and to provide innovative recovery solutions. The WHO is also a technical consultant on this committee (WHO, 2020). The participants in this committee have been part of a global coordination organization by holding regular virtual meetings to evaluate and advance the recommendations with the progress of the situation. The most important point that the participants emphasized is that no precise information is available in terms of how long the crisis will last or the final economic and structural impacts on tourism, where millions of people are concerned about the related unemployment. In addition, the Committee stated that the social impact of the crisis can extend beyond national tourism, thus creating a major concern for international communities, as small- and medium-sized enterprises comprise 80% of industries worldwide (UNWTO, 2020a).

Figure 6. Detailed Arrival Statistics of Global Tourism Volume amid Covid-19



Source: UNWTO (2020c)

Based on UNWTO (2020c) international tourist arrivals fell by 72% compared to 2019, due to travel restrictions, low tourist confidence, slow virus containment and treatment. Figure 6 above displays the regional impacts of Covid-19 on arrivals. Asia&Pacific (82%) and Middle East (73%) have experienced higher percentages of decrease in arrivals than the global average of 72%. While Americas (68%), Europe (69%) and Africa (69%) also experienced significant drops in arrivals.

2. Impacts of Covid-19 on Global Tourism

It is globally acknowledged that mobility is associated with the rapid spread of the virus. Because of its perishable nature (unlike physical goods an unsold restaurant table service time can not be stored and revenue not made today will not be available in the future) and dependency on travel by definition tourism was the primary sector affected by closures and mobility restrictions. Because of its human interaction intensive nature, majority of the tourism businesses (e.g. hotels, airlines, restaurants, tourist attractions) have been shut down creating existential threats to tourism industry stakeholders in the majority of countries (AEIST, 2020).

Based on the projections made by OECD (2020), measures taken to control the effects and spread of the outbreak will create a negative shock. As a result, a chain of effects in the form of decrease in effective demand will be noted, thus diminishing customer confidence, loss of income of laid-off employees, and finally decreased demand for travel and tourism services (OECD, 2020). According to the statements made by the World Tourism and Travel Council (WTTC), under the worst scenario, more than 197 million people worldwide may become unemployed in the tourism industry, which comprises approximately 10,3 % of the global GDP. Furthermore, a decline in GDP of up to 5.5 trillion USD for travel and tourism may be experienced in 2020 (WTTC, 2020). In addition, considering the latest developments (i.e., quarantine measures, travel bans, and border closures for the majority of Europe, which represents 50% of international tourism and in many countries in America, Africa, and the Middle East; the SARS scenario in 2003; the size and dynamics of global travel and current disruptions; and the geographic spread and potential economic impacts of Covid-19, the World Tourism Organization stated that visits from international tourist are 72% less than 2019.

International travel has experienced a sharp decline starting from April (-97%), May (-96%) and June (-91%). A slight recovery was experienced during July (-80%) and August (-77%). However with the surge in Fall many destinations stiffened travel restrictions and other

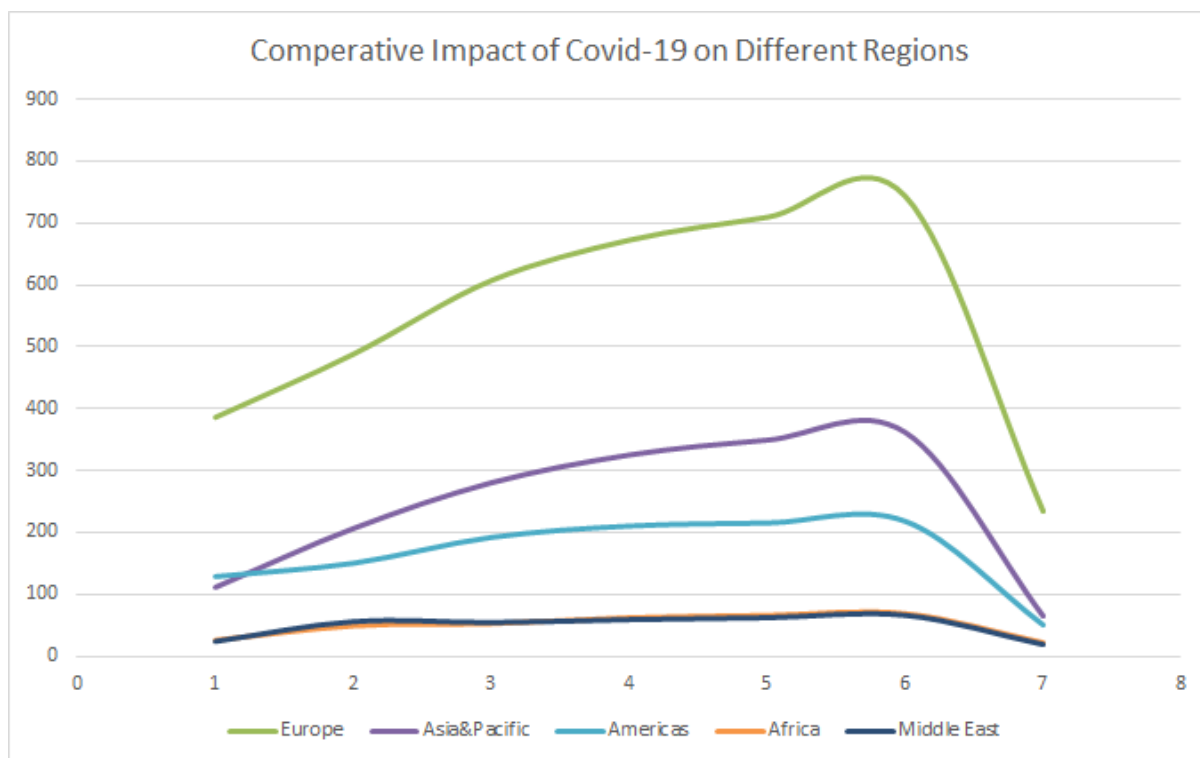
measures resulting in a 80% decline in September and 83% in October, 2020. 2019 measures of economic activity are unlikely to be achieved until around 2023.

Several scenarios were introduced by UNWTO for Covid-19. The first scenario (recovery by mid- 2023) oversaw a decline of 58%, the second scenario (recovery by the end of 2023) predicted a 70% decrease and the final scenario (recovery by 2024) forecast a 78% decrease in 2020. Based on actual data, 2020 volume will end up somewhere between the 2nd and the 3rd scenarios.

The most affected sector of tourism from the turnover perspective is Meetings and Events (-67%), Travel Agencies and Tour Operators (-55%), Accommodation (-50%), Air travel (-47%) and Food & Beverage (-40%). 18 airlines are already bankrupt and 2/3 of aircrafts are parked awaiting re-opening. 87% of all MICE events have been cancelled or postponed. Occupancy levels also dropped to 40%. Travel agencies also lost 85% of their business and are still struggling with cancellations and refunds (TURSAB, 2020).

Table 2. Comparative Impact of Covid-19 on Global and Regional Tourism

Arrivals	2000	2010	2015	2017	2018	2019	2020*	19/20*	(%)
World	674	949	1,186	1,329	1,401	1,459	410	-72%	100
Europe	386.4	488.7	607.6	673	710	744.2	234.4	-68.5%	50.7
Asia & Pacific	110.3	205.4	279.2	324	348	360.7	63.8	-82.3%	24.8
Americas	128.2	150.1	192.6	211	216	219	48.8	-67.7%	15.4
Africa	26.2	49.7	53.5	63	67	69.9	21.9	-68.6%	4.8
Middle East	22.4	54.8	53.3	58	61	65.1	17.3	-73.4%	4.4



Source: UNWTO (2020c)

In the report published by *Tourism Economics*, the impact of the epidemic on travels was estimated to continue for eight months. After a decrease of approximately 39% in global travels, a rapid recovery is expected from 2021 onwards, whereas the numbers for 2019 cannot be reached before 2023. In addition, a decrease of 23% is expected for domestic travels. The domestic market would create a substitution since domestic travel restrictions will be lifted before international restrictions (Trimble et al., 2020).

Global leading indicators also indicate that tourism spending will experience a long-term and sharp decline. The cancellation of national (i.e., leagues and conferences) and international (i.e., congresses and Olympics) events due to Covid-19 will certainly negatively affect the tourism industry. In addition, a fast decline can be expected in MICE (Meetings, Incentives, Conventions and Events) due to the digital meeting environments that are being used due to the inability to make business trips. Business travel will also continue to shrink as virtual meetings and online systems started to take over. In addition, uncertainties emerge regarding the possible effects and duration of Covid-19, and levels of vaccination and research on the transmission of the disease and its symptoms remain insufficient.

Despite the slight improvement during summer 2020, reintroduction of travel bans and restrictions resulted in another sharp decline in global tourism movements starting from September onwards. Despite the challenges 45% of consumers planned to have a vacation in the first six months of 2021 and 63 for the 2nd half. 21% of these have already made a reservation as of December 2020. Domestic tourism seems to be more popular among American and Japanese travelers whereas Brits and Germans seek international holidays. During the pandemic 42% of tourists postponed their travel plans, 35 % cancelled their trips, 38% preferred domestic holidays whereas 19% succeeded in traveling abroad. 33% of travelers still believe Covid-19 will affect their travel plans for another one year. Most trusted mode of transportation is personal car (42%), train (38%) and flight (23%). 67% of the tourists still prefer to stay in traditional hotels and 48% prefer a cooking facility in their rooms (TURSAB, 2020).

3. Mitigation Strategies

Encouraging people to stay at home, cancelling or postponing large events, closing schools, universities, libraries, factories, limiting transportation, social contact, making mask as mandatory (Chen et al., 2020), medical support and resources, strengthening individual protection, medical isolation, controlling of population mobility, reducing gatherings (Qiu et al., 2020), requiring essential businesses to run skeletal operations and distant work (Ozili, 2020) are some of the government measures to reduce the spread of the virus.

While apparently responsible to flatten the curve for Covid-19 and thus reducing the burden on public health facilities, these large-scale quarantines, travel restrictions, and social-distancing measures drive a sharp fall in consumer and business expenditure (Bakar & Rosbi, 2020). The widespread impact led the economies to change to new normal conditions (Haryanto, 2020). Therefore, the Covid-19 pandemic caused not only a health crisis but also a global economic crisis. Economic forecasts predict a significant contraction in GDP in the coming years.

Impacts of the pandemic are especially significant in service industries because of extensive face-to-face encounters in hotels, restaurants, shopping malls, museums, retail outlets, entertainment venues, professional and business services, personal services, educational institutions, and healthcare facilities. Tourism industry is among the sectors most severely hit by the pandemic. Travel bans, capacity restrictions, and closure of public places

and activities affect tourist movements. These also limit events, meetings, and conferences. Tourism is grinding to a halt as travelers cancel trips, airlines suspend flights, and hotels start to host only a small fraction of what they used to before the pandemic. While some governments started easing up on travel restrictions gradually, the level of reopening remains volatile, with some countries starting re-quarantines with increased infection rates (Gretzel et al., 2020).

Tourism stakeholders and local governments acknowledge the importance of managing risk and responding to crises. Crisis response strategies might include internal organizational strategies (e.g. postponing investments, decreasing capacities) or governmental responses (e.g. financial support, incentives). To achieve successful recovery, it is crucial to ensure effective crisis communication and stakeholder collaboration (Ritchie & Jiang, 2019). Without these, recovery will likely take much longer time as well as consume greater resources.

a. Government Mitigation Strategies

Their discretionary and perishable nature makes tourism services very vulnerable to crises. Because crises have significant industry-wide effects, a collaborative collective response led by governments is needed for a more resilient industry. While an initial negative shock from the crisis is inevitable, governments should rest assured that the tourism sector can recover if action is taken. Hence, countries should incorporate crisis management planning into their overall sustainable development and marketing/management strategies to protect and rebuild their image of attractiveness, reassure potential visitors of the area's safety, and aid local travel and tourism industry members in their economic recovery. These destination wide activities can not be efficiently handled by individual tourism stakeholders.

Governments are usually in a better position to handle crises and mitigate their impact on tourism as they often possess more power and resources (Ritchie & Jiang, 2019). The rapid spread of Covid-19 globally has created a wide range of responses from governments (Hale et al., 2020). Every country has adopted its own timing of risk-reduction strategies reflecting their differential risk assessments (La Marca et al., 2020). Governments in various countries have taken different measures to cushion the economic costs of shutdown and mobility restrictions.

Many governments also concentrated on national interests rather than international solidarity to prevent the spread of the disease (Jones and Comfort, 2020). Uncoordinated

governmental responses and quarantines have also led to a disruption in the supply chain (Nicola et al., 2020) and the tourism and hospitality industry have ground to a halt in majority of countries (Wen et al. 2020). The paradox with Covid-19 pandemic is that travel has been a threat to the containment of Covid-19, which created a dilemma among governments trying to help the tourism industry recover while preventing the disease from spreading.

The rapid spread of Covid-19 globally has created a wide range of government responses (Hale et al., 2020). Nevertheless, government restrictions on commercial activity in response to Covid 19 have been more stringent, broader in scope, more widespread, and lengthier in duration than policy responses to previous crises (Baker et al., 2020). The impact of this approach is that consumers stay at home, businesses lose revenue, and lay off workers and unemployment levels rise sharply (Bakar & Rosbi, 2020). To cope with these negative outcomes many governments have responded by announcing very large stimulus packages (Prideaux et al., 2020) and unemployment fees to maintain economic and social stability (Higgins-Desbiolles, 2020).

Similar to previous crises, governments have already used various interventions ranging from tax holidays, financial incentives, fiscal measures, credit facilities to employment support and demand stimulation to help the industry survive Covid-19. Typically, government policy responses following a crisis may include infrastructure and reconstruction, financial assistance for tourism businesses, and development of communication and marketing campaigns to promote tourism (Ritchie & Jiang, 2019). For example, Italy offered 600 Euro / month for tourism employees who became unemployed during the pandemic and France committed with a 18 billion USD recovery package for the tourism industry. The US subsidized a 2 trillion USD stimulus package earmarked to fund those hit hardest, including travel agents and airlines.

However, because of its scale and duration Covid-19 also raised some questions about the effectiveness of governments in responding and containment of crises. The lack of knowledge on the disease and its severity made governments overlook the needs of the tourism industry. Moreover, different from previous crises, governments closing down hospitality facilities was also seen as a source of the problem by tourism stakeholders and changed the risk image of the tourism industry in the minds of consumers. Tourism industry facing complete quarantine for months has not been able to recover unless subsidized by the public.

Government responses to impacts of Covid-19 on the tourism industry might also be classified under direct and indirect interventions. Some of the indirect interventions (e.g. restrictions on mobility, capacity reductions) also created major setbacks for the tourism industry. The direct interventions (e.g. credit facilities) on the other hand targeted to relieve some of the specific stress on the industry (e.g. salary contributions) and stimulate tourism demand (e.g. holiday subventions to the domestic market).

These interventions can be grouped under three areas and include tax and fee-related waivers (i); credit and loan facilitation, credit holidays, deferrals of payments, rent subsidies, industry and location-specific relief funds and grants, government guarantees on loans, conversion of distressed loans into tax credits both for the debtor and creditor, acceleration of depreciation, employment support (ii); wage subsidies, short-time work compensations, unemployment grants, suspension of lay-off of employees, social security welfare waivers, accelerating recovery in demand (iii); subsidized vouchers, facilitation of domestic travel, establishing travel insurance systems, travel bubbles, vaccination visas, promotion and restoring safe destination image. These are listed in table 1.

Beyond immediate measures to contain its impacts, governments started introducing recovery measures targeting long-term resilience after Covid-19. Hence, government response strategies might also be divided under long-term strategic (e.g. market diversification) and short-term tactical (e.g. tax holidays) responses. This period can also be seen as an opportunity to fix structural problems in the industry concerning sustainability, over-tourism, climate change, and destination governance (Seraphin & Gowreesunkar, 2019). As noted by Gössling et al. (2020), Covid-19 has proved that measuring success by growth in tourism numbers is an outdated perspective. Historically, regardless of their types and severity, major crises have given birth to new notions and platforms incorporated in organizations and other regional and international bodies with significant contributions to human welfare. Despite major uncertainty, the current crisis is also a source of much optimism to expect favorable outcomes in the tourism and travel industry in the post-Covid era.

Table 3. Government Interventions to Mitigate Covid-19

Type of Response	Indirect	Direct
Short-term	<p>Tax, rental and fee reductions, holidays and deferrals.</p> <p>Grants, credits, cash-flow support.</p> <p>Reduced interest rates.</p> <p>Government guarantees on loans.</p> <p>Liquidity supports.</p> <p>Wage subsidies, salary contributions, compensations.</p> <p>Travel bans, social distance measures and quarantines.</p> <p>Enhanced centralized medical services, contact tracing.</p> <p>Provision of protective supplies (sanitizers, gloves, masks etc.)</p>	<p>Holiday vouchers and favorable interest holiday loans.</p> <p>Extended bank holidays for citizens.</p> <p>Certifications.</p> <p>Holiday insurances.</p> <p>Providing emergency medical support.</p> <p>Border scans and capacity audits.</p> <p>Health protocols for safe travel.</p> <p>Safe labels for the sector.</p> <p>Cancellation refund delays.</p> <p>Disinfection and sanitation of facilities.</p> <p>Information provision.</p> <p>Organizing FAM trips.</p> <p>Reducing tax rates on tourism services.</p> <p>Travel bubbles with similar risk countries.</p> <p>Establishing recovery committees.</p>
Long-term	<p>Hygiene standards.</p> <p>Enhanced SME support.</p> <p>Lifting travel restrictions.</p>	<p>Market diversification.</p> <p>Marketing communications and image creation on safe destination.</p> <p>Restoring traveler confidence.</p> <p>Strengthening domestic tourism and family tourism demand.</p> <p>Sustainable tourism measures.</p>

Source: UNWTO (2020d)

These actions are essential, but to reopen the tourism economy successfully and get businesses up and running, more needs to be done in a coordinated way as tourism services are very interdependent. The journey towards full recovery is safer when mitigation strategies are properly designed, effectively implemented and constantly monitored to measure their efficiency. Thus, understanding the effectiveness of different government interventions and subventions for different tourism stakeholders might result in a better design of the facilitating environment for a more resilient tourism industry.

i. Generic Support

Interventions ranging from subsidizing the health system, tax holidays, financial incentives, fiscal measures, credit facilities to employment support are already used by governments to help the economy survive Covid-19. Interest rates, exchange rates and import/export regime changes are also used to overcome the economic impacts of Covid-19. General support for individuals, postponing mortgage payments, and providing cash support were also used.

For example USA introduced a 290 billion generic support including direct payments (up to 1700 USD pP) for citizens. Grants were also offered to businesses to be used on payroll (at least 60%) rents, mortgages and utilities. Government also allowed businesses to carry net operating losses from 2018, 2019 and 2020 to the previous 5 years and amend previous tax returns to get a refund. An accelerated depreciation within the same year was also allowed for companies in the US (WTTC, 2021).

Australia provided cash flow support upto 25.000 USD for SMEs and Jopkeeper payments upto 50% which help businesses pay salaries. Accelerating depreciation deductions and upto 50% deductions were allowed. A loan guarantee of 50% was also provided to encourage financial organizations to lend money to businesses. Brazil introduced a 9 billion USD unemployment fund. Up-to 1375 subsidies were spared for each employee in Canada to support businesses, maintain their employees. Tax deferrals, low interest free loans, rent reliefs, loan guarantees were also used as generic economic measures in Canada. Chile also used tax reliefs, accelerated depreciation of fixed assets, postponing mortgages, and compensating 70% of the drop in income, expanding coverage of unemployment insurance and injection of liquidity to SMEs. Training in business and digitalization were also offered (WTTC, 2021).

China reduced the medical insurance payments of employees, tax relief, offered lower financing costs, and credit risk sharing policies to increase SMEs financing from banks. Columbia provides 50% of the minimum wage for businesses to support workers. Denmark offers 75% of revenue loss compared to last financial year. 70% loans guarantee is also offered to bank credits. Postponements of rents, water, gas and electricity of SMEs, short-time working and partial unemployment funds upto 70%, subsidized training courses, offering compensation up to 10.000 Euro per month for quarantine closures and turnover losses, guarantee schemes and credit insurance to support bank financing were used by the French Government as generic crises measures (WTTC, 2021).

Germany introduced a matching fund to facilitate investments, a 90% loan guarantee was introduced, employees with reduced working hours were supported with up to 87% of their net income, and tax reliefs were also introduced. Germany also supplied 50 billion Euro for SMEs and the self-employed. Hong Kong offered 50% for employment salaries, and 7500 USD to about 215000 self-employed people. Hong Kong also matched training programs, also offered 5800 USD allowance for eligible trainees. 100% financing guarantee was also offered for SMEs. electricity, water, sewage charges were also subsidized up to 5000 USD per account. Iceland also subsidized up to 85% of salaries. Salaries during quarantine were also fully paid by the government. Self employed also received 80% of their 2019 income. Taxes were also deferred and interest rates were lowered with a 50% government guarantee on loans (WTTC, 2021).

Italy also offered debt securities, investment incentives and soft loans for SMEs. Government also paid 80% of employee salaries while self-employed were offered emergency income of up to 1200 Euro payment and suspended mortgage installments and taxes. Netherlands is offering up to 90% wage compensation. 4000 Euro was offered to entrepreneurs affected by the pandemic. Bank guarantees were offered to SMEs up to 90%, the credit interest rates were reduced, investors were also provided venture capital guarantees up to 50%, some taxes were also deferred (WTTC, 2021).

New Zealand offered cheap credits and up to 1800 USD for each full-time employee to support cash flow. Social security and tax exemptions were offered in Portugal, also offering up to 66% of the basic remuneration to employees staying home. Sweden government assumed full costs of sick leave, provided 70% guarantee on loans and matched 50% of commercial rent

which also applies to hotels and restaurants. 75% of staff salaries are also paid by the government (WTTC, 2021).

Switzerland paid 80% of daily wages to freelancers including guides, drivers and so on. Taxes, social insurance contributions were also deferred. The UK offered funds up to 25.000 GBP for retails, hospitality and leisure businesses and an 80% guarantee on loans. Moreover, the UK subsidized a 6 billion pound support package for health services. Up to 80% of wages were also provided, with full coverage for employees under quarantine. A test and trace support were also provided for people on low income (WTTC, 2021).

Scanning travelers, introducing quarantine measures, providing emergency medical support, disinfection and sanitization, raising hygiene and awareness, information provision were also used during previous epidemics including SARS, H1N1, MERS and Ebola (Dombey, 2003; McKercher and Chon, 2004; Jamal, 2014; Novelli et al. 2018). General support targeted to all organizations were also used by tourism businesses. These are particularly the case for financial support, employment support and SME support. For example in Germany SMEs up to 10 staff were supported with 15.000-Euro per month. It is estimated that more than 40.000 SMEs in tourism have made use of these funds. Yet, Covid-19 survival in tourism requires more intense and targeted response strategies from the public.

These generic supports are also less effective when countries have significant informal economies which is the case for most OIC member countries. If a compensation is offered based on previous income, the records of previous income should be reliable, or if an employment support program is to be delivered, all employees should be registered at the insurance system. Hence such incentives and subsidies can also be used to encourage businesses to register.

ii. Tourism Specific Support

Tourism is among most affected industries from Covid-19, like many service sector businesses that require human interaction and mobility (Baker et al. 2020). Yet, governments are criticized for being late and inefficient in addressing the needs of the tourism industry. For example, Jones and Comfort (2020) discuss that most stimulus packages (e.g. employment support) are designed for large businesses (e.g. organizations with a certain amount of revenue) neglecting the needs of SMEs operating in the tourism industry. Tourism specific support can be grouped under two categories. Interventions targeted to stimulate tourism demand (e.g.

holiday loans for public) and subventions to help supply sustain businesses (e.g. tax holidays and deferrals). For example travel agencies in Germany were supported by government guaranteed credits up to 800.000 Euro. Australian government also announced a 430 million USD aid package for the aviation industry in Austria.

1. Subventions targeting the industry

Tax holidays for organizations, credit facilitation (postponed payments, low interest rates, government guarantees), employment subsidies (short-time work compensation, wage subsidies), were popular strategies during past crises including Food & Mouth Disease in the UK (Sharpley and Craven, 2001). Non-financial support is also provided including advisory services, certification, auditing and information provision.). No-show and cancellation fees are also waived in most countries, offering replacement tickets and vouchers for later use instead of immediate refunds.

Germany used 3 billion Euros to support TUI, the tour operator conglomerate. Governments also guaranteed future coupon payments for tourists after their holiday cancellations. Italy also offered an employment package covering 80% of tourism employees. The total support by the Italian government reached 25,6 billion Euros directly to the industry. Italian government also introduced a holiday voucher for domestic tourism. Alitalia was also subsidized by a 500 million Euro fund and another 2 billion Euro was spared to be used by hotels for investing in social distance processes (TURSAB, 2020).

Australia provides cash grants up to 6,500 USD for tourism SMEs and 100,000-USD for tour operators. Infection control training is also offered free of charge to the tourism industry. MICE industry is also supported by covering 50% of trade show costs (space hire, design, travel and accommodation). Australia also uses this as an opportunity to invest in tourism related infrastructure and a 100 million AUD is spared to boost local infra-structures. Australian government also announced a 430 million USD aid package for the aviation industry in Austria and Colombia suspended parking charges for aircrafts. Scandinavian Airlines was supported by a 300 million USD loan guarantee made available by Denmark and Sweden (WTTC, 2021).

Brazil also announced a 12 month extension for reimbursement for the tourism industry including aviation. Loans, tax reductions and reduced interest rates were also used in order to help Brazilian tourism survive Covid-19. French government spared a 63 billion Euro fund to support the tourism industry. 8,5 billion of this fund was used to pay 70% of the wages of tourism employees. Moreover France also introduced a crisis committee to engage the private

sector on the support programs design. French government created a Tourism sector Committee which brings together the public and private sector to monitor and act on the impact of crises on tourism. Lufthansa was supported with a 9 billion Euro fund in Germany. TUI also received around 4 billion Euro support from the German government (WTTC, 2021).

Hong Kong SAR to help airlines with cash flow and save the tickets for the future. Hong Kong purchased 500.000 airline tickets to be used in the future. 98% of all licenced travel agents in Hong Kong are offered a 80,000 HKD one-off subsidy. Travel agencies were also offered ad 5000 USD for each employee. Accommodation units were offered a one time grant of 80.000 HKD. Cruises were also targeted, and port rent and management fees were waived. Drivers, tour guides were also offered a one time 6,700 USD. Tour operators were also kept exempt from gathering limitations of up to 30 people provided infection control measures are followed. Transportation companies (coach, ferries) were offered 100% reimbursement, and taxi drivers were offered a 6000 USD subsidy per month. Catering companies were offered up to 2.2 million USD, the total subsidies amounting around 10 billion USD. For aviation up to 1 million USD per aircraft was provided. Air navigation licencing fees and charges were also reduced (WTTC, 2021).

Lodging tax were suspended in Iceland, insolvency securities of tour operators were also reviewed allowing a substantial tied-up amount to be included in the cash flow. Infra-structure, renovation of Convention centers, harbors, roads and airport extensions were funded. Technology development was also subsidized in tourism. Tourism in Italy counts as 13% of the economy. Italy created a 500 million fund to support the aviation industry, mainly Alitalia. Social distancing and hygiene requirements were also supported by a 2 billion aid. Renovation credits and employee support up to 1000 Euros were delivered. Netherlands supported KLM Airlines with a 1 billion Euro loan and a guarantee of 2.4 billion bank loan. New Zealand also offered a 580 million USD loan to the national carrier and an additional 400 million USD to the aviation industry (WTTC, 2021).

New Zealand also offered funds to pay up to 7.5% of cancellations that are funded to the clients. Rent exemptions and tax deferrals were offered to the tourism industry in Portugal. Advisory services were also established for the industry such as creating an advisory team at Turismo de Portugal offering services, information on financial instruments available for tourism, a knowledge management platform was also established, monitoring tourist flows and data and creating market reports. 250.000 Euro support was also allocated for electricity, water,

gas and cleaning costs of accommodation units. Portugal also subsidized $\frac{2}{3}$ of the tourism employee wages. Tour operators were offered 200 million Euro, Restaurants with 600 million euro and hotels with 900 million Euro. Other tourism SMEs were spared with a 60 million Euro support package. Russia also introduced a 25% matching program for domestic tourism (TURSAB, 2020).

Singapore also covers 50% of the costs of third party cleaning and hygiene pandemic measures to receive a “Clean Certification”. The country also waived license and membership fees, paid 90% of training costs, 70% of salaries and up to 1000 USD for freelance income was offered. Aviation industry was also supported with 187 million USD. Some aviation personnel were offered jobs at hospitals. Aircraft landing fees, rental fees and parking charges were rebated. A wage support was also offered up to 75% to tourism employees. Singapore is one of the few countries that have extended wage subsidies until Sept. 2021 already (WTTC, 2021).

Spain introduced a 4,2 billion support program for the tourism industry. Sweden also offers a 5 billion SEK for aviation in the form of loans 1.5 billion SEK of which is dedicated for SAS. The UK is one of the countries that tried to decentralize its tourism support through DMOs, and spared 1,3 million to aid regional recovery managed by local DMOs. Tourism SMEs were also provided with a 5000 GBP Grant to survive Covid-19. VAT in tourism was also reduced from 20% to 5% and closed establishments were able to receive 3000 GBP per property every month during the closure. Scotland also provided a 10.000 GBP grant support for hospitality, aviation industry with a up to 8 million GBP fund for each commercial airport. The USA also offers 32 billion USD to support its aviation industry (WTTC, 2021).

2. Subventions to stimulate demand

Eggers et al. (2020), also discuss the role of governments in mediating the impacts of crises and adopting appropriate policies to enhance capacity utilization in tourism. Targeted measures were used during crises particularly to enhance domestic tourism and crises resistant markets. For example, during the Asian financial crises in 1997 Malaysia launched a Cuti Cuti Malaysia campaign to create a holiday culture and encourage more Malaysians to travel to nearby destinations in the country (De Sausmarez, 2004). This campaign was re-deployed thereafter in 2009 and 2015 to facilitate domestic tourism. Market diversification and product diversification as long term strategies also appear to be popular tools to improve crises resilience. Singapore, in order to mitigate the financial crisis created promotional campaigns and new products to attract more tourists from overseas markets (Henderson, 1999). Tax

holidays and reliefs, extended lines of credit and repayment holidays, employment support were also used by the UK government to overcome the impacts of Mouth and Foot disease on the tourism industry (Sharpley and Craven, 2001).

Facilitating and encouraging *domestic tourists* in times of economic downturn and during the immediate aftermath of an event that disrupts normal tourism operations can also be an important means of filling the void left by international tourists. Many destinations focused their marketing and promotional efforts on domestic and neighboring countries during the economic and financial turbulence of 2009 since during such times tourists tend to travel closer to home or stay in their own country – the so-called *staycation*. In that period of economic uncertainty, several destinations such as China, Brazil and Spain, saw domestic tourism replace the fall in international tourism (COMCEC, 2017).

The benefit of targeting domestic tourists after a natural event or other form of manmade disruption to the tourism sector is that, because they are living in the country, residents are more likely to be fully aware of the real situation than those outside the country who are largely reliant on media reports. For example, during the financial crises in December 2008, the Thai government cooperated with the private sector to organize a “Thai Travel Fair”, cutting prices of local airlines and hotels, which increased the quantity and frequency of domestic travel. In 2010, Thailand introduced a personal taxable income deduction for Thai residents on domestic tourism-related spending.

Domestic market is the first market to recover and usually the first segment to return to Covid-19 levels. As of October, 2020 domestic travel in China and Russia returned to 2019 volume (UNWTO, 2020c). ICAO also reports international air capacity to decrease more (-62%) than the domestic air capacity (-32%). Providing holiday loans and applying reduced tax rates for consumption of tourism services, organizing FAM Trips for tour operators, and introducing travel insurance systems, creating travel bubbles, and promoting safe destination images were also found to be successful epidemic crisis measures (Wang, 2009). Governments are also responsible for reassurance of tourists and establishing safety and attractiveness of the destination. Canada offered 30 million CD for territorial marketing organizations. Denmark offered a Guarantee fund for travelers and provides compensation for cancellations stemming from bankruptcy of service providers, thus protecting travelers. Denmark also introduced #baredenmark campaign encouraging Danes to have their vacation in Denmark with a 700 million DDK budget. Sectoral health protocols in tourism, facilitating support for

accommodation of military and medical personnel in hotels and launching a communication campaign to support the recovery were also activities of French government (WTTC, 2021).

Germany also introduced a guarantee on package tour sales and if the tour operator suffers bankruptcy the refund is provided by the government. Hong Kong also created a 90 million USD for external promotion through the Hong Kong Tourism Board. Iceland allocated 1.5 billion ISK vouchers to stimulate domestic tourism to be spent through the Icelandic Travel Industry Association. Investment acceleration and marketing campaigns are also planned in Iceland for Tourism. Italy offered a 500 Euro holiday bonus for families to be spent on domestic accommodation. Portugal develops additional communication strategies to inform tourists about protection restrictions and contact, they also develop a marketing campaign called #cantskipportugal. Singapore also offered 320 million SGD to encourage local tourism in the form of credits (WTTC, 2021).

b. Private Sector Mitigation Strategies

Targeting market segments that are less risk averse than other main international tourist market segments and using the feedback (through social media) from those tourists can be an effective strategy to speed up recovery. In Nepal, less than a month after the 2015 earthquake the NTB (Nepal Tourism Board) shared a link to a Travel Weekly article headed 'Adventure travellers leading the way in Nepal's tourism recovery'. The technique of using social media to target 'prosumers' - consumers who create and share social media content quickly and easily, thereby spreading the word and influencing a wide range of audiences - can create marketing efforts that are inexpensive but achieve high impact.

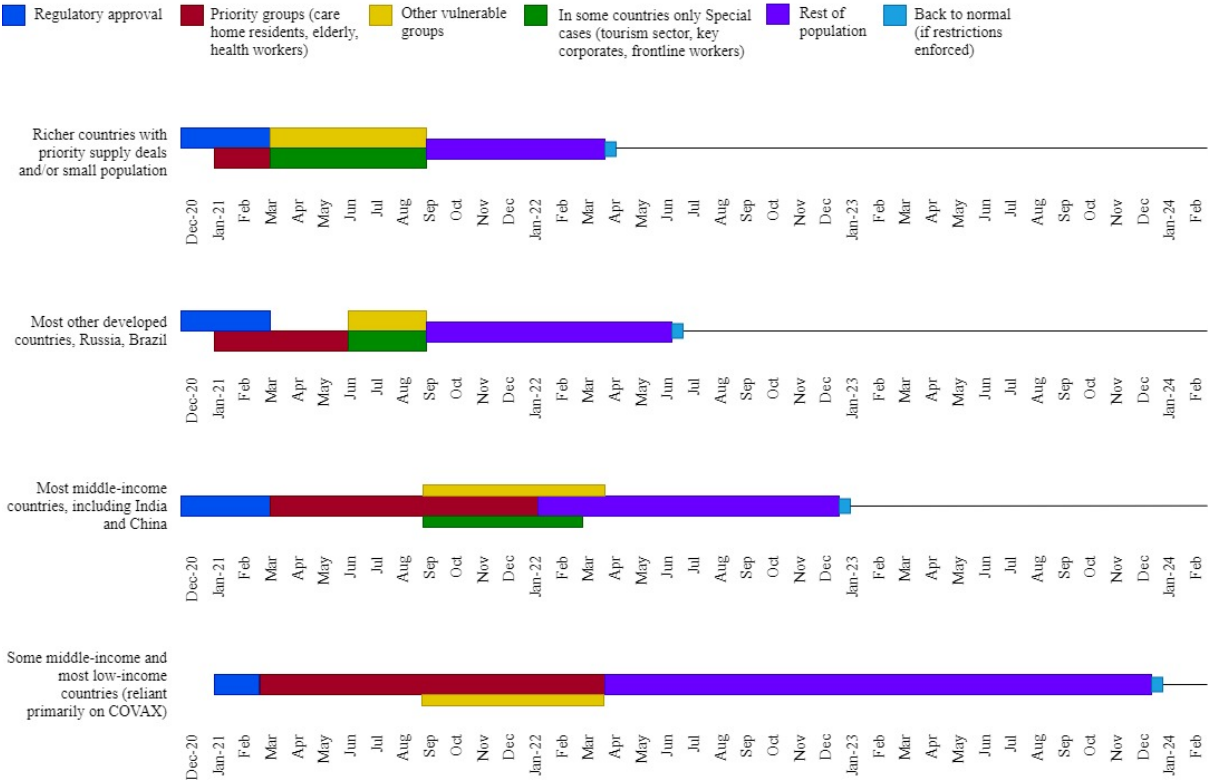
According to TURSAB (2020), providing disinfectants, enforcing social distancing and capacity restrictions, staff wearing special clothes and using additional hygiene measures are important factors for creating tourist confidence. Leta and Chan (2021) also listed crisis response strategies of tourism industry as follows; offering unpaid leave, reducing working hours, increasing outsourcing, investing in staff training, replacing high with low-paid employees, improving service quality, integrating ICT, reducing prices, product diversification, limiting services, revisiting cancellation policies, differentiating image, enhancing branding, increasing niche marketing, cooperative marketing campaigns, market diversification, focusing on local markets, creating safety image, implementing loyalty programs, enhancing electronic marketing, enhancing CSR, offering sales promotions, extending credits, reducing costs,

postponing maintenance and investments, applying for government support, setting up safety and hygiene procedures, and lobbying for support.

4. Transformations facing the industry

Despite UNWTO (2020c) expects international tourism volume to recover after the second half of 2021 and reach pre-crisis levels between mid 2023 and end of 2024, there are different scenarios on when the industry will recover, what new challenges and standards will be imposed, who are more likely to travel which products and services will disappear and transform. Hence the stakeholders should be able to create different action plans for each scenario to be put into action after recovery. Destination images shall also be re-positioned based on safety, health and cleanliness.

Figure 7. Global Covid-19 Vaccination



All stakeholders should create risk and crises management plans and a strong financial structure to improve their resilience for possible crises in the future. It is no longer enough for managers to consider “if” a system will fail but rather “when” that failure will occur, “which type,” “how” it will develop, “where” in the system, and “who” and “how” it will affect. Therefore, organizations should strive to have the frameworks and capabilities to cope with

high levels of uncertainties and the seemingly increasing magnitude of crises events (Santana, 2004).

Each crisis can also be approached as an opportunity. Tourism crises can lead to transformations and positive outcomes through the generation of new knowledge, relationships, and policy. Some destinations, for example, have reduced their reliance on key markets, understood their vulnerability, recognized the importance of domestic tourism, increased government support and funding for tourism, developed new products, and tourism-related policies (Blackman and Ritchie, 2008).

Governments also recognized the importance of collaborative response and the significance of DMOs. A major portion of tourism organizations with cash flow problems are also liquidated disturbing the balance between demand and supply. Hence we might expect an increase in prices after recovery until the supply reaches the balance. Some segments will suffer such as the business and MICE travel, some others will become more popular including nature-based tourism. It also seems that private cars and trains will become major modes of transportation rather than busses and airlines.

The impact of pandemic on a destination and perceived role of government changes based on several factors including the spread of virus and other health related issues (e.g. infrastructure) but also the characteristics of the destinations. The composition of source markets, the nature of tourism product (e.g. urban vs rural), the share of tourism in wider economy, the structure of tourism industry (branded vs independent), the size and composition of tourism supply (e.g. SMEs.), the strength of domestic tourism demand and so on. Thus customized solutions and interventions might be required for different crises and destinations.

Another issue that requires attention is the government subsidies in merely postponing taxes and offering loans to be paid post Covid-19. Tourism industry already had some problems with liquidity and there are doubts whether these future obligations can be met in the future. It is clear that tourism businesses, even if they survive the crises, majority will face the worst balance sheet in their history and serious debt problems. Despite such cheap credit measures to preserve liquidity, solvency of tourism firms are threatened in the long run. Governments should also be agile to consider debt relief after Covid-19 before it is too late to recover.

To conclude the industry is likely to see various transformations such as increased cost per tourist because of social distancing, hygiene measures and other operational costs; reduced

capacity, increased competition, utilization of ICT and AI technologies, image building on safe image.

b. Covid-19 and OIC Member Countries Overview

The OIC Member Countries are located on four continents. Besides their geographical heterogeneity, the Member Countries do not constitute a homogeneous economic group due to their different development levels. Most of the Member Countries are developing countries and 21 of them are among the Least Developed Countries (LDCs). Given these conditions, tourism might play an important role in their sustainable development and poverty alleviation. As discussed above tourism has the potential to generate much needed foreign exchange and employment for these developing countries. The multiplier effect created by tourism also has the potential to trigger development in various other sectors, including but not limited to agriculture, finance, construction, transportation, textiles, health and so on (COMCEC, 2019).

According to WTTC, the total contribution of Travel & Tourism to OIC GDP in 2018 was \$589.3 billion (8.8% of GDP) in the OIC member states. Total contribution of travel and tourism on employment was 7.4% in 2018, which corresponds to 44.2 million jobs. Tourism is expected to create 59.4 million jobs by 2029 (WTTC, 2019). The total contribution of travel and tourism to employment in OIC member states was 42,982,500 jobs in 2017 (7.3% of total employment) (WTTC, 2018). Leisure spending (inbound and domestic) in OIC member states generated 76% of direct travel & tourism GDP in 2017. Globally, tourism has created 319 million jobs in 2018. Therefore, one in every five new jobs was created by the tourism industry within the past five years (COMCEC, 2019).

Table 4 displays the contribution of tourism to the OIC economy. Because of its multiplier impact, many countries have embraced tourism as a tool to boost their economy. GDP contribution of travel and tourism is relatively high in countries like Maldives (39%), Albania (8.5%), Gambia (8.2%), and Morocco (8.2%). As the tourism sector is vulnerable to crises, these countries are particularly more sensitive to epidemics, economic fluctuations, and to international political events. According to the WTTC data for the year 2017, countries with little reliance on tourism as part of GDP include Uzbekistan and Gabon, travel and tourism makes up about 1 percent of total GDP in each. These countries are less dependent on the tourism industry in their economy. It is important to note that diversification in an economy is healthy, however if a country or region becomes dependent for its economic survival upon one

industry, it can put major stress upon this industry as well as the actors involved to perform well.

In 2017, Travel & Tourism directly supported 2.8% of total employment in 48 member states. Tourism continues to be an important economic sector capable of the creation of employment opportunities and poverty alleviation. According to COMCEC (2019), 16% of total employment depends on travel and tourism in the Maldives. The direct contribution of travel and tourism was also 7.7% in Albania, 7.3% in Jordan and 7.1% in Morocco in 2017. However, in some countries like Uzbekistan, Chad and Gabon, travel and tourism contribution is less (1%) than other sectors.

Table 4. Economic Impact and 2028 Forecasts of Tourism Industry on OIC Economy.

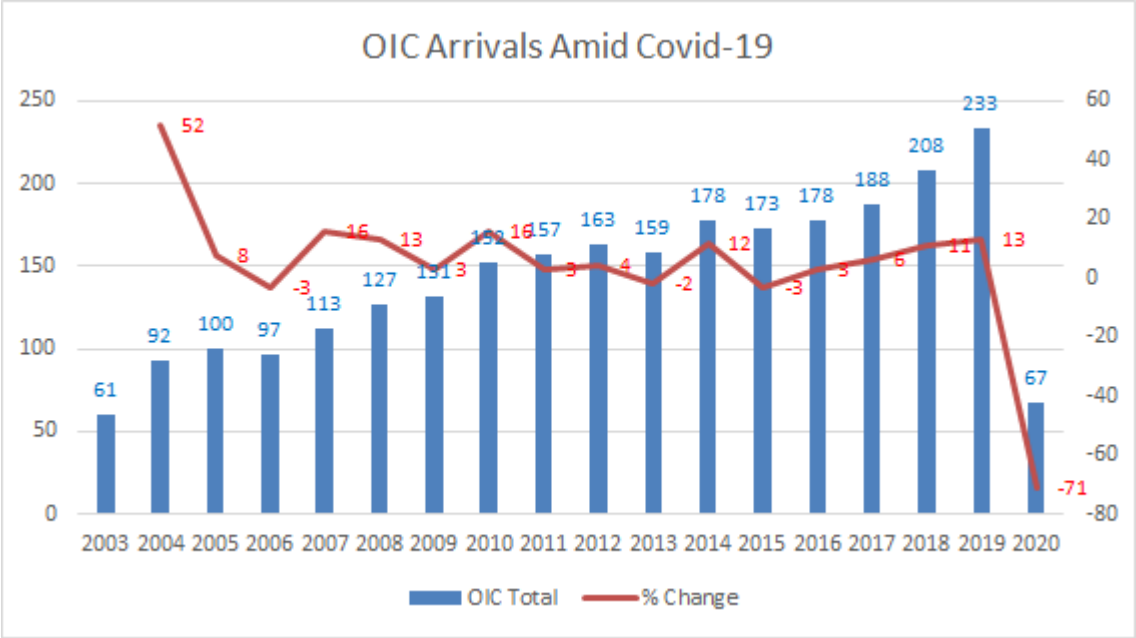
COMCEC	2018- \$ billion	2018% of total	2019 Growth ²	2028 \$ billion (Forecast) ¹	2028 % of total (Forecast)	Growth ³
Total contribution to GDP	589.3	8.8	5	926.1	9.2	4.7
Total contribution to employment⁴	44.2	7.3	2.6	57.588	7.7	2.7
Leisure spending	293.5	2.5	5.0	477.8	2.5	4.5
Business spending	93.2	0.8	3.2	152.5	0.8	4.7
Capital investment	104.4	6.3	3.9	183.0	7.1	5.4

¹2018 constant prices and exchange rates; ² 2018 real growth adjusted for inflation (%); ³ annual real growth adjusted for inflation; ⁴million job. Source: COMCEC, (2019)

The tourism and hospitality industries of the OIC member countries have been facing various crises, most of which are societal and political challenges. Various natural disasters (floods, cyclones, tsunamis, earthquakes etc.) and epidemics (Ebola, Sars, H1N1, Covid-19

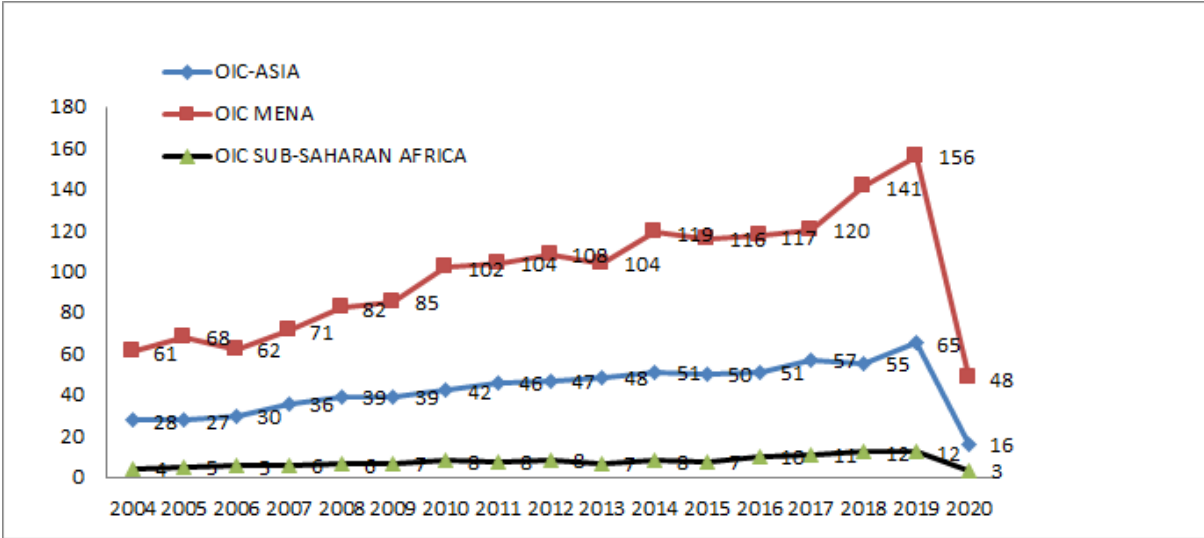
etc.) also affected the OIC countries. Before Covid-19, however, these impacts were relatively short-term (COMCEC, 2017). Covid-19 has created a large decline in international tourism arrivals and receipts in OIC countries as displayed in the figures below.

Figure 8. OIC Arrivals amid Covid-19



Source: UNWTO (2020c)

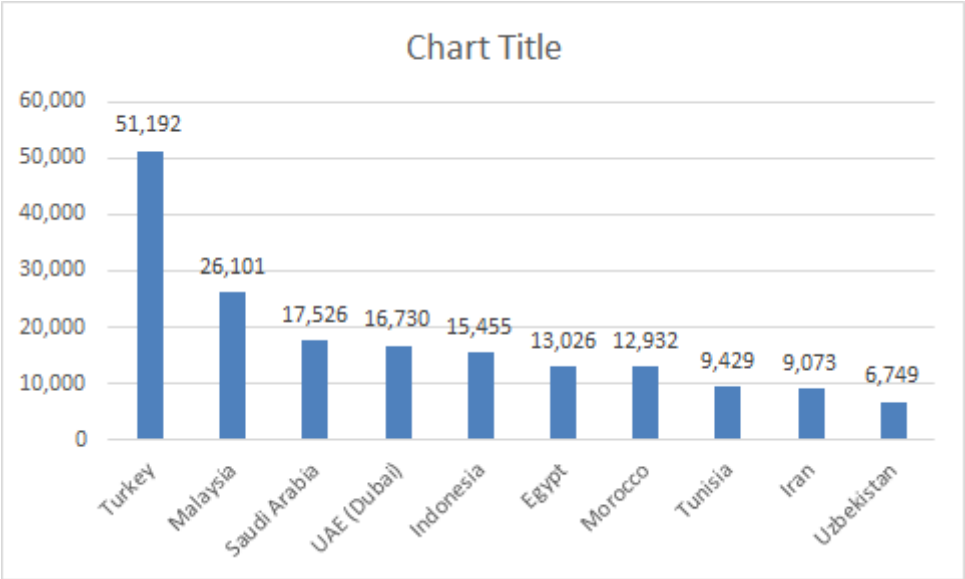
Figure 9. OIC Arrivals amid Covid-19 - Regional



Source: UNWTO (2020c)

Figure 8 and figure 9 display international tourism activity in the member countries in terms of tourist arrivals since 2004. Because of lack of data on the number of tourist arrivals and tourism receipts of some countries, estimates are made. During the 2010-2014 period, shown in figure 8, there was a trend of increasing tourist arrivals, however, in 2015 the number of tourist arrivals decreased from 178 million to 173 million in the OIC Member States and reached 2014 numbers back in 2016. And continued to grow until it reached 233 million in 2019. With Covid-19 OIC regions experienced a sharp decline (71%) in the number of arrivals during 2020. OIC-MENA experienced a 61% decrease in arrivals, whereas tourist arrivals to OIC-Asia and OIC Sub-Saharan Africa decreased by 75%.

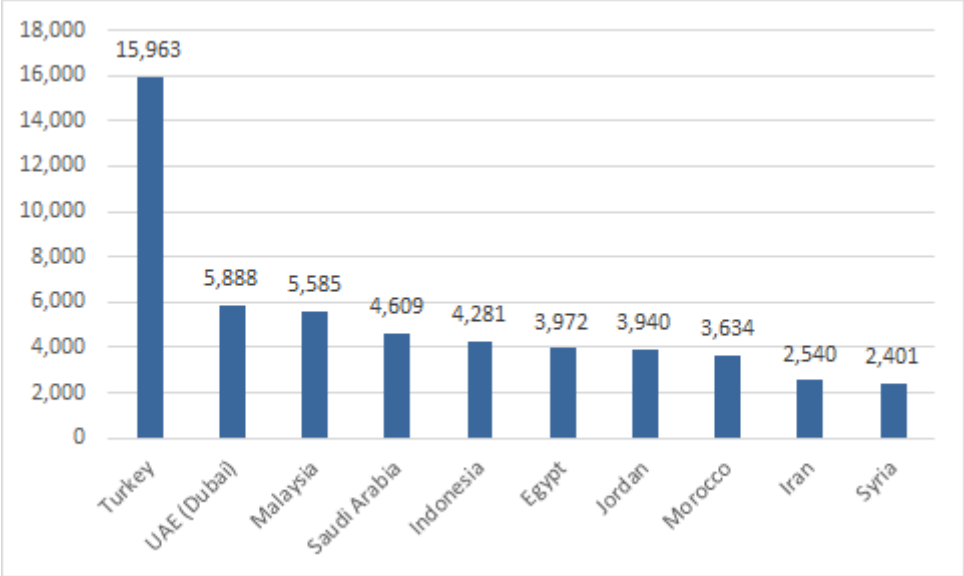
Figure 10. Top 10 Destinations in OIC in terms of Arrivals in 2019 (millions)



Source: UNWTO (2020c)

The distribution of the tourist arrivals among the OIC Member States has demonstrated the fact that international tourism in the Member Countries is concentrated in a few countries. In terms of tourist arrivals, Turkey, Malaysia, Saudi Arabia, UAE (Dubai), Indonesia, Egypt, Morocco, Tunisia, Iran and Uzbekistan were the top 10 international tourist destinations among the Member Countries in 2019. As shown in the Figure 10, these 10 countries together hosted 178.2 million international arrivals in 2019.

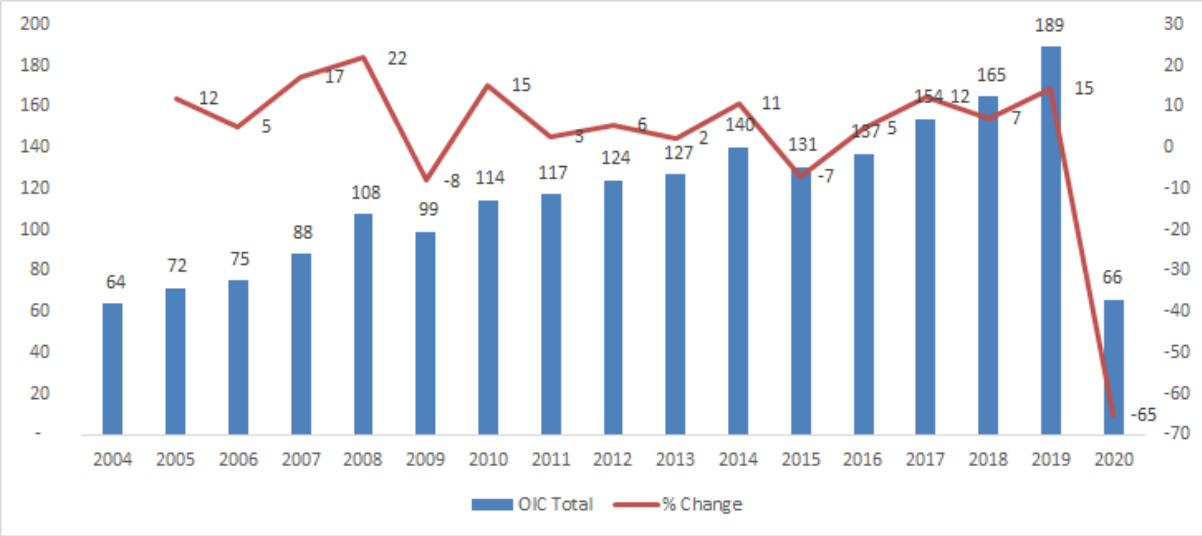
Figure 11. Top 10 Destinations in OIC in terms of Arrivals in 2020 (millions)



Source: UNWTO (2021)

Figure 12 below on the other hand displays the top 10 destinations in 2020. All major destinations in OIC experienced significant declines amid Covid-19.

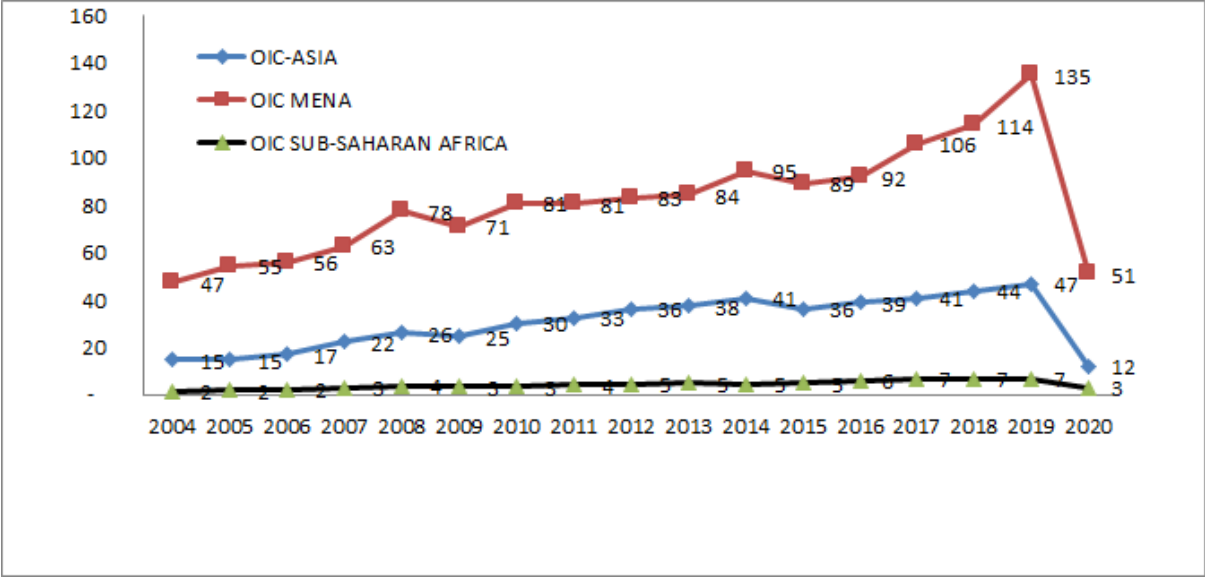
Figure 12. OIC Receipts amid Covid-19



Source: UNWTO (2020c)

A parallel picture is observed in terms of receipts, with minor exceptions in 2009 and 2015 OIC tourism receipts continued to grow and hit 189 billion USD until a significant decline in 2020 because of Covid-19. Concerning receipts, OIC experienced a 65% decrease in receipts with OIC-ASIA and OIC-MENA losing 74% and 72% of their receipts, while OIC-Subsaharan Africa experienced a 57% decline in tourism receipts in 2020.

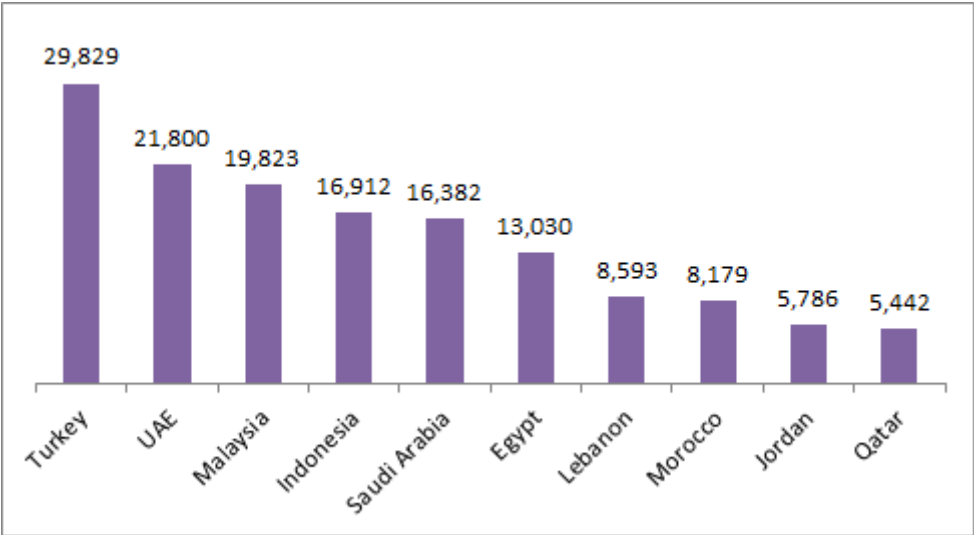
Figure 13. OIC Receipts amid Covid-19 - Regional



Source: UNWTO (2020c)

The distribution of the tourism receipts is also concentrated in a few countries within OIC destinations. In terms of tourist receipts, Turkey, UAE (Dubai), Malaysia, Indonesia, Saudi Arabia, Egypt, Lebanon, Morocco, Jordan and Qatar were the top 10 international tourist destinations among the Member Countries in 2019. Most OIC countries did not yet report the 2020 statistics. As shown in the figure 14, these 10 countries made a total 145,8 billion USD of the 189 billion USD OIC tourism receipts in 2019.

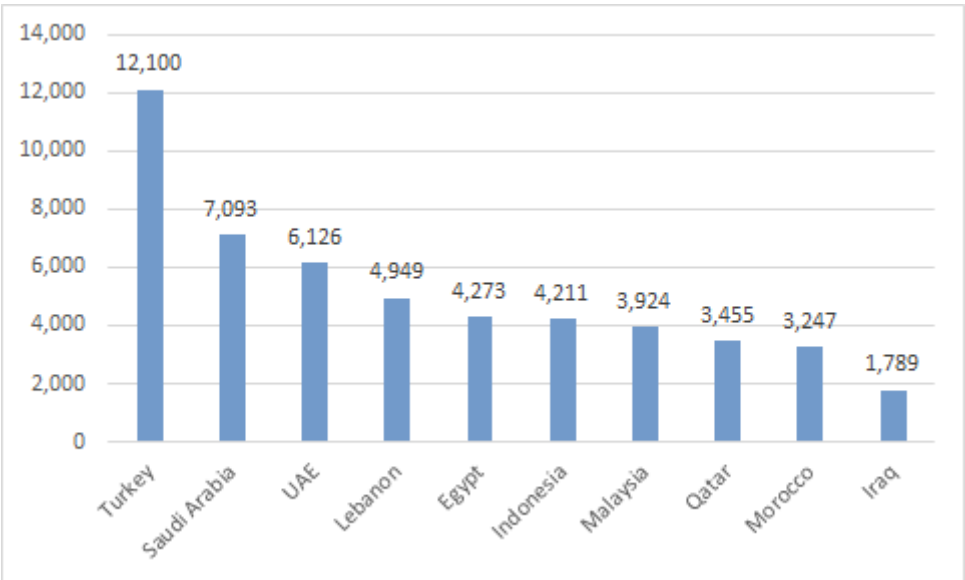
Figure 14. Top 10 Destinations in OIC in terms of Receipts in 2019 (billion USD)



Source: UNWTO (2020c).

With the negative impacts of Covid-19 we see sharp declines in tourism receipts of major OIC destinations. Figure 15 below exhibit 2020 receipts of top 10 OIC destinations in terms of receipts.

Figure 15. Top 10 Destinations in OIC in terms of Receipts in 2020 (billion USD)



Source: UNWTO (2021).

To conclude, member countries need to find new ways to adopt the new normal in tourism and provide support for the growing tourism industry at OIC. Destinations also need to consider ways to establish “safe travel corridors” and “travel bubbles” among OIC countries. OIC can also use these crises and lockdowns to restructure tourism and to create a more

competitive and resilient industry. Safety and security concerns and political stability are also emerging as major challenges for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats and health concerns. Epidemics, terrorist incidents, refugee crises are still important obstacles for tourism in the region. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of OIC destinations.

Besides risk and crises management strategies and recovery measures OIC governments should also focus on long term competitiveness of their tourism industry. Enhancing entrepreneurial activities in tourism might for example enhance utilization of tourism potential within OIC, trigger innovation and destination development. Investing on infra-structure in OIC destinations, adjusting the legislation and bureaucracy for and creating a better investment environment by subsidies, credits, land allocations, tax reductions, offering capacity building programs for local human resources and discriminating local entrepreneurs, intra-OIC investors and brands and facilitating sustainable planned development of member country destinations are alternative strategies particularly amid Covid-19. Unfortunately, despite Covid-19 being a major crisis, OIC countries have already been facing various other crises besides the past epidemics including political conflicts, terrorist events, natural disasters and so on. Hence, OIC also needs to prepare and establish risk and crises management procedures to create a more immune and competitive tourism industry.

This is also a period of investment and capacity building and work-out long standing problems within OIC tourism. Among these problems are low service quality, low per capita tourist spending and leakages from local economies. Tourism industry in the OIC has been developing at a rapid pace. Yet the increase in income generated in tourism is well below the growth rate in the volume. Therefore, OIC tourism is not able to reflect the volume increase in per capita spending. The average tourist spending was around 750 USD below the crises, which is well below the global average of 1000 USD. Yet, Covid-19 succeeded to increase per tourist spending to 985 USD in 2020 in OIC countries. Hence, there are also some opportunities if member countries invest in tourism service quality and try planning the disturbed balance between tourism supply and demand in a sustainable manner.

One reason for this low per capita spending is scarcity of tourism activities and low quality in services. Because of limited human and financial capital, OIC countries tend to import know-

how in the form of franchises. Despite international brands and management firms enhancing the service quality they also create substantial leakages from the economy in the form of profits and commissions transferred to the franchisor, foreign staff wages and management fees. One way to solve these obstacles is encouraging tourism entrepreneurship and building local entrepreneurship capacities.

Considering the modest share of the OIC Member Countries in the international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself in desirable levels. OIC Member States need to understand how they can strengthen the position of their tourism industry in response to current global economic challenges and remain competitive among emerging destinations, within a sustainable development perspective. Enhancing intra-OIC travel, creating travel bubbles between countries, encouraging domestic tourism and family travel, subsidizing tourism for a more resilient industry, investing in collaborative planning, crises management and branding are among other strategies to support the tourism industry. This period can also be seen as an opportunity to fix structural problems in the industry concerning sustainability, over-tourism, climate change, and destination governance.

2. METHODOLOGY

This section will detail the methodologies, data collection methods, sampling and analysis approaches used in the study. Reliability and validity of the research process will also be discussed in this section.

a. Case Study Approach

Based on a mixed study approach, this research first explores the impacts of Covid-19 and mitigation strategies on crises through a content analysis of interviews with industry stakeholders. After identifying these strategies, actual and potential interventions, a survey is designed to measure their effectiveness and impact on resilience. Clustering analysis was also utilized to identify different groups (i.e. size, operations, markets) of tourism organizations based on their resilience and individual requirements to survive crises. Understanding the characteristics of crisis resilient tourism organizations and the effectiveness of different organizational actions, government interventions, and subventions for different tourism stakeholders might result in identifying crisis strategies and a better design of the facilitating environment for a more resilient tourism industry.

i. Qualitative Stage

Given the exploratory nature of this study and the absence of established theoretical frameworks into tourism resilience and recovery during crises, a qualitative research approach using semi-structured interviews was adopted. This approach is deemed useful in gaining deeper insights into under-studied or fragmented topics (Creswell, 2007). The qualitative approach is also essential in the current investigation, considering that the tourism and travel industry has been under an unprecedented global crisis. This crisis will probably change the course of human history, with tourism and travel being no exception (Pizam, 2021). The tourism industry has already adopted various strategies to mitigate impacts of crises in human resources (e.g. unpaid leaves), operational (e.g. cost-cutting), financial (e.g. additional funding), marketing (e.g. diversification) and so on. Governments also have used a wide range of interventions ranging from tax holidays, financial incentives, fiscal measures, credit facilities to promotional and employment support to help the industry survive these crises, including Covid-19. The key objective of the qualitative stage is to identify actual and potential interventions and inform the questionnaire that will measure their effectiveness in the quantitative stage.

1. Semi-structured Interviews with industry experts

To collect the qualitative data for the present study, appointments for in-depth interviews were arranged with industry professionals occupying managerial positions at different sub-sectors within the tourism and hospitality industry. While a convenience sample technique was adopted, a deliberate attempt was also made to stratify informants across various sub-sectors within the tourism and hospitality industry, including food and beverage facilities, lodging businesses, travel agencies, and ancillary tourism businesses. This was deemed important to cover various aspects of the industry and to gain a comprehensive understanding of how different industry practitioners evaluate governmental interventions.

Semi-structured interviews were conducted for over a period of 5 weeks in February and March 2021. Given the ongoing pandemic, the interviews were conducted both face-to-face ($n= 15$) and online ($n= 6$). Upon informants' consent, the interviews were digitally recorded and lasted an average of 62 min., with the shortest lasting 37 min. and the longest lasting 153 min. Participants were ensured complete anonymity on their identities and confidentiality of their data. Interview protocol and questions were determined following a

thorough review of the relevant literature (Yozcu & Cetin, 2019; Fotiadis et al., 2021; Demirdelen Alrawadieh, 2021; Ritchie & Jiang, 2019; Santana, 2004; Pizam, 2021; Eggers et al., 2020; Hale et al., 2020). Informants were asked several questions with the aim of understanding their experience with Covid-19 and their perceptions of governmental interventions.

Overall, informants were asked to talk about how the pandemic impacted their businesses. Participants were also enquired about their short and long term strategies to reduce the effects of Covid-19 as well as their future plans to enhance the resilience of their business against similar crises. Finally, Informants were asked about the role of the government in reducing the effects of the crises in the short and long term and enquired of how satisfied they were with the government's current policies for the Covid-19 pandemic. Other propping questions were also asked to understand how informants evaluate external support made available by the government and how effective they were. The data collection process was completed with a satisfactory level of theoretical saturation being achieved following 21 interviews. These interviews were transcribed verbatim in the source language (i.e., Turkish) yielding a 120-pages MS Word file (about 150,000 words). The data analysis process is explained in the following section.

2. Thematic Content Analysis

The qualitative data were analyzed using the six-stage thematic content analysis suggested by Braun and Clarke (2006). The authors independently read the interview transcripts several times and discussed their initial abstractions and themes. As suggested by Esfehni and Walters (2018), the transcriptions were explored in the source language (Turkish) during the first three stages of thematic analysis. This method enabled a deeper understanding and better familiarity with the qualitative data, thus enhancing the quality and reliability of the extracted themes and concepts.

3. Findings

3.1. The Impacts of the Covid-19 Pandemic on Tourism and Hospitality Businesses

As discussed earlier, the tourism and hospitality industry has been severely hit by the Covid-19 pandemic. Our qualitative data provide insights into the size and volume of this impact and show how these adverse impacts have had multiplier effects involving not only revenues but also business structures and operational models. Overall, all informants (but one)

agree that the Covid-19 pandemic has resulted in a major revenue loss stemming from both reduced demand due to travel bans and mobility restrictions as well as lockdown orders. Informants reported revenue loss ranging from 40% to 95%. P8, an owner of a travel agency, noted:

“January 2020 was good for tourism. In February, we received a few cancellations, we then thought this crisis would be over around May [...] then we hoped it would be over in July and that we would get to normal life by August. Now, with 90-95% revenue loss, we strive to survive. [...]. Initially, we thought this crisis would be similar to SARS with limited and short-term impact, and therefore we did not take it seriously, [...] however, toward the end of February, we came to see how serious the crisis was. We had 20 employees and now we have only four”.

For businesses, the costs of the pandemic appear to go far beyond the economic damage with psychological distress and anxiety being common among informants who are faced with uncertainty about the future. However, as will be seen in detail throughout the next sections, it appears that businesses’ ability to proactively respond to crisis-driven market changes is crucial not only in reducing the adverse impacts of crises but also in capturing new opportunities. Interestingly, one informant claimed that the pandemic helped their business grow. P4, a travel services consultant and tour operator, noted:

“We honestly didn’t have so many negative effects on the business side, we kind of got bigger, we even hired an extra person and economically we are really good. What was even better for us is that we were already working from home. [...] Basically, during the first months of lock-downs, we only thought of how to deal with the crisis [...]. We came up with the idea of focusing on international students because we were sure if we could bring more students it would bring us more tourism business as well. You know, education is one of the few excuses for travel during the pandemic. Most of the countries didn’t apply restrictions to educational travels and, of course, we used this. The other thing that we focused on was medical tourism, [...]. At some point, we put leisure travel aside and targeted the most probable segments such as education-, business- and medical treatment-induced travelers. [...]. Even though we were happy with our overall business in 2020, we still cannot get the idea of ‘it might have been better without Covid-19’ out of our minds”.

There appears to be a consensus among informants that full recovery (or pre-crisis status) would not be achieved before 2023. Increased tourist arrivals, high occupancy rates, high average daily rates, and cruise ships and flights reaching pre-crisis numbers were frequently mentioned as key indicators of recovery. Interestingly, however, some informants expect that, if full recovery is achieved, tourism arrivals and inherently tourism revenues will even far exceed the pre-crisis period. P3, an operation manager, attributes this to the fact the

“People are extremely hard-pressed due to the stay-at-home orders. They are very eager to go out, they want to travel to domestic as well as international destinations. Thus, if the pandemic is over, there will be a serious tourism boom”.

Overall, the impacts of the current crisis are massive, and informants are generally reluctant to establish comparisons with other local (e.g., terror attacks) or regional crises (e.g., SARS). This is understandable given that damage in previous crises was generally limited in scale, with recovery being usually predictable. The Covid-19 pandemic, however, has been surrounded with immense uncertainties even after the vaccine was found. As these lines are being written (April 2021), only around 3% of the global population has been vaccinated and lockdown orders are still being applied in several countries, including Turkey. Thus, any attempt to comprehensively understand the volume and scale of the pandemic’s impacts on tourism remains immature at the moment.

3.2. Mitigation Strategies of Tourism and Hospitality Businesses.

Informants were asked to talk about their short- and long-term strategies to mitigate the effects of the Covid-19 crisis. The qualitative data reveal a set of strategies both operational and structural, including business downsizing, enhancing service quality, focus on hygiene and safety standards, re-activating idle capacities (e.g., renting conference rooms as offices), targeting diverse market segments, designing and introducing novel products (e.g., virtual tours), and relaxing cancellation procedures.

With the decreased demand and lockdown orders, the majority of businesses responded by reducing their operating costs through organizational downsizing. This is evidenced by the considerable number of employees lifted during the crisis. Others mentioned that customers during the pandemic are more sensitive to safety measures, thus ensuring high standards of hygiene and safety coupled with enhanced service quality would help survive the crises. A significant portion of the interviewed businesses highlighted the importance of product

differentiation and targeting diverse market segments noting that businesses should not “put all their eggs in one basket” (P3, P7). In this context, participants seem to have developed knowledge based on their experiences of previous local and regional crises whereby complete reliance on one market segment and one type of product could be risky.

A considerable portion of the participants lamented that, similar to previous crises, cutting prices has been a key immediate response by many competitors in the sector. P6 noted:

“Unfortunately, in Turkey, when a crisis emerges, we [hotel businesses] immediately cut prices down. This is nonsense because when there is no demand, cutting prices won’t work, it even will result in larger revenue loss”. This also confirmed by P7 who noted that: *“cutting prices during crises is common [...] but I am of the view that this is a very wrong strategy, when the crisis is over and things get normal, businesses are challenged by their desire to raise their prices again without being encountered with a demand that is sensitive to the pre-crisis prices”.*

Overall, strategies developed to reduce the negative impacts of the Covid-19 pandemic are generally limited to a set of short-term reactions oriented towards helping businesses offset their revenue loss and, in some cases, keeping a foot in the market despite the damage. Regardless of these strategies and their efficiency, the current crisis seems to have stimulated significant transformation and introduced considerable opportunities. These are addressed in the next section.

3.3. Opportunities and Transformative Power of the Crisis

It has become clear that the pandemic has reshaped the tourism and hospitality landscape giving rise to novel consumption patterns and inherently market opportunities. Based on the qualitative data, the transformative power of the current crisis is salient in two core dimensions. These dimensions were labeled as *digital transformation and innovative products and changing market structure*.

In terms of digital transformation and innovative products, both operational models and supply patterns seem to undergo some important changes. On the operational side, businesses seem to have become more adaptable to digital transformation with less dependence on staff and more inclination to adopt automated systems and AI in their operational models. While this

adoption is still in a very embryonic stage, it will probably get prominence encouraged by the growing social distancing culture and the emerging no-touch consumption patterns.

On the supply side, however, the pandemic has apparently encouraged businesses to design and introduce innovative tourism products that generate income offsetting loss in mainstream revenue while also responding to emerging travel consumption patterns. In this context, businesses have started to promote and sell virtual tours, virtual food cooking classes, and online conference services. This is well captured by P3, a major tour operator: “*for 3 months now, we have been offering virtual products including virtual tours and workshops, this has been helpful to overcome and survive the crisis*”. These innovative products come as a response to the mobility constraints due to the pandemic. It remains unclear, however, whether these transformations will stay for a longer time after the pandemic. In fact, P4, an up-scale hotel manager, noted that “*these [emerging consumption patterns] will prevail for the next two years, after that, everything will be forgotten and all will go back to how it was [prior to the pandemic]*.”

Another important aspect of the crisis’ transformative power is associated with the changing market structure. Informants mention that the crisis forced some competing businesses to exit the market, resulting in a larger market share for surviving businesses. P15 noted: “*For us, it is better when some businesses in the area close. If one near-door restaurant shuts its doors tomorrow, we would probably double our business*”. The changing market structure is also associated with a change in demand patterns. In this vein, informants note that demand has been shifting toward niche tourism products including nature-based and ecotourism. Besides, small-size family businesses such as boutique hotels have come into prominence during the crisis.

3.4. Characteristics of Resilient Tourism and Hospitality Businesses

Identifying the key characteristics of tourism and hospitality businesses that are likely to survive crises is crucial not only for existing and potential entrepreneurs but also for policymakers and other stakeholders involved in the recovery process of the industry. Based on the qualitative data, we identified several factors contributing to the resilience of tourism and hospitality businesses. While clearly intercorrelated, these factors were classified under two broad categories namely; *business type and managerial structure*, and *business responsiveness*.

In terms of business type and managerial structure, the qualitative data show that management and ownership type, business size, location, business culture (subsistence vs growth), market environment, and targeted market segment (domestic vs international) appear to be important factors determining the extent to which businesses are resilient to crisis. In this regard, small and family businesses are likely to survive as they are in a better position to control costs. This is particularly true if businesses own their own places. For instance, P15, a restaurant owner, mentioned

“Our biggest advantage is that we are a family business [all workers are the owner’s brothers] and the firm including the place is completely ours. This is an important advantage, If the place were not ours, we probably would have collapsed now”.

However, some informants also noted that chain-affiliated businesses have more resources and are in a better position to develop and implement strategies to cope with the crisis (e.g., safety standards, marketing resources). In times of crises, the location of business matters. While hotels in urban areas have experienced sharp decline in their revenues, lodging facilities such as bungalows and glampings that are located in natural areas are apparently advantaged. This is well captured by P7: *“boutique hotels in natural areas have been so lucky during the pandemic. [...] in general, hotels and glamping focusing on alternative tourism and targeting individual tourists have come into prominence. For instance, this year I myself paid 1000 TL (around \$120) for a lodging facility that used to charge only 300 TL (around \$35) in the past”.* With travel bans and mobility restrictions on international travels, businesses focusing on domestic travel trade were also more advantaged compared to those relying on the international travel market. Food and beverage businesses whose operational models heavily rely on delivery service were much more resilient to the crisis compared to fine dining restaurants. Some also mentioned that focusing on business subsistence rather than business growth is a safe track to avoid troubles during crises. Indeed, for those, using credit and loans is viewed as risky.

Other factors contributing to the resilience of tourism businesses were conceived as indicators of business responsiveness. Business responsiveness here refers to the ability and readiness of businesses to proactively respond to crises. This involves creativity and product innovation, technology adoption, and innovative marketing strategies. In this sense, responsive businesses are more likely to be resilient to crises as they tailor their products to meet the needs, fears, and preferences of their customers during the crises.

3.5. The Role of the Government During the Crisis

A key objective of this study was to examine the role of the government in helping tourism and hospitality businesses survive the current crisis. Specifically, an endeavour was made to understand what types of governmental interventions were provided during the crisis and how efficient these interventions were. Overall, participants appreciated the role of the government and described it as being indispensable to surviving the crisis. This role is perceived through a set of governmental measures oriented toward enhancing the resilience of tourism and hospitality businesses including short-term work allowance, tax reduction, tax deferral, and vaccination priority for tourism employees. Short-term work allowance was particularly deemed as an important factor helping businesses to reduce their costs associated with employees' salaries. P13 commented

“The short-term allowance has been of help for both businesses and employees. This could be improved but still the role of the government is really important [...]. Well, it [the short-term work allowance] is not enough, but during these times [...] it is an advantage”.

However, by the end of June 2021, short work-term allowance is lifted creating uncertainty and much stress for businesses.

While generally appreciated, these interventions were also deemed insufficient by some informants. It appears that “in the time of crises, any type of support will inherently be insufficient” (P5). Even the much-appreciated short work-term allowance is criticized for involving restrictive criteria to qualify beneficiaries (e.g., employees of less than two-month working contracts do not receive this allowance). Others believed that some interventions were introduced in a late stage. P15, an up-scale hotel manager, lamented:

“I do not think that the government performed well during the crisis, even the VAT has just been reduced to 1%. We had to pay our taxes at 8% and 18% [accommodation, and food and beverage respectively] for 6-7 months. These measures should have been taken much earlier”.

Despite MoCTs efforts in creating safe tourism corridors and international diplomacy for enhancing tourism movements, some informants also believed that the government should

use stronger public relations and diplomacy with countries applying travel bans to Turkey such as Germany and the UK.

ii. Quantitative Stage

Based on the qualitative stage a survey was designed and conducted on 185 tourism experts in OIC countries. The Survey looked into transformations in the market in terms of generating regions and tourist motivations. The characteristics of crises resilient organizations and strategies adopted by both private sector and public sector was also enquired. The findings as descriptive statistics are presented both in reports for each case country as well at the policy recommendations.

3. CASE COUNTRIES

4 case countries will be selected based on their geographical representation from OIC-MENA, OIC-Asia and OIC-SubSaharan Africa. The share of Tourism in GDP and seriousness of Covid-19 impacts were also used to identify the cases. (Turkey, Azerbaijan, Malaysia and Jordan). This section includes focused attention on each case country concerning the characteristics of the tourism industry in the country, impacts of Covid-19, recovery strategies and finally policy recommendations customized for each country.

The recovery from Covid-19 is not only dependent on each countries' performance in eliminating the virus within their borders but also the situation in their target tourist generating countries until Covid-19 is completely removed as a global threat. Moreover the structure of the tourism industry and tourism resources are different in each country. Therefore individual analysis and customized solutions are required in each country.

a. Case Country- Turkey

i. History of Tourism development and Characteristics

From a historical perspective, despite its potential, Turkey's tourism took longer to mature compared to other destinations in the Mediterranean region. Although some initiatives to benefit from tourism were taken as early as the 1960s, it was not until the 1980s that serious efforts were made to harness the power of the tourism industry as a means to foster the national economy. During this stage, the Tourism Encouragement Law in 1982, coupled with the liberalization of the economy, accelerated the development of tourism in Turkey resulting in a rapid increase in tourist arrivals and inherently tourism receipts (Yolal, 2016). Since then, Turkey has grown as a global tourism destination appealing to different segments within the travel market including leisure tourists, business travellers, and culture and heritage tourists.

Yet, this rapid development did come with some costs. In this vein, heavy reliance on tourism as a key source of foreign currency earnings and jobs has resulted in a tourism development approach that is incompatible with the principles of long-term sustainability (Tosun, 2001). In fact, over the last two decades, there have been increasing studies pointing to various adverse impacts of mass tourism (e.g., Kuvan, 2010; Eyuboglu & Uzar, 2020) which

apparently have influenced policy to adopt long-term sustainable tourism goals as part of the Tourism Strategy of Turkey-2023.

Considering the dependency on tourism, Turkey is also an ideal case to study the effectiveness of organizational adoption and government response to crises. Turkish tourism industry has been through a series of crises every few years since the 1980s struggling with terrorism, natural disasters, political and economic crises, military coups and epidemics. The country has also faced frequent external crises because of its geographical location in the Middle East (e.g. refugee influx, wars, religious and ethnic conflicts). These crises have had a negative impact on tourists arrivals and consequently on tourism revenues.

For instance, in 2016, tourist arrivals have declined by over 30% as a result of the terror attacks that had taken place in several parts of Turkey as of the second half of 2015 (Alrawadieh et al., 2018). Turkey's vulnerability to several types of crises is not only associated with its geopolitical position in a turbulent region, but also for the heavy media coverage these crises receive on a global scale. Considering that the Turkish economy largely relies on foreign tourist exchange earnings, reducing the effects of crises on tourism remains a major challenge for policy in Turkey.

Despite the importance of tourism in her economy, Turkey is one of the countries faced with continuous crises (Yarcan, 2007). Economic crises, exchange rate fluctuations, terrorist attacks, attempted coup, natural disasters, earthquakes, political crises, Syrian conflict, gulf wars, epidemics, Avian Flu, social unrest, Arab Spring, and refugee crises are major events that affected tourism in Turkey since the 1990s. Some of the recent crises before Covid-19 have been detailed below;

- Terrorist attacks: Tourists and civilians have been targets of various terrorist attacks in Turkey by terrorist organizations. Yet, with enhanced border security measures, and intense fight with terrorist organizations, the number of terror attacks in the country has significantly declined within the past decade.
- Gulf War: In 2003 allied forces from several nations led by the United States and Great Britain, invaded Iraq. Yet the invasion was opposed by local groups and created insurgency until 2011 when foreign forces completed their withdrawal in Iraq. Although Turkey was not directly involved in the conflict, as a neighbour, it was affected.

- **Syrian War:** The civil war in Syria is a part of a wider wave of the 2011 'Arab Spring'. The Syrian crisis has a direct impact on Turkey. Since 2011 because of the civil war in Syria as a neighbor Turkey has been welcoming more than three million refugees that cost an estimated 10 billion USD to the country. Besides the refugees that Turkey was forced to deal with, the country also became a target of terrorism which is partly related to the Syrian conflict.
- **Downing of Russian air fighter:** A Russian warplane was shot down in November 2015 by a Turkish F-16, after several warnings of continuous violation of Turkish airspace. Consequently, among other sanctions, Russia banned most charter flights to Turkey. As the second largest generating market of Turkey, this ban resulted in a decline from 4.5 million arrivals in 2014 to 3,6 million arrivals in 2015 from Russia.
- **Attempted coup:** Although Turkey has witnessed several military coups long before (last one in 1980), there has been another attempt in 2016 which faced intense resistance by the locals and failed. 294 people were killed and many others injured. Besides the violence during the attempt, there have been some criticisms after the coup in international media as to the state of emergency.

Up until 2015 although these crises have undermined the potential growth in tourism, Turkey still enjoyed remarkable growth in tourism volume. Temporary declines were always recovered and were limited in scale. Despite the tourism industry having survived various external crises in the past, the recent bundle of crises in Turkey is considered to be the most serious in the history of the country (see figure 16 below). Particularly from 2015 onwards, frequent acts of terror committed by various different terror organizations, refugee crises, international political tensions with Russia, Syria and European Union (Cankurtaran and Cetin, 2016) and most importantly the attempted coup in July, 2016, resulted in sharp decreases in international tourism arrivals. Cumulative effects of these consecutive serious events (e.g. terror attacks, an attempted coup, Syrian conflict and its political and social implications) the country recorded sharp decreases up to 40% in tourist arrivals.

Concerning the preventative risk management measures; not much is undertaken except improving safety and security measures such as improved border control. Because the central body responsible for tourism (NTO-MoCT) lacks resources and efficiency to create a comprehensive risk management structure and in the absence of regional DMOs; prevention and risk management customized for the tourism industry at the regional level does not exist.

National office under MoCT plans and implements risk, crises and recovery measures usually as reactive responses.

Concerning central response strategies however various activities were put into action. Offering incentives (e.g. financial incentives for tour operator charter flights landing to specific airports during certain periods), bank credits, postponement of taxes, rents and other fees, employment incentives (e.g. partly waiving social security contribution fees) were utilized. Yet in the absence of a structural body to represent the tourism industry and manage crises (e.g. DMOs), the responses take too long to actualize partly because of central government bureaucracy. Despite recent developments to involve the tourism industry representatives into decision making the outcomes of these efforts are yet to be seen.

As to the recovery strategies, realizing the importance of private sectors know-how and efficiency, besides the central marketing efforts by the NTO, some private sector marketing and promotion efforts (e.g. promotional material, participation to international fairs) were subsidized by 50%. After various crises and sharp declines in its major generating countries Turkey also intended to diversify its markets by improving its accessibility (e.g. new flight routes by Turkish Airlines) from Asia, Middle East and Africa. The country also adopted a more flexible visa regime towards these countries.

Product diversification also became part of strategy plans (e.g. Tourism 2023). Turkish tourism has been dependent on mass sunlust tourism. Because of the elastic nature of the demand in sunlust tourism each crisis produced a significant impact on the industry. There was a need to create various other tourism products other than the sunlust beach tourism More investment incentives were utilized for alternative special interest tourism types such as winter tourism, eco-tourism, golf tourism, culture tourism and cruise tourism. Foreign diplomacy has also been proven successful in several cases. For example Turkey has resolved conflict with Russia stemming from the downing of the Russian plane. The heightened tension with the EU during local elections in 2017 was also reduced.

Since 2017, Turkey has once more succeeded as an international destination with growing attraction, again ranking sixth among most popular destinations for international visitors in 2019. Tourism currently contributes 11.3% of the total GDP and has created 2,643.8 jobs helping with 9.4% of total employment (WTTC, 2020). This is particularly important amid Covid-19 for a country with a chronic unemployment rate of 13 % (TÜİK, 2020). Turkey's total

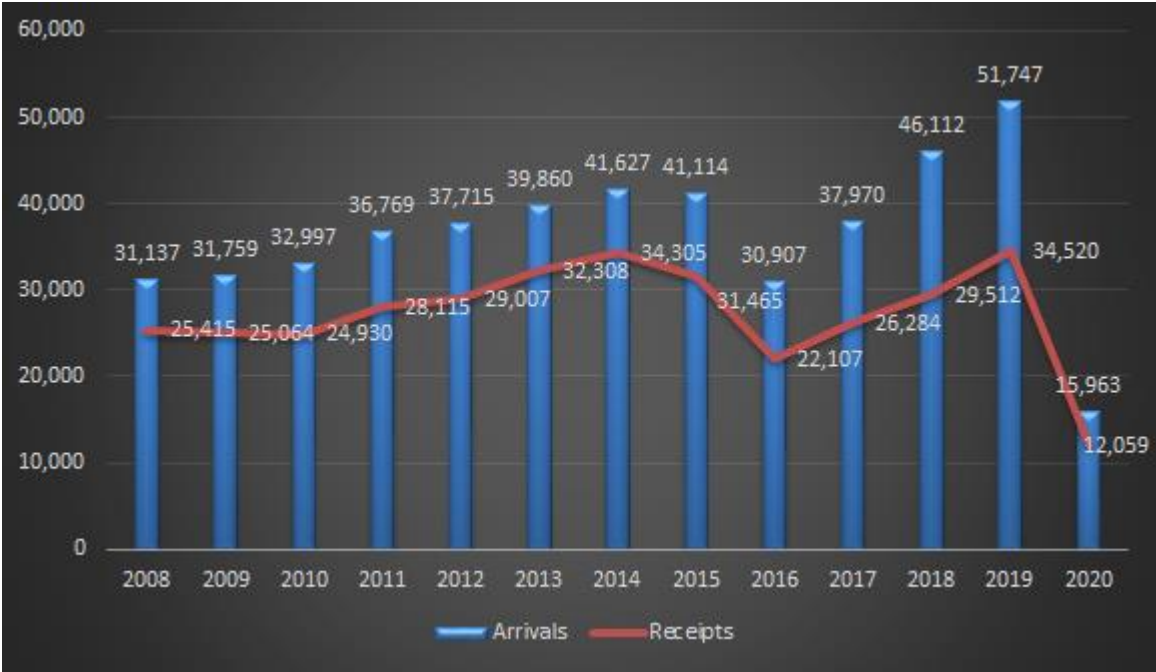
exports in 2019 were 171 billion USD while the trade deficit was 31 billion USD. Total tourism revenue generated in this period was about \$ 35 billion. Tourism contributed to 78% of the deficit while this was 17% for the automotive and textile sectors (TUROFED, 2020). These figures emphasize the central role of tourism in fostering the national economy and thus underscores the importance of enhancing tourism resilience to internal and external crises.

ii. Impacts of Covid-19

The tourism industry in Turkey composes 12% of the gross national product, and 8% of employment (2.5 million people) (COMCEC, 2019). Turkey's tourism industry is more resistant to crises compared with those of many countries and industries. Especially after the 1980s, tourism in Turkey faced terrorism, earthquakes, national and international political events, coup attempt, and economic crisis, but managed to overcome such challenges and become stronger. Considering the tourism income of Turkey, which was approximately 35 billion USD in 2019, the Covid-19 crisis already resulted in a 65% decrease to 12 billion USD (TUIK, 2021). Considering the multiplier tourism creates, this impact will result in twice as much indirect income loss in Turkish GDP. Another problem is Turkey's main tourist generating market, Europe, is one of the regions most affected by the pandemic. Unfortunately, apart from a few city hotels, many tourism businesses, airlines, travel agencies, tourist restaurants, and transporters have been closed with many of them forced to lay off employees. The tourism industry has recently started to open up with increasing demand in summer months and relaxation in lockdowns.

Turkey has been experiencing a rapid development in tourist arrivals. 10 million international arrivals in 2005 reached 40 million in 2014, making the country the sixth largest country considering tourist volume. Despite serious crises within the last five years, Turkey still enjoyed 41 million arrivals in 2014. Turkey reached the highest number of visitors in 2019 at approximately 52 million, which is also the highest in the tourism history of the country. In the same year, the tourism industry generated approximately 35 billion USD of tourism income (TUIK, 2020). Even before Covid-19 infiltrated Turkey, cancellations, especially in the Far East market and Anatolian tours have started. In addition, independent travelers cancelled or postponed holiday plans since the pandemic occurred when early bookings were made.

Figure 16: Turkish Tourism Volume between 2008-2020



Source: MoCT-Turkey (2021)

Figure 16 displays the tourism volume of Turkey since the 2008 financial crises which had little impact in 2009. Turkey has faced various other crises that have affected its tourism industry, terrorist events, political unrest within the Middle East, refugee crises, even an attempted coup, created various setbacks in tourism, yet no previous crises resulted in a 69% decline in tourist volume. The largest destinations in the country; Istanbul (-67%), Antalya (-78%), Mugla (-79%) and Izmir (-75%) all experienced significant decreases. Domestic tourism also saw a 58% decrease in 2020. Despite a major portion of hotels being closed, occupancies still fell by 47% (TURSAB, 2020).

Figure 17: Turkish Tourism Volume amid Covid-19

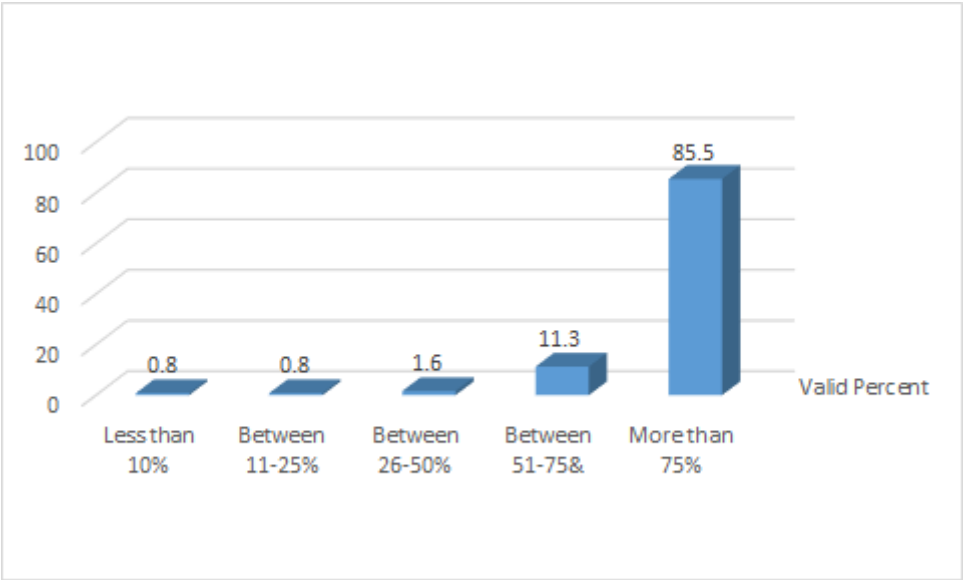


Source: MoCT-Turkey (2021)

As previously mentioned, tourism requires human mobility. Thus, it has been one of the first and most severely affected industries by Covid-19. At the same time, the tourism industry in Turkey can be expected to enter a long-term recovery process after those of other industries because tourism is hedonic in nature and not a compulsory consumption. However, it can regain its old dynamism only after 2021.

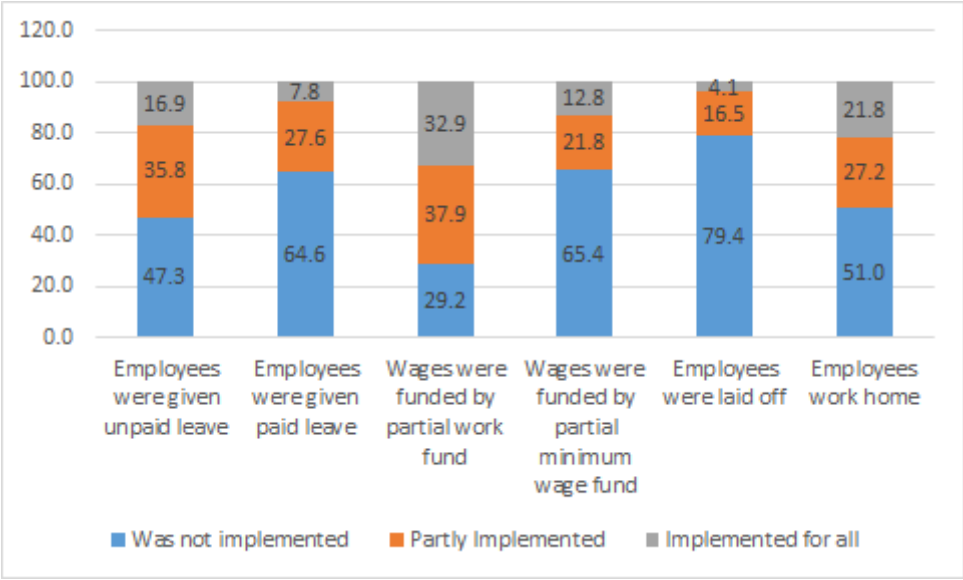
The recovery is expected to progress according to the order of impact. After the domestic market, tourism is predicted to begin recovery starting from Asia-Pacific countries, where the effects of the epidemic are weakened. These are also confirmed by the primary data about the expectations of 246 Turkish tourism experts in March 2021. Based on preliminary findings more than 75% of the stakeholders experienced a 85% decline in revenue as displayed in the figure 17. In Aug. 2021 tourism experts agreed they lost more than 84% of 2019 tourist volume in 2020. The actual loss was around 69% in volume in 2020 compared to 2019.

Figure 18. Tourism Industry Revenue Loss during Covid-19



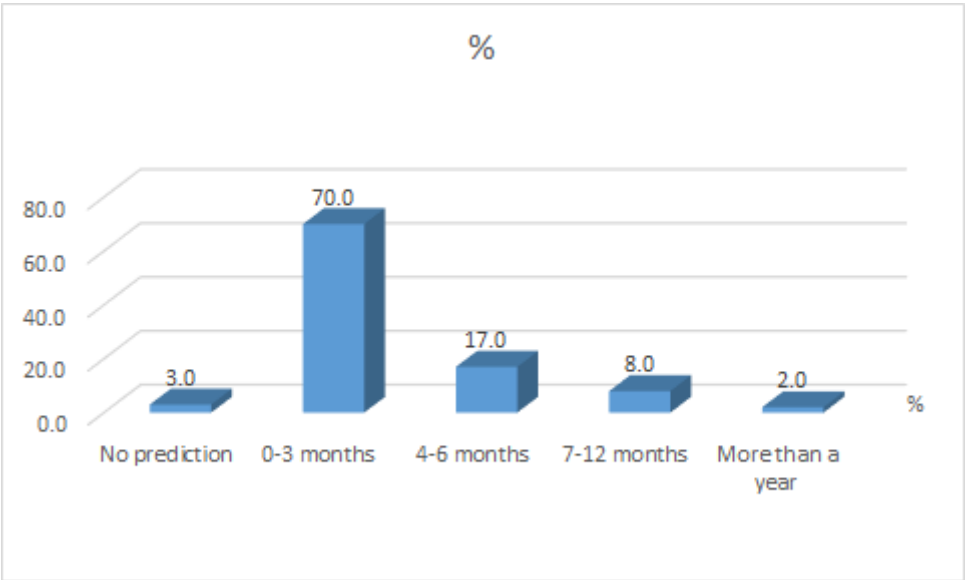
Concerning employment, tourism businesses tried various solutions to protect their employees. Only 4% of the organizations laid off their employees. The government's subventions on wages and fees on employment seems to be the main reason behind this strategy and only 4% of the businesses fully or partially (17%) laid off their staff. 71% of the organizations also utilized the partial work fund offered by the government. Figure 18 also displays 22% of the organizations that have their employees work fully from home. Government has extended partial and minimum wage subventions so far until the end of June 2021.

Figure 19. Employment options used by Tourism Organizations



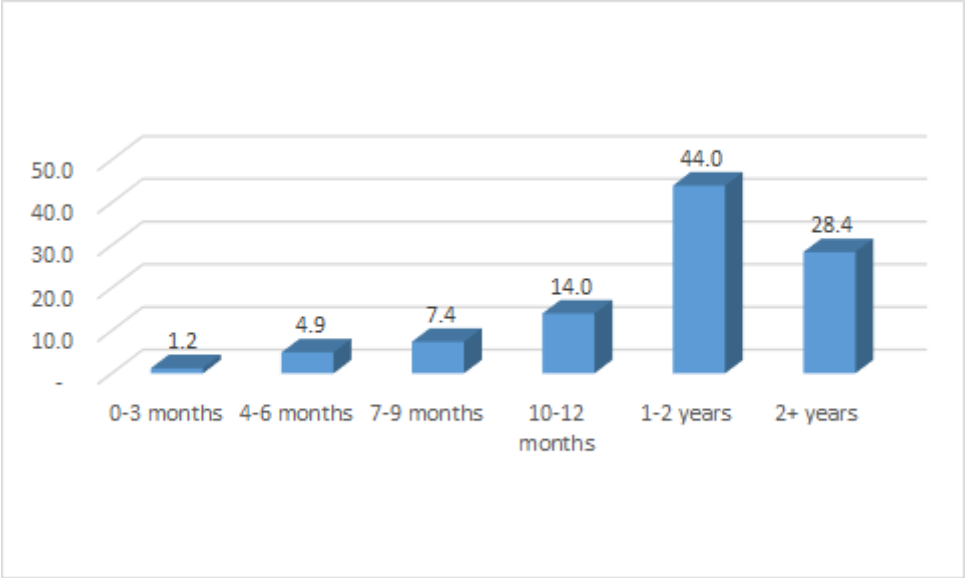
However, struggling with the lock-downs, mobility restrictions and social distancing for more than a year, tourism businesses are hardly surviving anymore. As displayed in figure 18, 70% of the respondents predicted they would go out of business within the next three months if the implications of the pandemic continued with similar strength. Only 2% of respondents forecasted they would still survive if the pandemic extends for another year (Figure 18) during data collection in March 2021. In contrast during August 2021, respondents were more optimistic and they predicted they would survive for 8.1 months on the average without any additional financial support.

Figure 20. Predictions of Future Survival during Covid 19



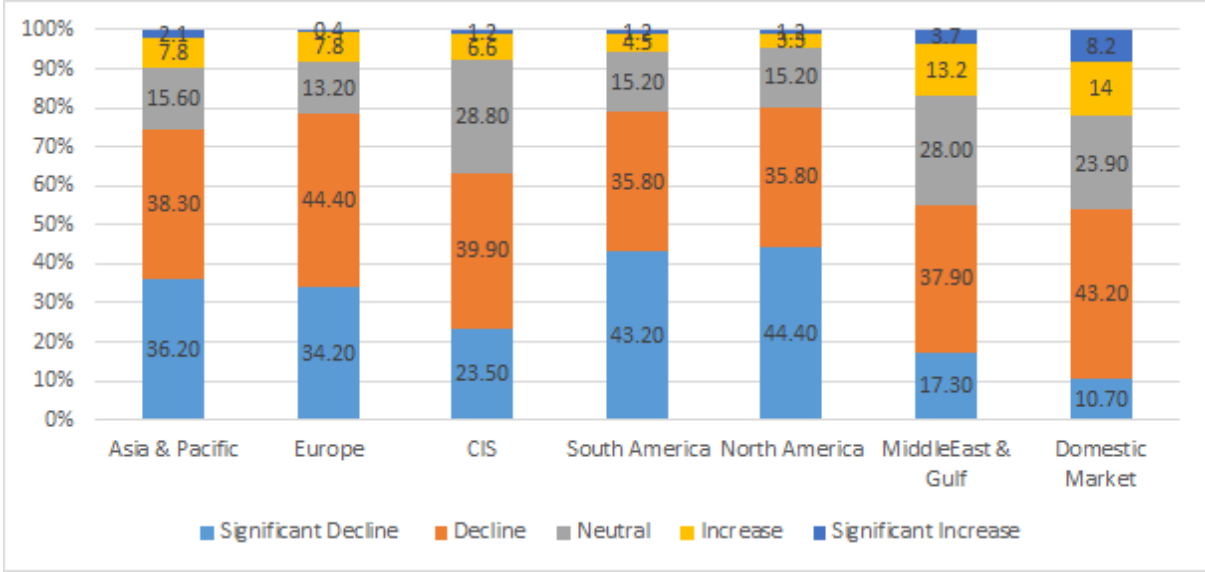
Respondents were also asked about their predictions about when the effects of Covid-19 would be completely removed and they would return to pre-pandemic volume. A major portion (72%) believed it would take more than a year to completely recover from the crises. In contrast, only 1% forecasts a complete recovery within the next quarter.

Figure 21. Predictions about timing of complete recovery



Respondents were also asked about possible transformations in generating regions and tourist motivations. Experts predicted significant declines in the Americas and Europe, whereas Middle East and Gulf as well as CIS countries were identified as more resilient to crises. Domestic market naturally ranked as the strongest market during the pandemic as displayed in figure 22.

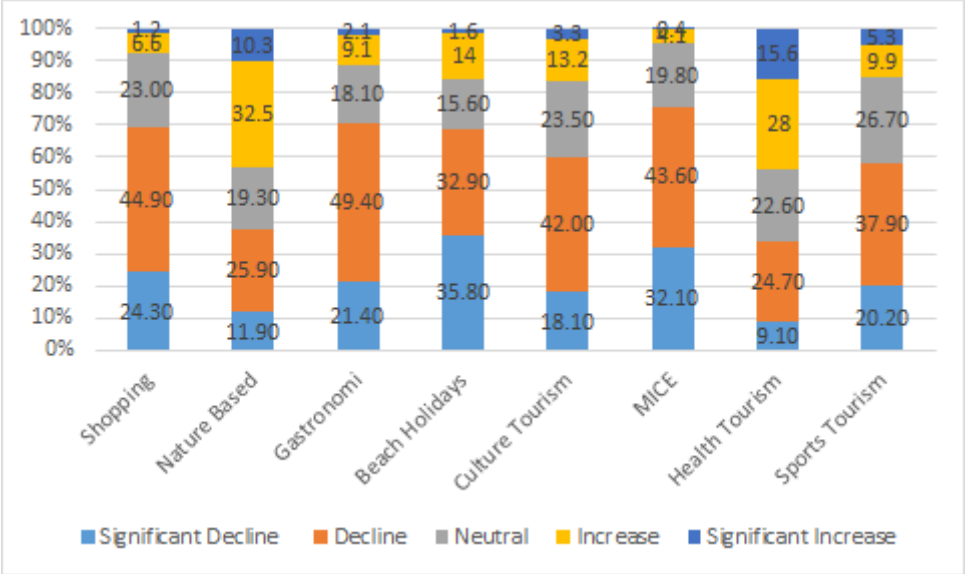
Figure 22. Market Transformations amid Covid-19.



Considering travel motivations, MICE tourism, beach holidays, gastronomy, and shopping were identified to experience significant decline whereas nature-based tourism and

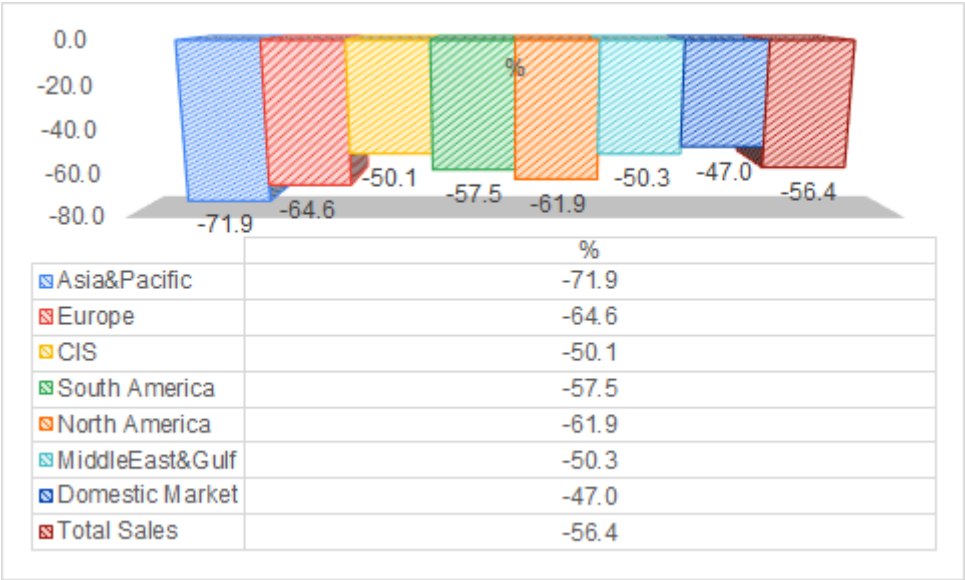
health tourism were predicted to be more popular tourism types amid Covid-19. These are shown below with other travel motivations.

Figure 23. Transformations in Travel Motivations amid Covid-19.



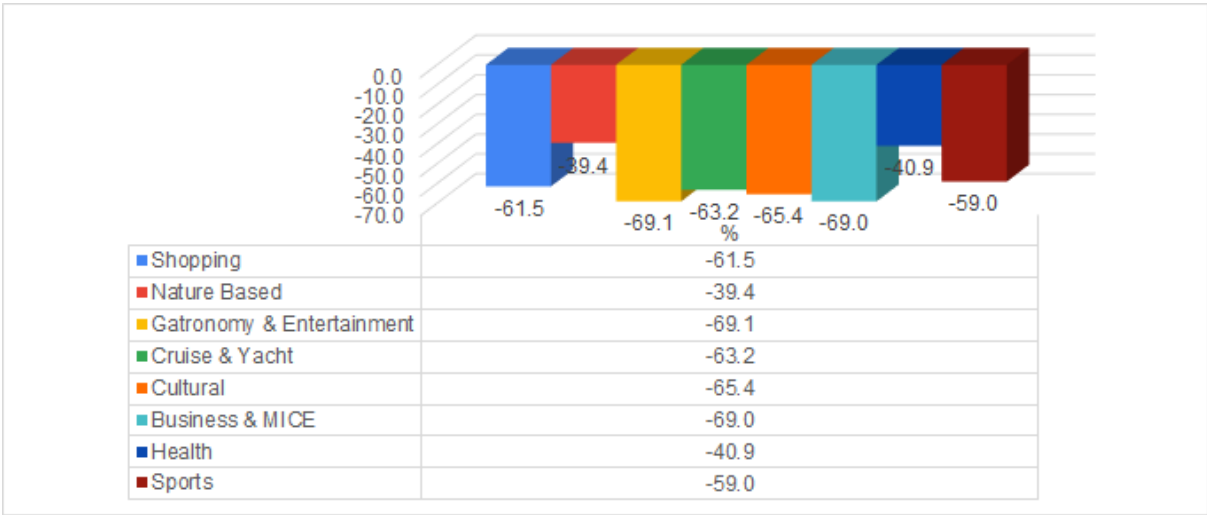
A more detailed survey was also prepared and data was collected from 58 respondents in Turkey (29 travel Agencies, 11 hotels, four restaurants, and 15 others (e.g. events, car rental, guiding services) during Aug. 2021. Based on responses of the final survey completed in August Domestic market (47% decline), CIS (50,1% decline) and Middle East & Gulf (50,3% decline) are identified as the most resilient source markets whereas Asia & Pacific (71,9% decline) and Europe (64,6% decline) as markets with the largest decline. These are also in line with the travel restrictions introduced by these source countries. Asia & Pacific and European markets were pretty strict in closing their borders and quarantine measures for international travelers whereas CIS and Middle East & Gulf countries were kept borders more relaxed for international travelers.

Figure 24. Impact of Covid-19 on Geographic Markets and Total Sales (%) (August, 2021)



Based on the responses in August 2021 concerning the impacts of Covid-19 on tourism types, Gastronomy and Entertainment (-69,1), Business & MICE tourism (-69% decline), and Cultural tourism (-65,4% decline) experienced strongest declines. Whereas decrease in Nature based tourism (-39,4% decline) and Health tourism (-40,9% decline) were more resistant to the crises.

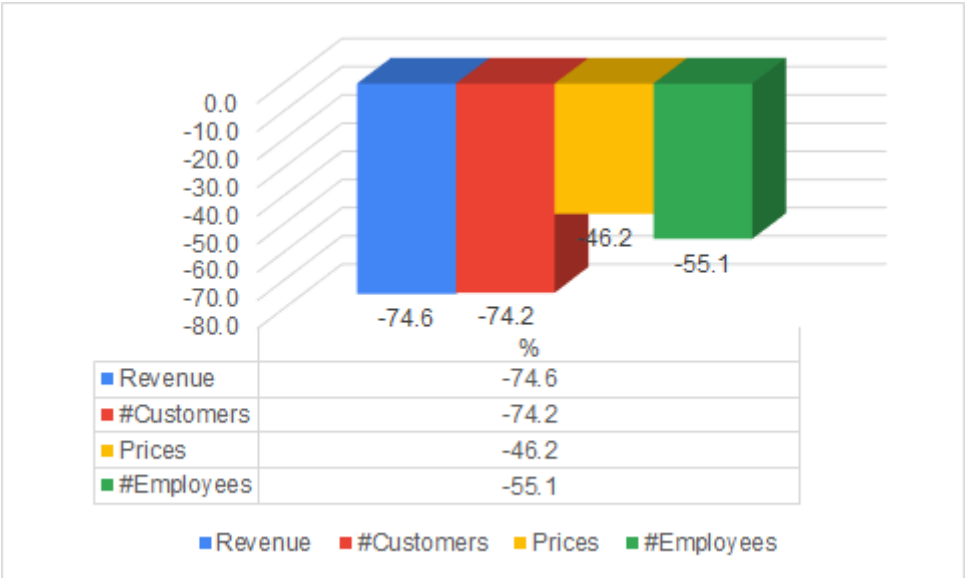
Figure 25. Impact of Covid-19 on Tourism Types (%) (August, 2021)



Regarding the reflection in overall performance indicators, detailed data collected in August, 2021 indicate almost 75% decrease in both revenues and number of customers. Number of employees also decreased by 55% despite government bans on termination until July 2021. This also indicates the informal labor employed in tourism, because the government already

subsidized tourism staff with minimum wage starting from May 2020 during the whole period until July 2021. But these wage support were of course offered to registered employees that were formally employed before May 2021. Prices also stayed strong compared to the decline in volume. Fortunately, understanding price declines might not create additional demand but create customer surplus, price cuts were comparatively lower than decreases in revenue and number of customers.

Figure 26. Impact of Covid-19 on Performance Indicators (%) (August, 2021)



iii. Mitigation of Covid-19

Just like many other countries, the fluctuating nature of the spread of the disease created mixed responses at the beginning but before the third peak in Turkey. The Turkish government has introduced a system describing standard measures based on the level of the spread measured by number of infected per 100.000 residents.

Figure 27. Turkish Spread based Covid-19 Prevention System

	LOW RISK	MEDIUM RISK	HIGH RISK	VERY HIGH RISK
Number of cases per week (per 100k)	(-10)	(11-35)	(36-100)	(+100)
GOING OUT ON THE WEEKEND	ALLOWED	ALLOWED	SUNDAY CURFEW	SUNDAY CURFEW
GOING OUT AT NIGHT	CURFEW FROM 9.00 P.M. TO 5.00 A.M.	CURFEW FROM 9.00 P.M. TO 5.00 A.M.	CURFEW FROM 9.00 P.M. TO 5.00 A.M.	CURFEW FROM 9.00 P.M. TO 5.00 A.M.
AGES +65 AND -20	ALLOWED	ALLOWED	WILL BE EASED	WILL BE EASED
PRE-SCHOOLS	OPEN	OPEN	OPEN	OPEN
ELEMENTARY SCHOOLS	OPEN	OPEN	OPEN	OPEN
GRADES 8 AND 12	OPEN	OPEN	OPEN	OPEN
MIDDLE SCHOOLS	OPEN	OPEN	CLOSED	CLOSED
HIGH SCHOOLS	OPEN	OPEN	IN-PERSON EXAMS	IN-PERSON EXAMS
CAFES/ RESTAURANTS/ BAKERIES/ CONFECTIONERS/ TEA GARDENS	50% CAPACITY 7.00 A.M.-7.00 P.M.	50% CAPACITY 7.00 A.M.-7.00 P.M.	50% CAPACITY 7.00 A.M.-7.00 P.M.	CLOSED
FOOTBALL FIELDS/ SWIMMING POOLS	9.00 A.M.-7.00 P.M	9.00 A.M.-7.00 P.M	CLOSED	CLOSED
PUBLIC INSTITUTIONS	NORMAL	NORMAL	NORMAL	NORMAL
WEDDING HALLS	UP TO 50 PEOPLE 1 HOUR	UP TO 50 PEOPLE 1 HOUR	UP TO 50 PEOPLE 1 HOUR	UP TO 50 PEOPLE 1 HOUR
GENERAL ASSEMBLIES	UP TO 300 PEOPLE	UP TO 300 PEOPLE	UP TO 300 PEOPLE	BANNED

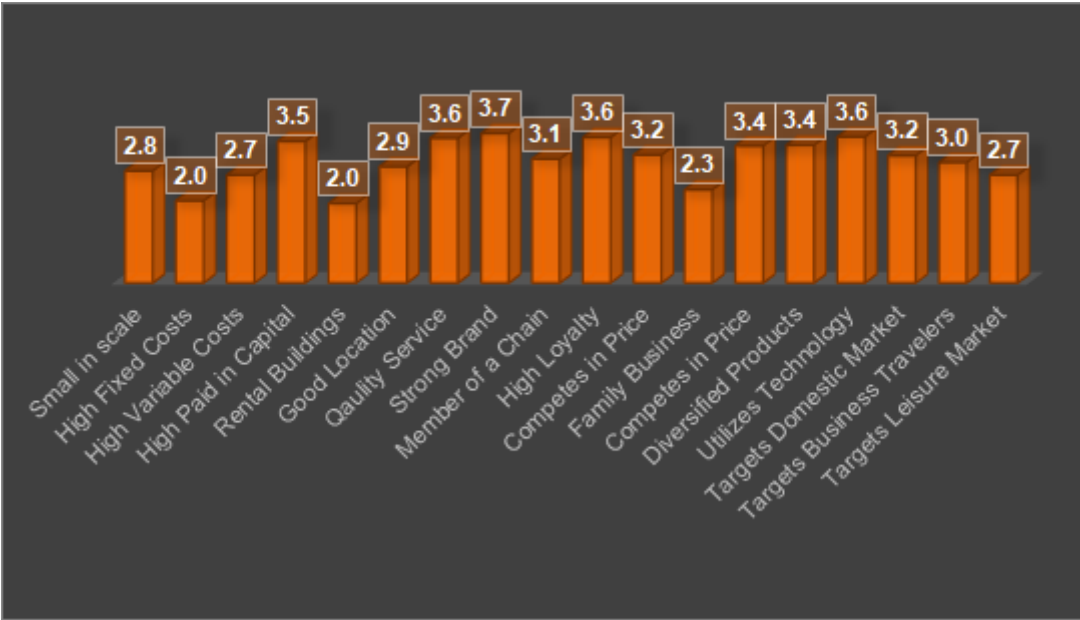
Despite this system does not bring restrictions on accommodation facilities, because of curfew at nights and most weekends and most F&B and entertainment are closed in the red status, meaning that there are more than 100 cases per 100.000 population the tourism industry was affected. Yet, this system has been an efficient way to manage the level of opening up based on risks involved and has been proven successful in various other countries.

1. Industry Strategies

In order to adapt to the crises and the transformations that are brought by it, the private industry adopted some recovery strategies. Based on their feedback, creating a hygiene and safety image will be a priority. Hence cleanliness, social distancing, and capacity limitations will be expected by the market even after Covid-19.

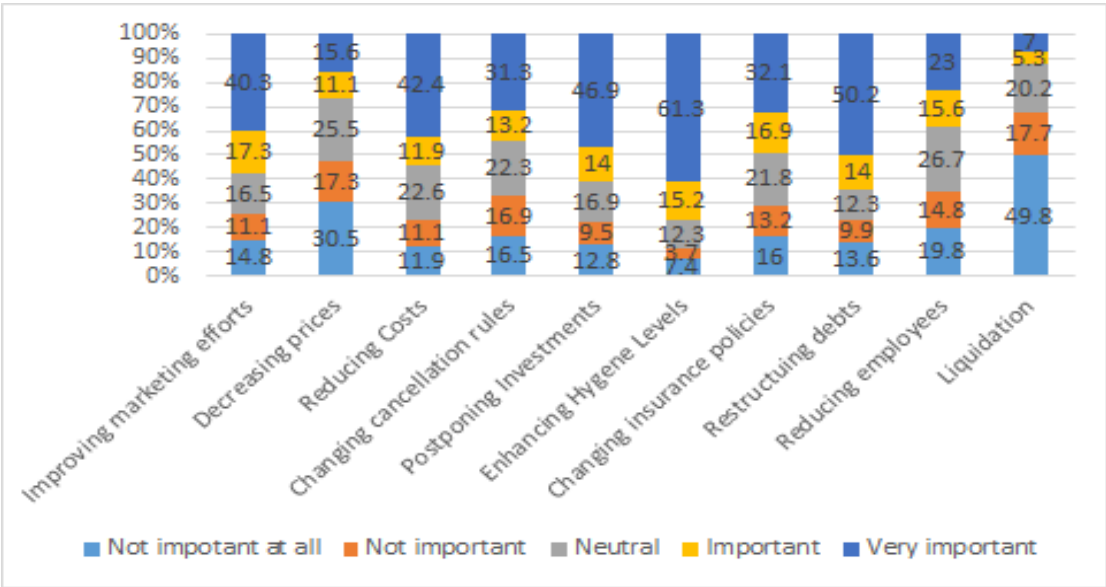
As discussed at the methodology section after the pilot survey a detailed questionnaire was prepared and data was collected from 58 respondents in Turkey (29 travel Agencies, 11 hotels, four restaurants, and 15 others (e.g. events, car rental, guiding services). Industry representatives were first asked the characteristics of Crises Resilient Organizations. Having a strong brand, utilizing technology, offering quality service, high paid in capital and having a large loyal customer base were identified as important features of crisis resilient organizations.

Figure 28. Characteristics of Crises Resilient Organizations (August, 2021)



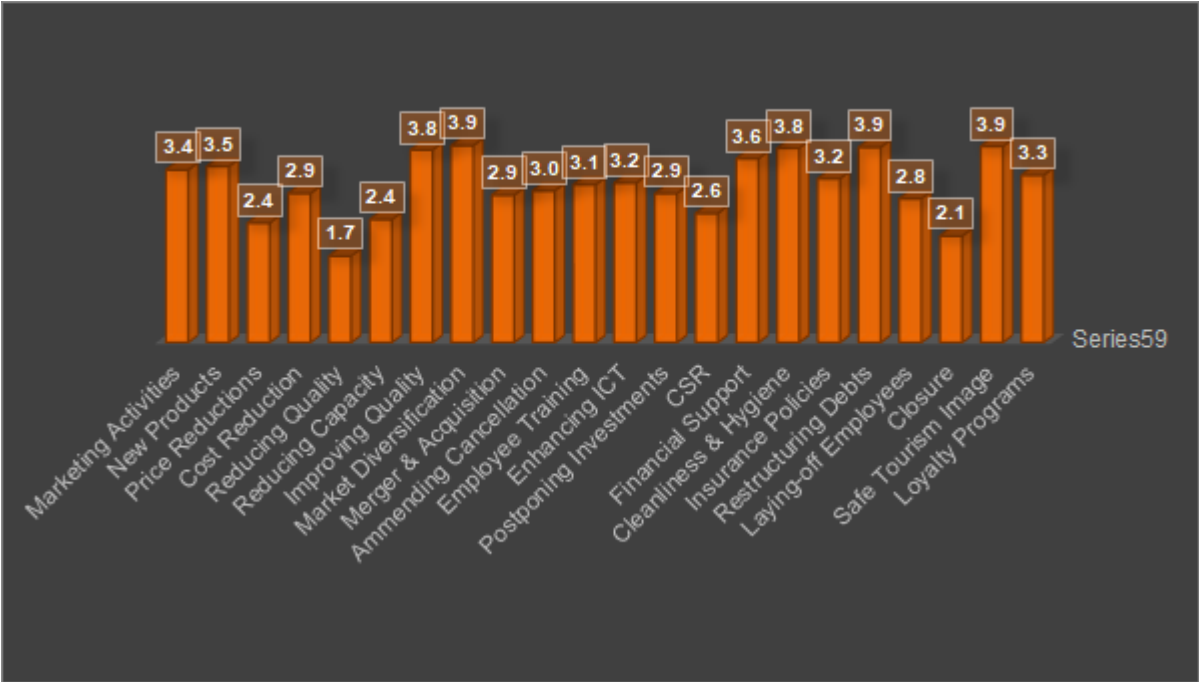
Based on the pilot test during March 2021 Restructuring debts also emerged as an important strategy to survive particularly for tourism businesses that pay rent. Fortunately, the Turkish government offered various credit facilities, bank guarantees, tax holidays and rent postponements. Postponing investments, reducing costs and improving marketing efforts were also mentioned as important strategies. Decreasing prices were perceived as useless during the lockdowns and border closures. Reducing the number of employees and liquidation and going out of business were also mentioned as less popular actions as displayed in figure 29.

Figure 29. Private Sector Covid-19 Mitigation Strategies



Based on data collected in Aug. 2021, Market Diversification (3.9), Creating Safe Tourism Image (3.9), Improving Quality (3.8), Enhancing Cleanliness & Hygiene (3.8), Applying Financial Support (3.6), Introducing New Products and Services (3.5), Enhancing Marketing Activities (3.4) and Enhancing Loyalty Programs (3.3). Decreasing Quality (1.7), Closure & Liquidation (2.1), Price Reductions (2.4), and Reducing Capacity (2.4). Findings are similar to earlier data collected in March. Enhancing marketing communications and service quality, investing on new products and hygiene and applying for financial support were popular strategies utilized by the industry. Particularly cleanliness and hygiene was also described as the new amenity during qualitative interviews. Moreover the safe image created through marketing communications were also mentioned as important.

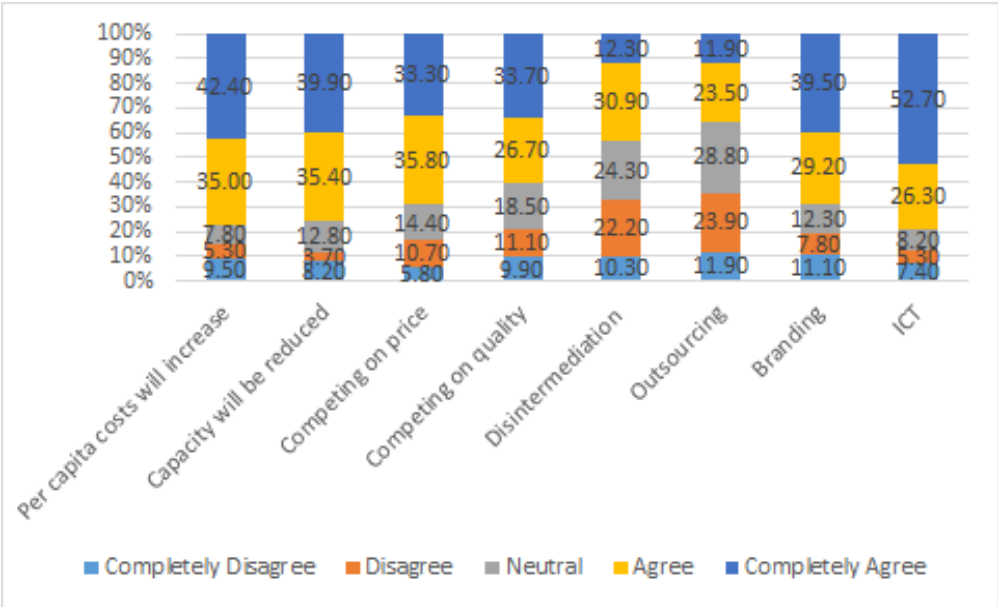
Figure 30. Tourism Industry Covid-19 Mitigation Strategies (August, 2021)



Finally, experts were also asked about the future transformations in the industry. Most respondents agree that ICT will be more important because of the risks associated with human interaction. Because they believe the capacities will be reduced with social distancing they also predicted an increase in per person costs. Because branding is associated with trust, this was also rated as an important item. They also think competing on quality will be more important than price. Finally outsourcing and disintermediation were not perceived as a significant transformation after Covid-19.

Some tour operators also created Vaccine tours to Serbia and Russia. Others included PCR tests into their packages. Some shifted their attention to nature-based tours and health tourism. Some hotels also transformed their facilities to adopt restrictions from restaurants to Cafeterias. Downsizing in general was a popular strategy to keep costs. After a prosperous year in 2019 most organizations were planning to expand but because of the Pandemic they postponed their investments.

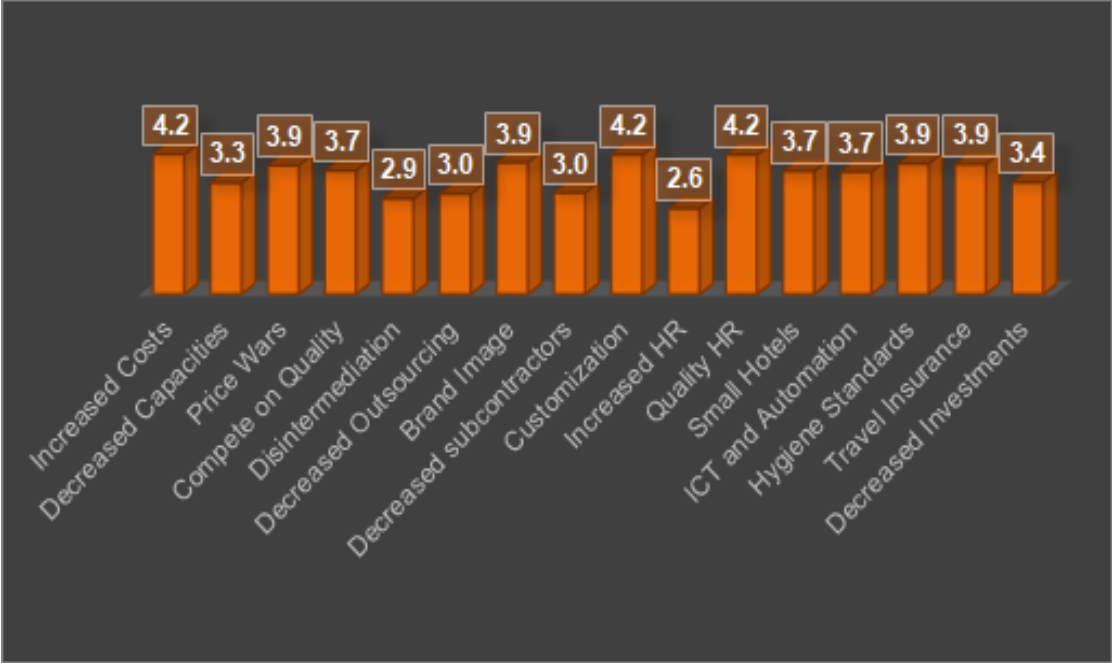
Figure 31. Transformations in the Tourism System (March, 2021)



Industry experts were again inquired about the transformations in the tourism system during Aug. 2021. Increased Costs (4.2), Customization (4.2) and Quality HR (4.2) were mentioned as the most important transformations. Because of capacity limitations tourism will lose some of its economies of scale and per person costs will increase. Tourists will also look for more isolated and customized holidays rather than the standard mass package products. Quality HR will also be harder to attract and retain because Covid-19 also affected tourism as a reliable career path. Most quality HR already left the industry for other businesses and potential HR also changed their perceptions about the future of tourism as a profession. Decreasing prices, brand image, new hygiene standards and enhanced travel insurances were also seen as a part of the transformation. Considering decreasing prices, coupled with increased costs, tourism industries’ potential to generate revenues has obviously declined. Social distance and hygiene standards also increase costs. For example hotels now have to use disposable kits,

water analysis, isolation rooms, employee checks and additional disinfection material as per safe tourism certification, and they also need to pay for monthly audits, and the government needs to cover these expenses as well.

Figure 32. Transformations in Tourism after Covid-19 (August, 2021)



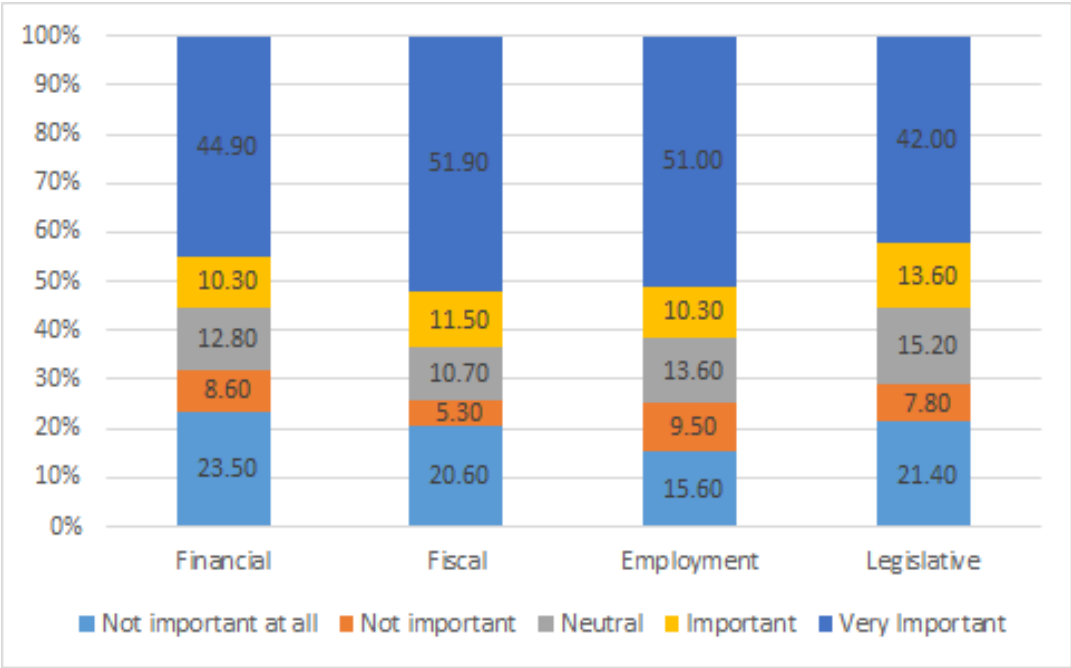
2. Government Strategies

The government used a wide range of interventions ranging from tax holidays, financial incentives, fiscal measures, credit facilities to promotional and employment support to help industry survive various crises including Covid-19. Currently, several short-term measures under the leadership of MoCT (Ministry of Culture and Tourism) have been undertaken to keep industry stakeholders afloat similar to the initiatives taken in many other countries. These schemes include fiscal (e.g., postponement or discount on taxes, fees, dues, entrance fees, and rentals), financial (e.g., low-cost loans and public guarantees), legal (e.g., transfer of agency documents and postponements in cancellation refunds), documentation (e.g., safe tourism certification and auditing), and labor protection (e.g., allowance for short-time work and minimum wage support), marketing (e.g. safe image) and domestic tourism (e.g. VAT cuts in domestic flights) measures.

Fiscal incentives include suspended and postponed social security contributions, tourism tax and rental fees, including the tourism industry. VAT on domestic airline fees were also reduced from 18% to 1%. Financial measures included waiving travel agency quotas, cancelled flights to be used within one year after removal of flight restrictions without any immediate reimbursement, postponing credit payments, and credit guarantees with low interest (WTTC, 2021).

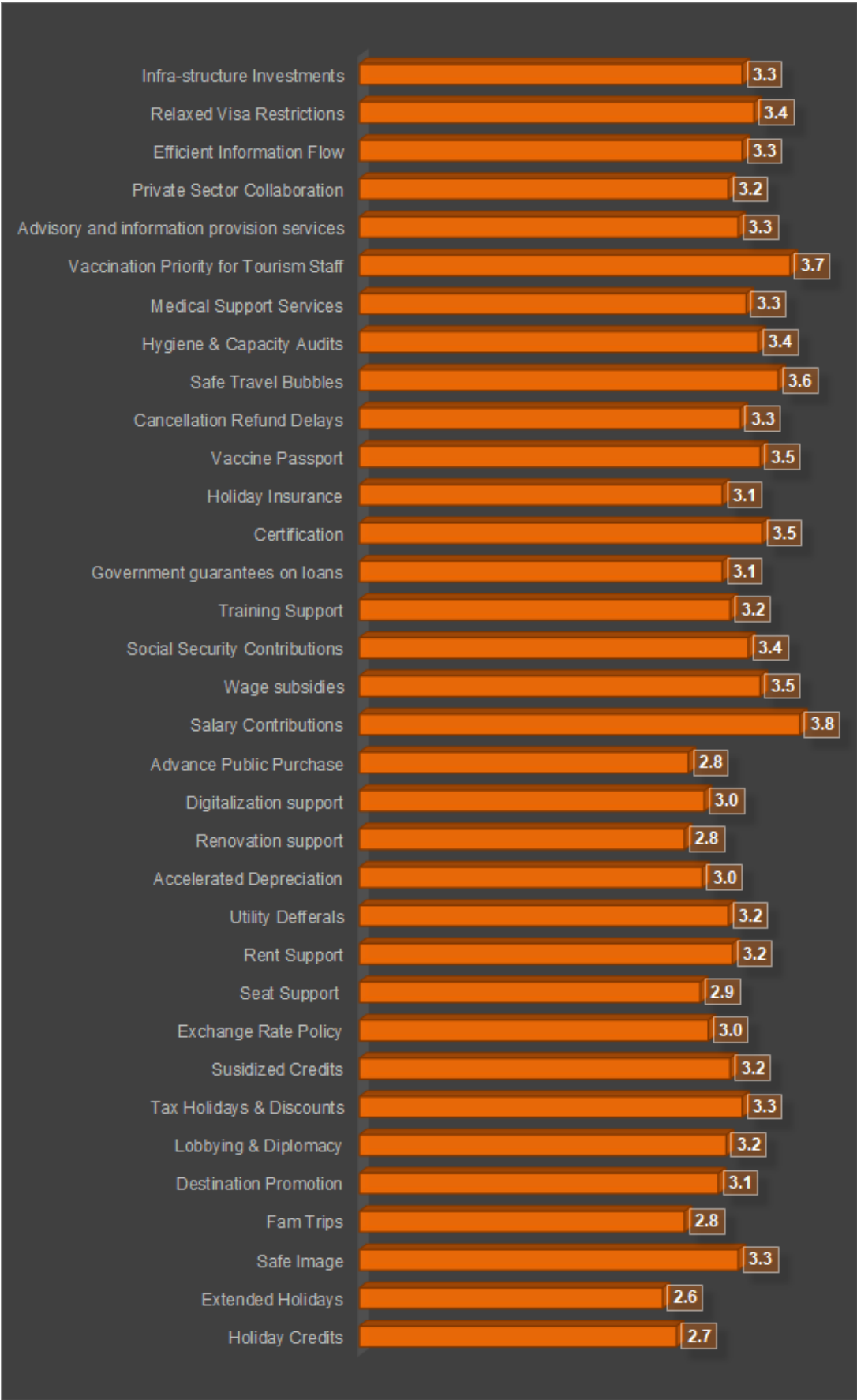
Based on responses from 246 tourism experts during the pilot stage, fiscal measures and employment related subsidies from the government are the most important recovery measures. Legislative actions and financial support were also mentioned as important. These are displayed in figure 33.

Figure 33. Importance of Government Recovery Actions



More detailed data was collected during Aug., 2021 about the government strategies. A total of 29 distinct strategies were identified based on literature review and in-depth interviews with tourism experts. The importance of 29 strategies were rated then by industry representatives based on a five point Likert scale. The findings are displayed in figure 34.

Figure 34. Importance of Government Measures (August, 2021)

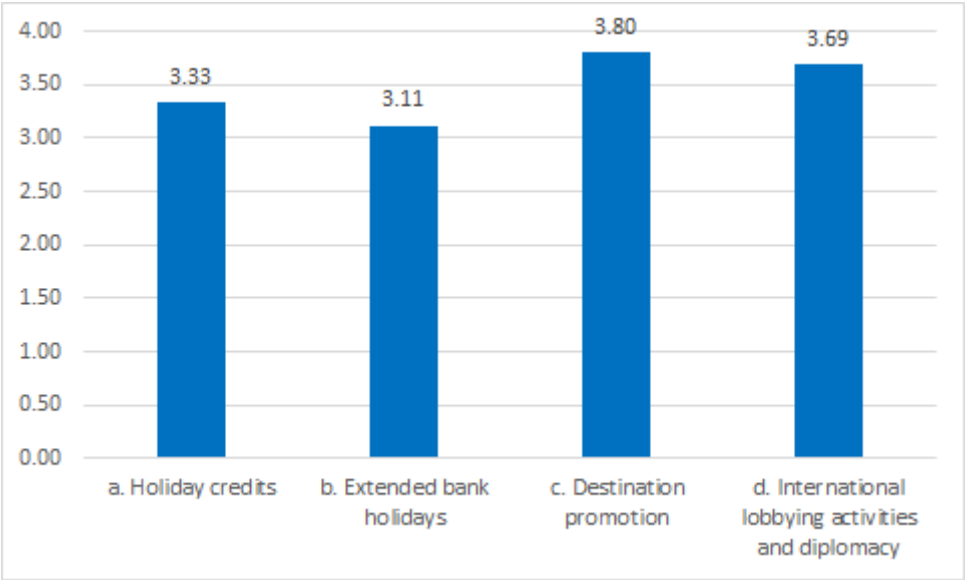


The most important government measures rated by the industry representatives were Salary Contributions for Employees (3.8), Vaccination Priority for Tourism Staff (3.7), Creating Safe Travel Bubbles (3.6), Safe Tourism Certification (3.5), Introduction of Vaccine Passports (3.5), Wage Subsidies (3.5), Hygiene and Capacity Audits (3.4), Relaxed Visa Restrictions (3.4) and Social Security Contributions (3.4). Different from the initial study, Financial Measures were comparatively rated as less important. However subsidies targeted for employees (salary contributions, wage subsidies, social security contributions), operational measures (safe tourism bubbles, safe tourism certification and audits) and legislative measures (vaccination priority, relaxed visa restrictions) were rated as important.

The least important items were rated as Extended Bank Holidays (2.6), Holiday Credits and Vouchers particularly for domestic tourism (2.7), FAM Trips for Tour Operators and Press (2.8), Renovation Support (2.8), Advance Public Purchase (2.8), and Seat Support (2.9). Most of these items include financial incentives to stimulate direct or induced demand. Yet, because the reason for low demand is not financial, the industry executives rated these stimulators as less important. This also proves the industry believes in a boom after travel restrictions are lifted.

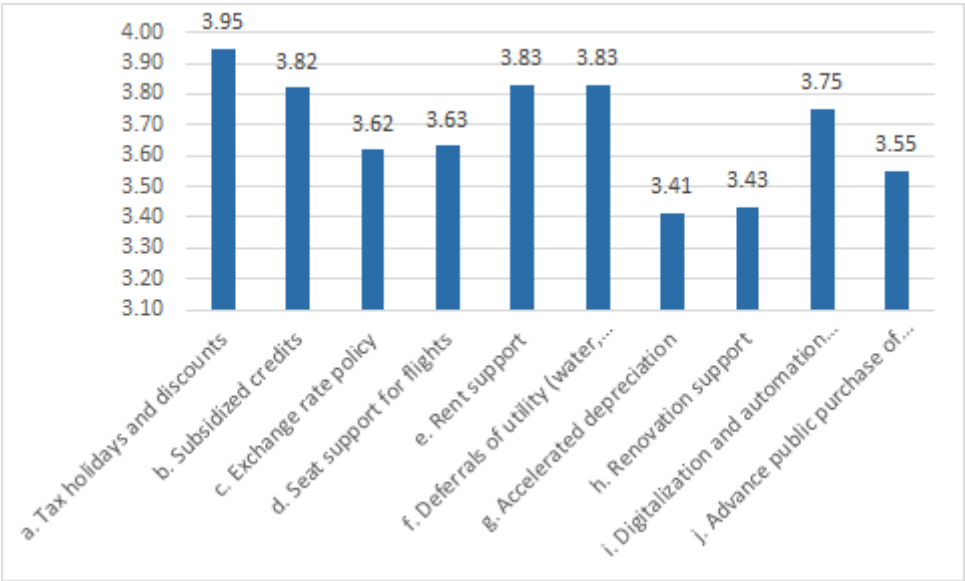
Government measures were also grouped under five factors as strategies introduced for Stimulating demand, Financial support, Workforce training and development, Legislative actions and Operational support. Strategies aiming to stimulate demand included such items as Destination promotion (3.80), International lobbying and diplomacy (3.69), Holiday credits and vouchers (3.33) and Extended bank holidays (3.11).

Figure 35. Strategies to Enhance Demand.



Financial support measures are also designed to help tourism organizations cash flow during Covid-19. Financial support included Tax holidays, deferrals and discounts (3.95), Utilities Support (3.83), Rent Support (3.83), Subsidized credits (3.82), Digitalization and automation support (3.75), Seat support (3.63), Exchange rate policy (3.62) and so on as exhibited in figure 36 below.

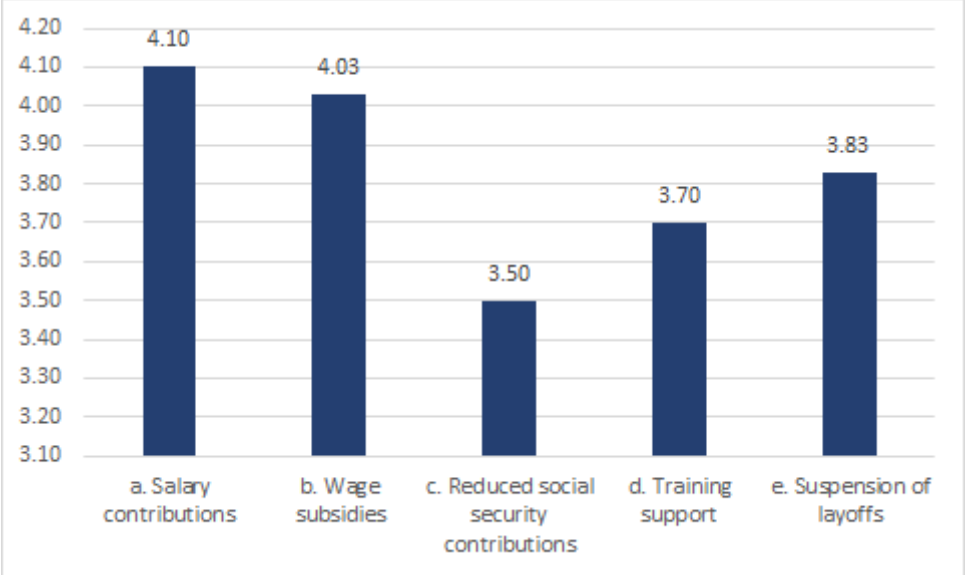
Figure 36. Financial Support



30% of Turkey’s accommodation is on public lands for which owners/operators pay an annual lease/rent. These rents have been postponed. VAT on domestic flights was cut from 18% to 1%. Credit facilities were improved with lower interest rates and government

guarantees were offered to support cash flow. Accommodation tax was also postponed until further notice. Discounts on utilities, energy and water were also designed. The government also offered minimum wage and part-time employment support for tourism industry wages. Discounts provided for travel agencies on entrance fees were also increased to 30% from 20%.

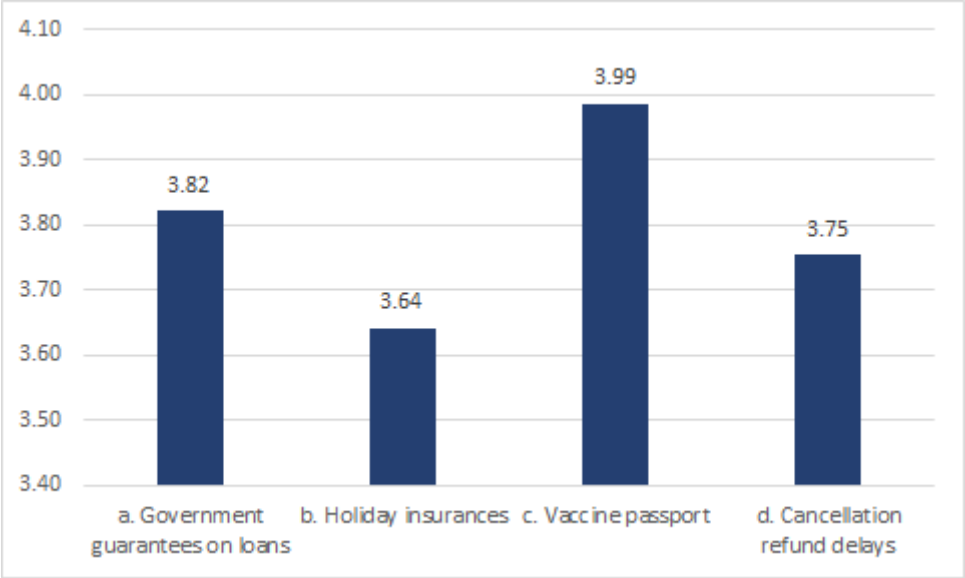
Figure 37. Workforce Support and Development



As a human intensive service tourism employs a great number of employees. Thus human resources are both important for the quality of the service provided and a major cost center. Salary contributions (4.10), Wage subsidies (4.03), Suspension of layoffs (3.83), Training support for human resources (3.70) and Reduced social security contributions were listed as government support measures targeting at maintaining and training workforce in tourism as displayed above.

Various legislative actions were also designed to help the tourism industry survive the crises. Legislation about vaccine passports (3.99) standardized international regulations and facilitated travel. Government guarantees on loans (3.82) made bank credits more accessible for the tourism industry. Cancellation refund delays (3.75) helped tourism organizations postpone their force-major cancellation refunds to their clients while holiday insurances (3.64) provided some assurance for travelers.

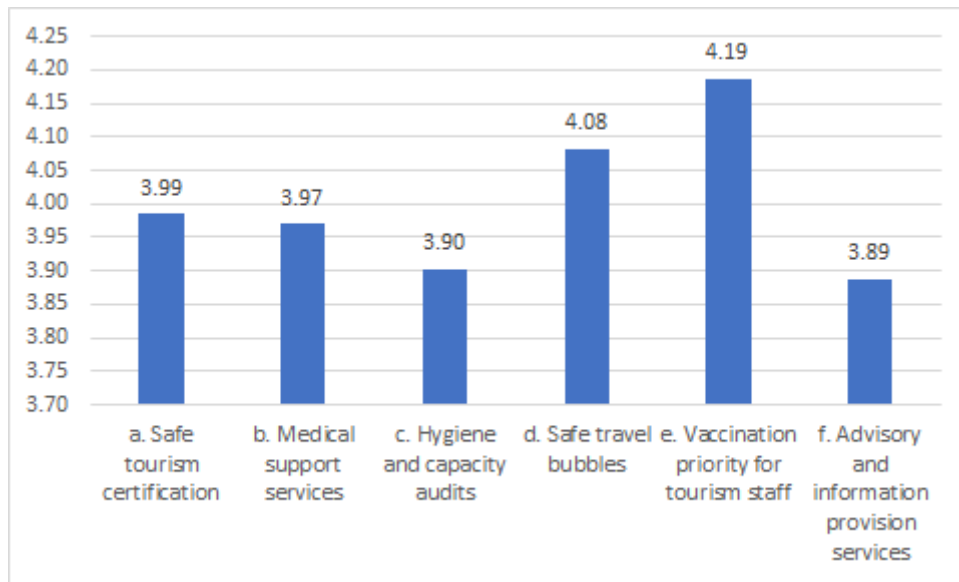
Figure 38. Legislative Actions



The Turkish government has also introduced safe tourism certification created by MoCT (Ministry of Culture and Tourism), MoIA (Ministry of Internal Affairs), MoH (Ministry of Health) setting up various standards for different tourism services. All hotels with more than 30 rooms were supposed to have the certificate to operate. As of November 2020, a total of 1975 hotels operate under safe tourism certificates (TURSAB, 2020). By May 2021 the number of hotels with safe tourism certification has increased to 2383. One major problem with this certificate is that even if receiving the certificate is free, the hotels have to pay for monthly audits, creating some discomfort among hotel executives.

Hence these operational interventions were also rated by the tourism industry members. As figure 39 below exhibits, Vaccination priority for tourism staff (4.19), Safe travel bubbles (4.08) isolating tourism activity to minimize risk of spread, Safe tourism certification (3.99), Medical support services (3.97) provided by the government, Hygiene and capacity audits (3.90), and Information provision and advisory services (3.89) for both tourists and the tourism industry were all listed as important government operational measures.

Figure 39. Operational Measures



Stakeholders also mentioned the hygiene standards outside of their facilities and the image of the destinations as clean safe destinations should be developed and communicated. Turkey also designated tourism workers as one of the priority groups and already completed their vaccination in April, 2021 and used this as a PR tool in promotional campaigns. Some participants mentioned international events such as the Champions League final as an opportunity to showcase Hygiene and safety.

Another major issue is that although termination is banned unless resignation, most tourism organizations lost 75% of their staff. Given this very high voluntary resignation rate, we can anticipate growth in the informal labor in the tourism industry. This was particularly the case in restaurants.

Turkey spared 2.5% of its GDP to Covid-19 fiscal measures, recovery and subventions. This puts Turkey in the 68th position in the world among 168 countries. However the share of these fiscal measures is 20% of the GDP in Japan, 12% in the USA and 11% in Germany (Elgin and Basbug, 2020).

Particularly during the qualitative study, marketing, image building and restoring the destination brand focused on safety and hygiene, were stressed as important. Yet this can not only be achieved through constant advertising but also instilling confidence and trust that authorities meant for what they said. Public relations messages should provide instructions and

credible information about the crisis, the volume, and prevention measures in an informative, transparent and prompt way.

Public relations activities should also target residents, as tourists also become a source of the threat during an epidemic and the community questions the causes of crises, tourists as the sources of spread and the credibility of response strategies. There have been some debates in Turkey about keeping borders open during lockdowns and possible consequences.

iv. Policy Recommendations

Despite Turkish tourism, facing continuous crises in the past, has proven its survival skills, Covid-19 has unprecedented global implications. And the pandemic is also affecting tourism in Turkey. Previous crises, including epidemics, had limited and regional impacts on the industry, however, with globalization and growth of international tourism, these events, particularly epidemics, also tend to affect a broader area rather than the specific region that the crises originated. The tourism industry and policy makers also expressed a need for a more coordinated and multi-faceted approach to risk and crises management, particularly in the case of epidemics.

Crises and risk management strategies should also be prepared based on different scenarios. Based on these action plans, various risks and preventative measures should also be communicated with the stakeholders. Risk communications are created based on the results of risk analysis, and the credibility of these messages is important. Hence an open communication with full access to correct data is needed. Artificial intelligence is also being used to identify possible scenarios and predict risks and impacts. The accuracy of these predictions however is very much dependent on the quality of big data collected and analyzed. The strategies should also match with the characteristics, markets, products, needs, background, experience and values of the stakeholders at the destination.

Considering tourism as a whole, domestic tourism is expected to recover before outbound tourism. Flights will start gradually from domestic lines and partially from safe countries. Recovery in the outbound market is expected to follow the spread of the epidemic. Air traffic is already opened beginning with the Far East, Russia, Europe, and America after June 2020. Our data confirmed besides the domestic tourism, CIS market, Middle East and Gulf regions are predicted to be growing more than the traditional markets in Europe and Americas.

Targeting strategies after the crisis should also be reviewed. In particular, people with fixed income compared with others (e.g., public servants and retirees) will demand a vacation as soon as a safe environment is provided. Especially retirees with plenty of time who no longer have school children are expected to contribute to the revival of senior tourism. Therefore, adapting products and services to meet the needs of this market segment is important. The fact that this segment is in the risk group requires that extended services, such as health, hygiene, and disinfection, should be arranged accordingly.

Based on a report conducted by TURSAB (2020), price as a primary factor for holiday choice was replaced with hygiene and safety concerns. Silver hair tourists (55+) cancelled 1,5 times more trips than average. After Covid-19, the use of personal transportation and vehicles had increased by 48%. Apart from this aspect, new arrangements for travel (e.g., only Covid-19 immune-proven individuals, vaccine passports, students under 25, passengers who will agree to 14-day follow-up or quarantine procedures during arrival) are also among options. Various countries (e.g. the UK and Spain) have already announced a 14-day quarantine period for international arrivals.

Apart from the short-term measures, the crisis can be taken as an opportunity to establish permanent structural changes in Turkish tourism. For years, Turkey has received a well below the global average per capita income from tourism, which is approximately 600–850 USD, due to excess supply. Despite there being a severe decrease in volume and receipts, the per capita income has increased from 666 USD to 762 USD amid Covid-19.

Low per tourist spending is a major problem in Turkish tourism, like many OIC countries (OIC average was also around 800 USD in 2019). This period can be used as an opportunity to achieve quality targets instead of quantity, to reorganize the balance between supply and demand, and to increase per capita tourist spending to more than 1000 USD of the world average. For example, despite Turkey ranking as the 6th destination considering the number of arrivals, it is only the 14th in terms of tourist receipts. Hence the Covid-19 period can be seen as an opportunity to increase per capita tourist spending, by investing in quality, brand image and balancing demand and supply at optimum price levels. The industry experts also acknowledged that price cuts were not a viable strategy for recovery. Marketing initiatives, particularly enhancing the hygiene image were mentioned as important recovery actions. Reducing operational costs and restructuring debts were also mentioned as significant options.

After Covid-19, various services, such as mass and all-inclusive tourism, which are systems designed to provide services to a large number of tourists simultaneously, will be replaced by personal, high value-added products and services. Our finding also suggested Health tourism and nature-based tourism as growing markets therefore both market and product diversification policies should be directed towards these types of tourism motivations. MICE tourism, shopping tourism, gastronomy and beach holidays were, on the other hand, expected to experience a serious decline.

Other structural problems in Turkey include the absence of regional destination management organizations. Moreover, existing destination management organizations are inadequate in terms of resources and efficiency. A holistic response among destinations to the crisis is only possible with collaboration to identify risks and manage crises effectively. In this context, an independent, accountable and collaborative structure that brings the private sector and local governments together should be established to manage risk and crises.

In the long term, practices that may create risks of Covid-19, especially collective activities (e.g., open-buffet meals) will be avoided; the use of robots and automation systems will increase; the importance of individual applications (e.g., room service) and information communication technologies will increase; hygiene standards will change and structural alterations may be observed regarding equipment (e.g., disposable trays), their raw materials (e.g., copper instead of steel), and design of rooms (e.g., basic kitchen facilities). Accommodation and food and beverage businesses should be able to develop similar strategies in the long term and adapt to the sensitivities that will occur in the market after the Covid-19 outbreak.

Special-interest tourism, which is organized in small groups, will increase significance for tour operators. Transportation processes and vehicle designs will also change. In other words, as the capacity per vehicle will decrease, the prices will increase due to increases in cost per person. Industry representatives also believe that sharing economy-based business models (e.g., Airbnb) that compete with the traditional tourism industry will lose power due to related concerns, such as security and cleanliness.

Conversely, online transactions will increase, and the trend of disintermediation (e.g. the disappearance of brick and mortar agents) will continue at an accelerated pace, such that mergers and acquisitions will be observed more frequently in the market. The significance of

ICT was also mentioned by Turkish tourism experts. An increase in per capita prices, reduced capacity and the importance of branding were mentioned as transformations awaiting the industry. Competition based on quality rather than competing on price was also perceived as more viable.

One major challenge with Turkish tourism is the informal economy which makes 23% of employment and 27% of GDP. These sectors and workers have largely been overlooked because they are informal (Elgin and Başbug, 2020). One of the important stakeholders that are often overlooked in the tourism industry is licensed tourist guides considering the organization and operation process of the package groups. Approximately 20,000 guides are registered in Turkey for whom the season was closed even before it opened and who were severely affected by the dynamics in the market. Similar transformations await the agencies, and larger groups will be replaced by more small boutique groups and private tours. In this manner, guide–driver options to bring the costs down can be listed among the trends that may be more popular for small groups of tourists.

During the recovery, which is expected to last approximately two years, public planning and industry should collaborate for restructuring and transformation awaiting the tourism market, and destination image (i.e., safety, health, and hygiene) should be planned based on the concerns of tourists. Marketing campaigns that will be put into action after the Covid-19 pandemic should be prepared for markets that are likely to recover initially with different scenarios after the crisis. In this manner, social tourism activities, especially the promotion of domestic tourism, can be encouraged.

The recovery scheme should also include to provide support for the training and development of idle human resources, facilitate postponement of reservations instead of cancellations, prevent discriminatory policies, establish crisis and risk management systems and keep them continuously active, and strengthen the capital structures of businesses, and make them resistant to the medium-term effects of Covid-19 and crises to come. These goals can be listed as objectives to be achieved during the transformation process.

Alternative forms of domestic and individual tourism will be preferred by tourists rather than all-inclusive hotels. Although the developments will vary depending on the duration of the effect of the pandemic, one thing is for certain: the pandemic will continue to affect the tourism

industry. However, every crisis can be transformed into an opportunity to implement effective measures to create a more resistant, stronger, and competitive industry.

The travel demand will switch to more safe destinations and tour operators will concentrate on countries with stable and trusted measures against Covid-19. Sudden changes in travel restrictions affect tour operators immensely. Therefore a consistent, transparent and professional management is needed. Another policy recommendation is crisis communication and creating a safe destination image, particularly through formal PR activities and using social media.

The credibility of these messages are naturally parallel to their consistency and alignment with government responses. Whatever the crisis, the optimal response is to provide timely information that is accurate, credible, objective and transparent enabling stakeholders to act on it and prospective visitors to make informed decisions and modify their travel arrangements to ensure their safety (COMCEC, 2017).

In order to speed up the recovery, the government might also introduce some incentives for tour operators initially. Such subsidies included ‘flight support’ for group A certified travel agencies (i.e. US\$6,000 subsidy for a plane bringing 100 foreign tourists – i.e. \$60 subsidy per capita) in the past. Initially, this subsidy was applied in previous crises to charter flights at certain airports but it can now be reviewed to apply to a wider range of airports and scheduled flights, and cruise lines.

Turkey has comparatively managed the crisis well, keeping the death/infection ratio around 2%. Considering the number of vaccinations Turkey also ranked 7th in the World in May 2021. Turkey also ceased all international flights starting from March 2019 and gradually reopened based on the regional spread of the virus. The country also identified tourism staff as one of the priority groups and finished vaccinating the majority of tourism contact personnel within its safe tourism program. Citizens above the age of 60 are already vaccinated but as aforementioned the recovery depends on its generating regions success.

Turkey's markets Russia, and Germany are doing fairly well in vaccination. The third largest market the UK also has undertaken serious steps to vaccinate Brits and expected to reach herd immunity soon. Finally the government offered various subsidies in terms of financial, fiscal, employment and legislative tools. Although these are all utilized by the industry, particularly the employment related measures (e.g., labor protection allowance for short-time

work and minimum wage support), and fiscal measures (e.g., postponement or discount on taxes, fees, dues, entrance fees, and rentals) were identified as most important for survival.

Feedback from industry representatives was also very optimistic about the post-Covid volume, and as soon as herd immunity is achieved they expect record demand in tourism. The exchange rate increase within the last two years also created a better value for money which is also perceived as an opportunity by most tourism professionals. The first six months performance in 2021 was 7,5 million arrivals and 5.5 billion USD receipts. Although Turkey expects 20 billion USD tourism receipts until the end of the year, predictions based on first 6 months indicate 16.8 million arrivals and 13.3 billion USD income from tourism in 2021 (Kofteoglu, 2021).

Creating a portfolio of products and customers was also mentioned as one of the factors to minimize risk for different scales of crises with different origins and impacts. Flexibility to stay small, with minimum fixed costs and encouraging outsourcing and cross training of employees were also discussed as solutions for a more resilient tourism system.

Some stakeholders also perceive various opportunities. All-Inclusive and mass tourism is expected to suffer more and the bad apples will be removed from the system. The government should also be able to identify these and quit supporting these businesses that reported loss to avoid taxation during each term. The government should protect and help flourish the registered professional organizations and let go of the rest by positive discrimination rather than wasting important finances.

Boutique hotels are also perceived as more agile and hygienic from the volume perspective. Brand image and trust that comes with the brand is also discussed as a competitive advantage. Chain hotels also make informed central decisions and create professional standards and train their employees. It is harder for independent hotels to reach those standards established based on international expertise and research. But again most chain hotels are large and there will be people avoiding crowds and prefer boutique hotels. Hygiene has become so important that “cleaning is perceived as the new amenity” in hotels. Independent facilities with kitchens were also mentioned by some tour operators as the trending lodging alternative. Capital structure and capital reserves were also listed as critical in case of crises. Some markets (ie. Russian and Eastern European markets) were also perceived as more resilient than other markets.

Government efforts were also perceived as satisfactory. In summary, Covid-19 is not the first crisis faced by the tourism industry. In particular, tourism in Turkey has succeeded to survive consecutive crises in the past few years where stakeholders have experienced similar downturns. Covid-19, although a global crisis and largely different from other epidemic diseases, continues to promise that “after darkness, there is a much brighter sun” (Mevlana, 1988).

b. Case Country- Malaysia

i. History of Tourism Development

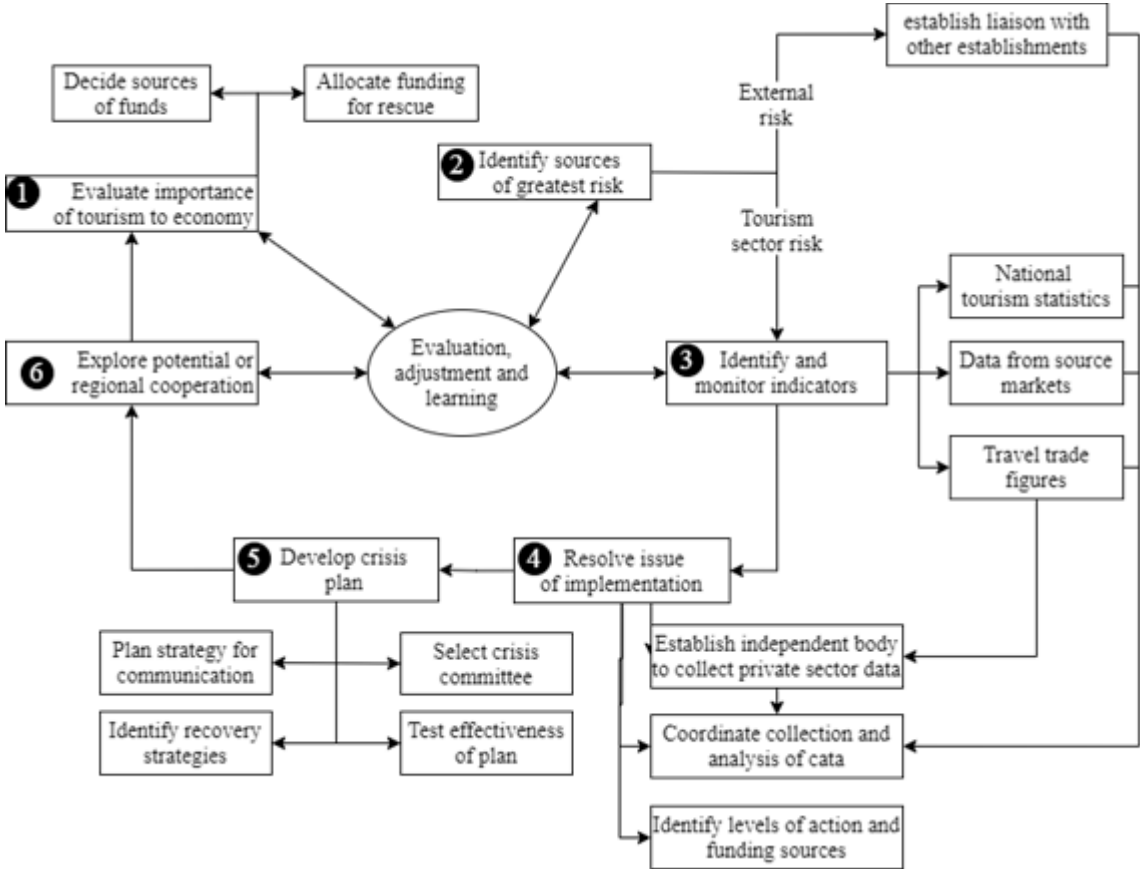
Tourism in Malaysia has become a major source of foreign exchange particularly after the 2000s. The Tourism Department was first introduced in 1959 under the Ministry of Trade. The successive governments in the country continued to invest not only in the development of infra-structure and service quality in tourism but also promotion of the country as a tourism destination. The Tourism Ministry was first established in 1987. Both natural and cultural resources integrated with efficient management made Malaysia an important destination which ranked among top ten receiving destinations in 2009 (Mosbah & Saleh, 2014). The number of hotels for example increased from 989 in 1990 to 4826 in 2019.

Tourism makes around 5% direct contribution to GDP and employment (COMCEC Outlook, 2019) with indirect effects tourism makes up 23.6% of employment and 15.9% of GDP (Yasim, 2021). Malaysia hosted around 26 million tourists earning around 22 billion USD in 2019. Two government institutions are responsible for tourism in Malaysia; the Ministry of Tourism (i) and Malaysia Tourism Promotion Board (ii). Main markets of Malaysia include the neighbouring ASEAN countries (e.g. Singapore, Indonesia, China, Thailand, Brunei etc). Besides Malaysia’s successful international promotional campaigns such as “Beautiful Malaysia”, “Only Malaysia”, “Fascinating Malaysia”, and “Malaysia Truly Asia”, the country also positions itself as a major tourist destination for silver hair retirees to reside in Malaysia with “Malaysia My Second Home” campaign.

Malaysia’s tourism is experienced in managing crises and epidemics. During the Asian financial crises in 1997 the tourism revenue fell by 14% and tourism employment decreased by 24% (Sausmarez, 2004). Bali bombings, H1N1 are other crises affected Malaysian tourism. Malaysia is also affected with crises originating in other countries, forest fires, tsunamis,

earthquakes and so on. Considering epidemics, SARS for example had resulted in a 20% decrease in tourism volume in 2003 (UNWTO, 2005). The same year the Malaysian government introduced stimulation packages, increased public spending, expanded infrastructure investments, and reduced taxes. Tourism promotion campaigns are also organized for different target markets.

Figure 40. Crisis Management Model



Source: Susmarez, 2004.

As displayed in figure 40 Malaysian crisis management policy is based on several components and stages. Identifying and deciding on sources of funding based on the importance of tourism for the economy is considered as the initial step. For example a large promotion budget of approx. 40 million USD was approved during the Asian financial crises mainly to fund Malaysia Truly Asia Campaign. This was fourfold the amount of previous promotional funding. Risk management and identifying potential sources of threats (external vs tourism related) and their possible impacts were also mentioned as a pre-crisis strategy. After identifying potential threats it is important to monitor early warning signals of a crisis before its development. Today's big data and AI technologies might help simulate different scenarios.

However there needs to be a system of continuous environmental scan, data collection and analysis not only in tourism but also other sectors of the economy and source markets as well.

Comparing the data with previous crises and their impacts, these systems might provide a more informed response. There is also the need for effective coordination among tourism stakeholders and distribution of roles and responsibilities in managing crises. Institutional structures and their roles in crisis management implementation should also be detailed. The speed and appropriateness of response is important however without a destination level coordinated strategy and communication between different stakeholders and central government the individual responses have short-term impacts.

Customizing national level strategies to regional needs emerges as another challenge and an independent institution at regional level (e.g. regional DMOs) might be empowered to tailor for local needs. A crisis management plan based on previous experiences, including a strategy for communication, crisis committee and alternative recovery strategies should also be drafted.

Most tourism crises also affect regions other than independent states, such as epidemics. Even crises that affect a distinct area of a country affect demand in neighbouring countries. Thus there is a need for international collaboration and collective effort to contain the impacts of crises. This is particularly important in the case of epidemics where each country responds with a different border policy instead of a unified, predictable response. The final step of crisis management of course is based on feedback and evaluation. There is a need for continued learning after each crisis and a better understanding of indicators, impacts and effectiveness of responses.

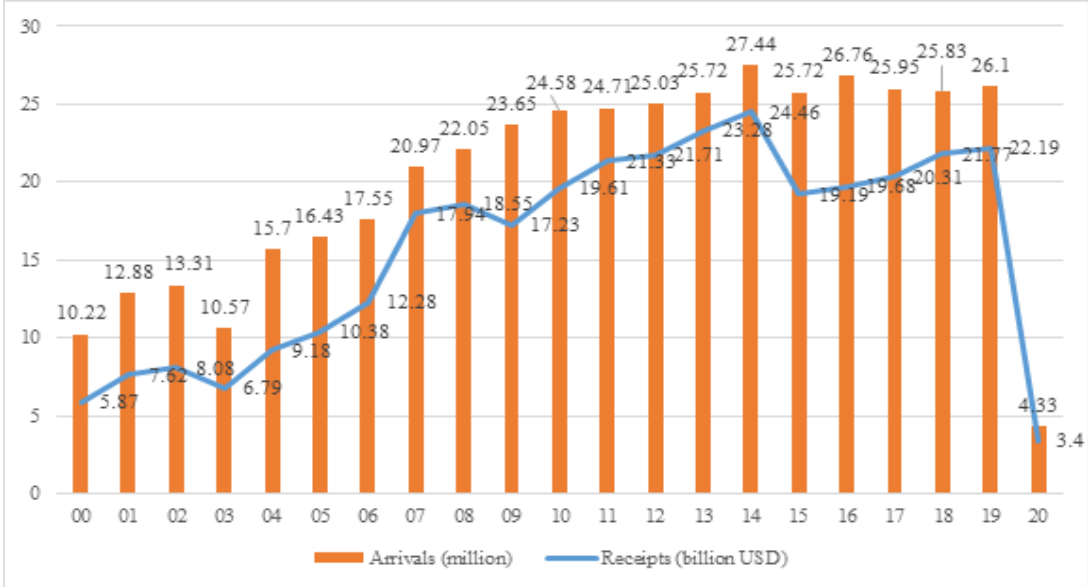
ii. Impacts of Covid-19

The tourism industry in Malaysia creates 11.7% of the gross domestic product, and 15.1% of employment (2,7 million people) (WTTC, 2021). Malaysia's tourism industry has faced many crises like economic crisis, natural disasters, and terrorism from 90s to today. But the tourism industry in Malaysia successfully has overcome these challenges and has become a more resilient industry. Considering the tourism income of Malaysia, which was 21,4 billion USD in 2019, the Covid-19 crisis resulted in a %86 decrease to 3,4 billion USD (WTTC, 2021). Tourism arrivals also dropped from 26 million to 3.4 million arrivals accounting for a 84% decrease as well (Yasim, 2021). Reports revealed that neighboring ASEAN countries also saw

a significant decline in the number of tourists, including Thailand (-83.2%), Singapore (-85.7%), Vietnam (-78.7%), and Indonesia (-75%). Unfortunately, apart from a few city hotels, many tourism businesses, airlines, travel agencies, tourist restaurants, and transporters have been closed with many of them forced to lay off employees. Considering the multiplier tourism creates, the decline in tourism activity will have ripple effects on the rest of the economy. Fortunately Malaysia already vaccinated more than 55% of her population and the tourism industry has recently started to open with increasing demand in summer months and relaxation in lockdowns.

Tourism volume in Malaysia has experienced a significant increase in the number of arrivals over the past two decades. 10 million international arrivals in 2000 reached 23 million in 2009, in which the same year the country has been listed among the top 10 most visited countries. Malaysia’s tourism reached its peak in number of visitors in 2014 (27,4 million). The number of arrivals in 2019, before Covid-19 was 26 million tourists and receipts were around 22 billion USD.

Figure 41. Malaysia Tourism Volume between 2000-2020



As displayed in the figure 41, Malaysia’s tourism industry has seriously decrease in 2003 because of SARS. Between 2004 and 2014, the tourism volume steadily increased and reached the highest number of visitors in 2014. Then the volume stabilized around 26-27 million. Despite Malaysia has also faced various other crise such as, economic crisis, natural disasters, and terror events, no previous crises resulted in an 84% decline in tourist volume from 26 million arrivals in 2019 to 4 million in 2020. Tourism receipts also fell by 86% from

21 billion USD to 4 billion USD. Domestic tourism also saw -44.9% decrease in 2020 (DOSM, 2021).

Figure 42: Malaysia Tourism Volume amid Covid-19

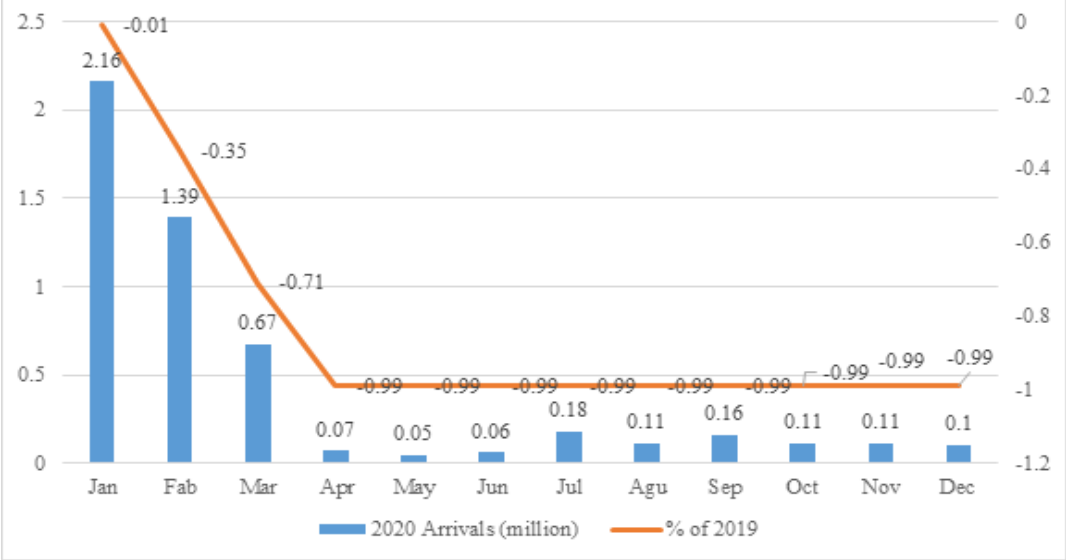
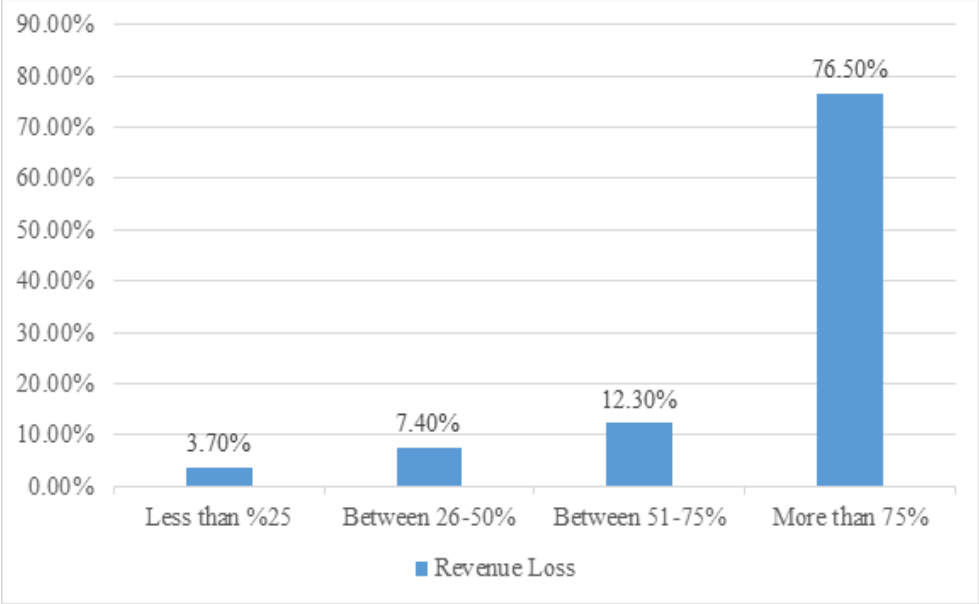


Figure 42 above shows the state of the tourism industry amid 2020 in Malaysia. Unlike other destinations in the west Malaysia started to feel the impacts of Covid-19 right after Jan. 2020. However after March 2020 the impacts were much more severe; tourism volume dropped to almost 99% compared to 2019 numbers. Based on the empirical data collected between July and Aug. 2021 from 81 tourism executives operating in Malaysia 76 of the respondents experienced a more than 75% decrease in revenues as displayed in figure 43.

Figure 43. Tourism Industry Revenue Loss during Covid-19



When tourism industry representatives were asked about the duration they would continue operations without any additional support 50% of the respondents predicted they can continue their operation less than 3 months without any external support. Only 3.7% of respondents forecasted they would still survive if the pandemic extends for another year. In addition, respondents estimate they would survive for an average of 4.7 months.

Figure 44. Survival without external support (months)

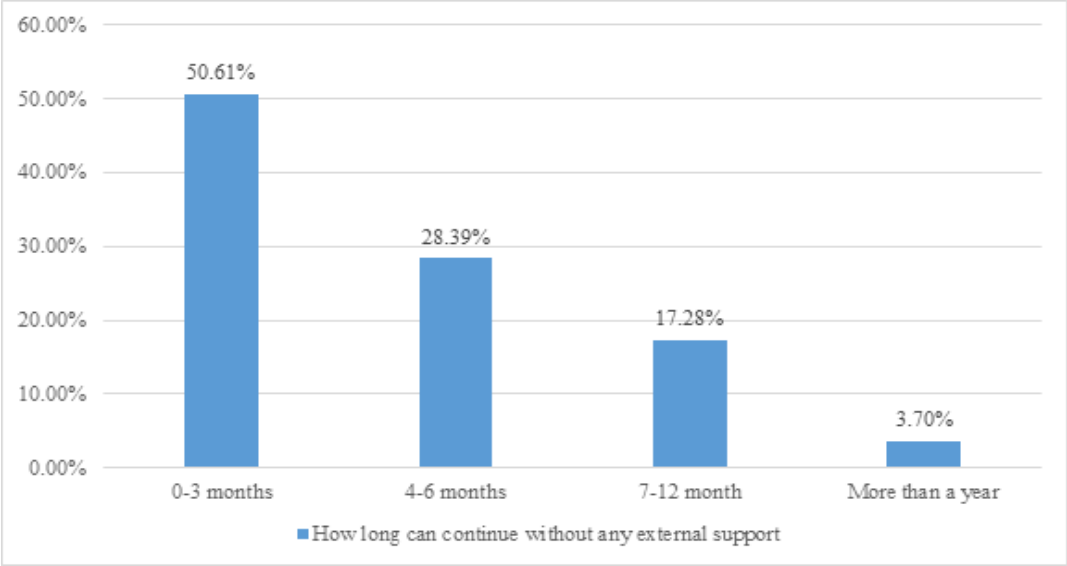
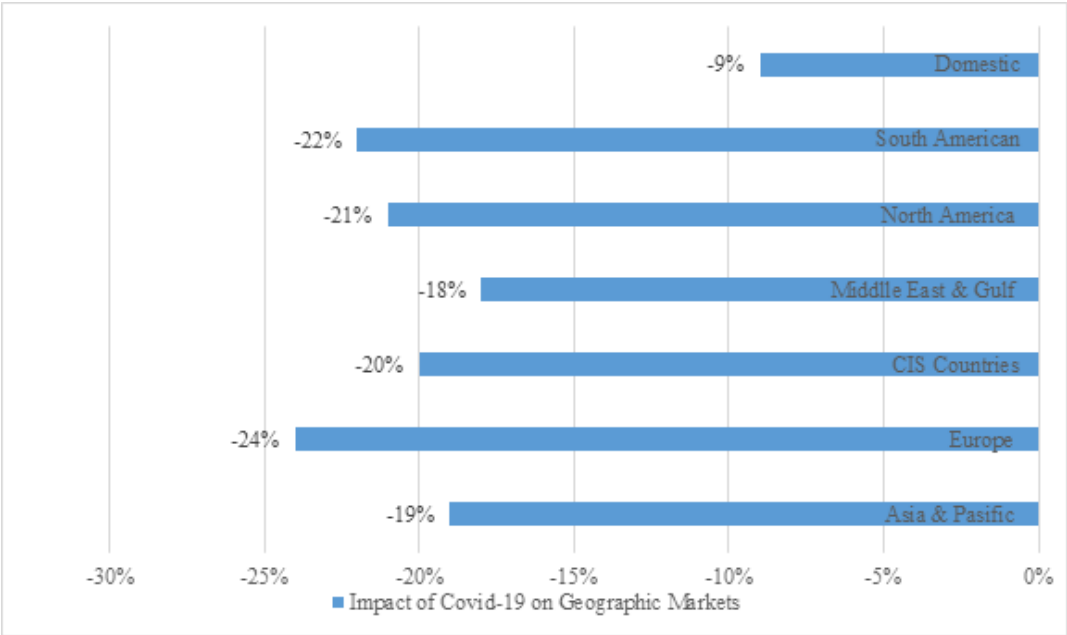
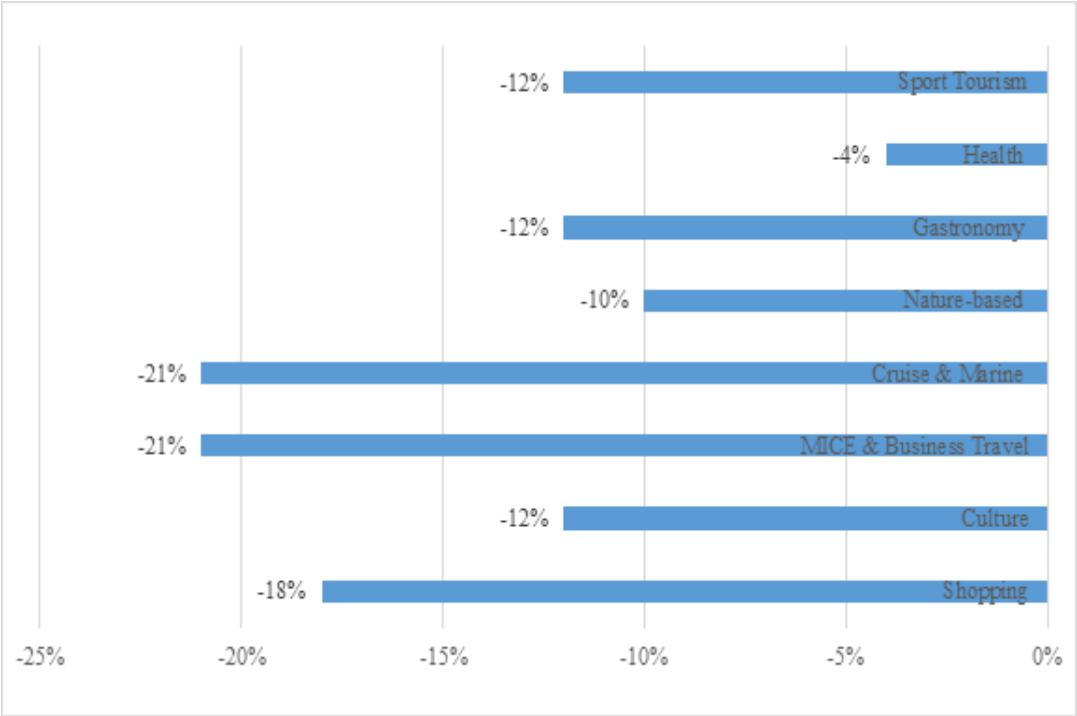


Figure 45. Impact of Covid-19 on Geographic Markets



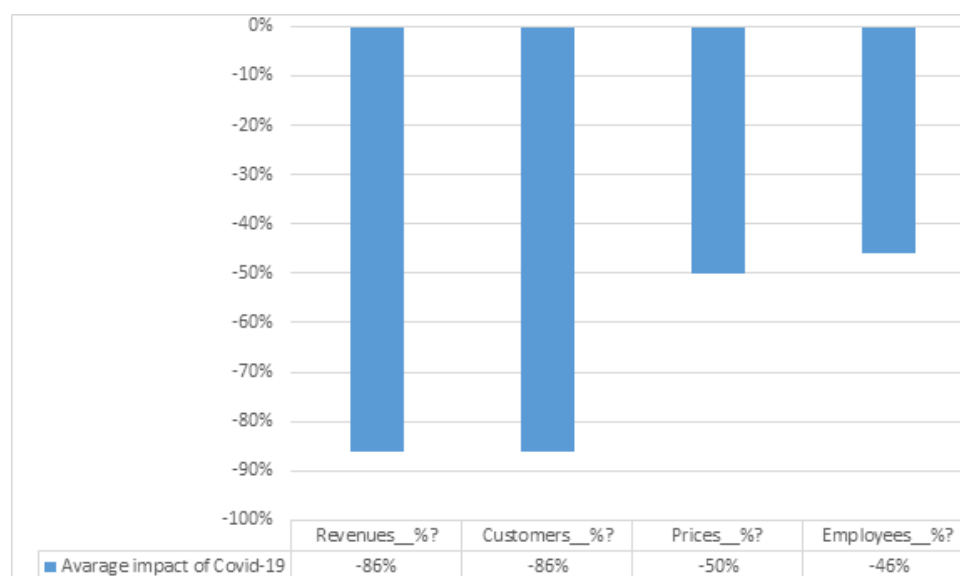
Respondents were also asked about their perceptions of the state of the demand from different geographic markets. Naturally all markets have declined, but domestic tourism was identified as more resilient (9% decline). Rest of the markets Europe (-24%), South America (-22%), North America (-21%), CIS Countries (-20%), Asia & Pacific (-19%) and Middle East & Gulf (-18%) were listed markets with significant declines respectively. However the percentages are much lower when compared to 85% decrease in volume in 2020. Thus the arrivals seems to have been recovering for the past months till Aug., 2021.

Figure 46: Impact of Covid-19 on Tourism Types (%)



Concerning predictions on different tourism types, health tourism (-4%) and nature-based tourism (-10%) were identified as the most resilient tourism types. Whereas Cruise and Marine tourism (-21%), MICE & Business travel (-21%), shopping tourism (-18%), Sport tourism (-12%), Gastronomy (-12%) and Cultural tourism (-12%) were the most affected tourism motivations.

Figure 47. Impact of Covid-19 on Performance Indicators (%)



The performance indicators also show a major decline in both revenues (-86%) and customers (-86%). These are inline with the 86% decrease in tourist volume in 2020. Covid-19 also had severe impacts on average prices (-50%) and number of employees (-46%). Fortunately, both prices and employment stayed strong compared to the decline in volume and revenues.

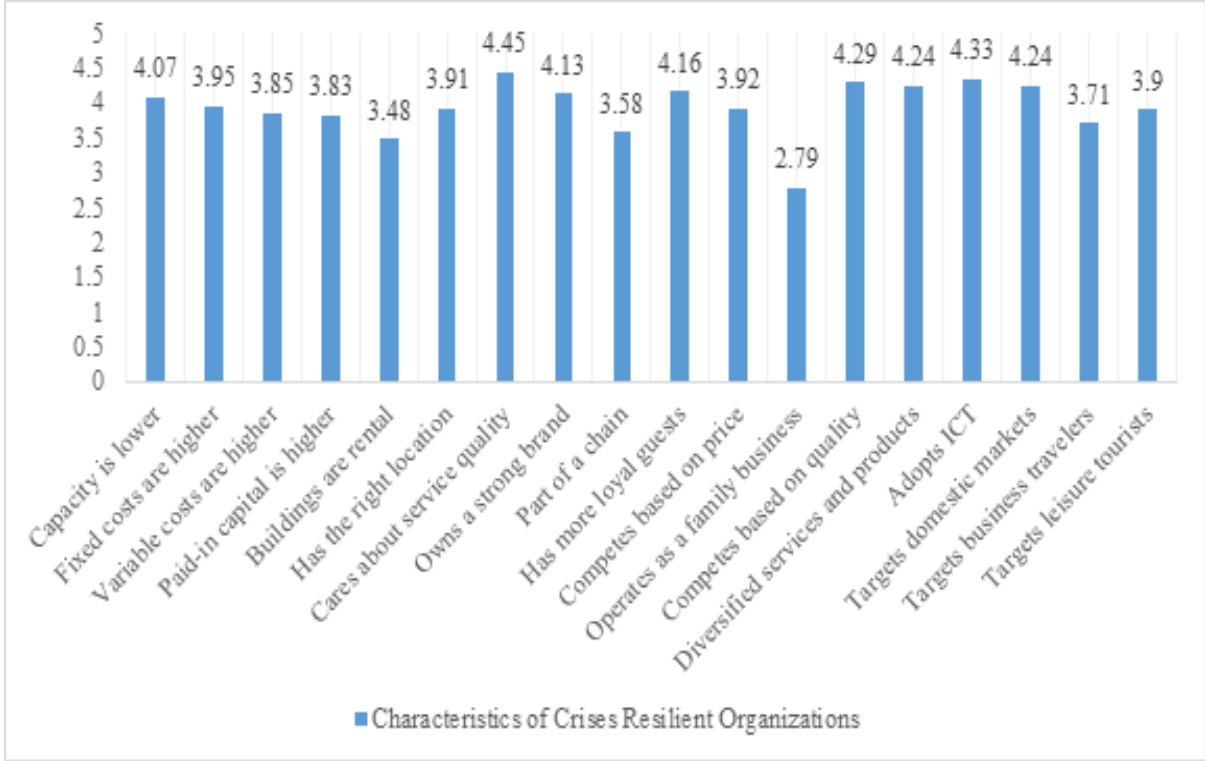
iii. Mitigation of Covid-19

1. Industry Strategies

Tourism industry utilized various survival strategies in order to adapt to Covid-19 and the transformations that are brought by it. After the literature review and qualitative interviews these were listed and converted into a survey. As discussed at the methodology section the survey data was collected from 81 respondents in Malaysia (45 travel Agencies, 24 hotels, 2 restaurants, and 10 others (e.g. events, theme parks, guiding services, touristic shops). Industry representatives were first asked the characteristics of Crises Resilient Organizations. Caring about Service Quality (4,45), Utilizing information and communication technologies (4,33), Competing Based on Quality than Price (4,29), Offering Diversified Products and Services (4,24) and Targeting Domestic Tourists (4,24) were identified as most important characteristics of crises resilient organizations. Domestic tourism was proven to be the most resilient source market, based on statistics domestic tourists experienced only a 48% decline in 2020.

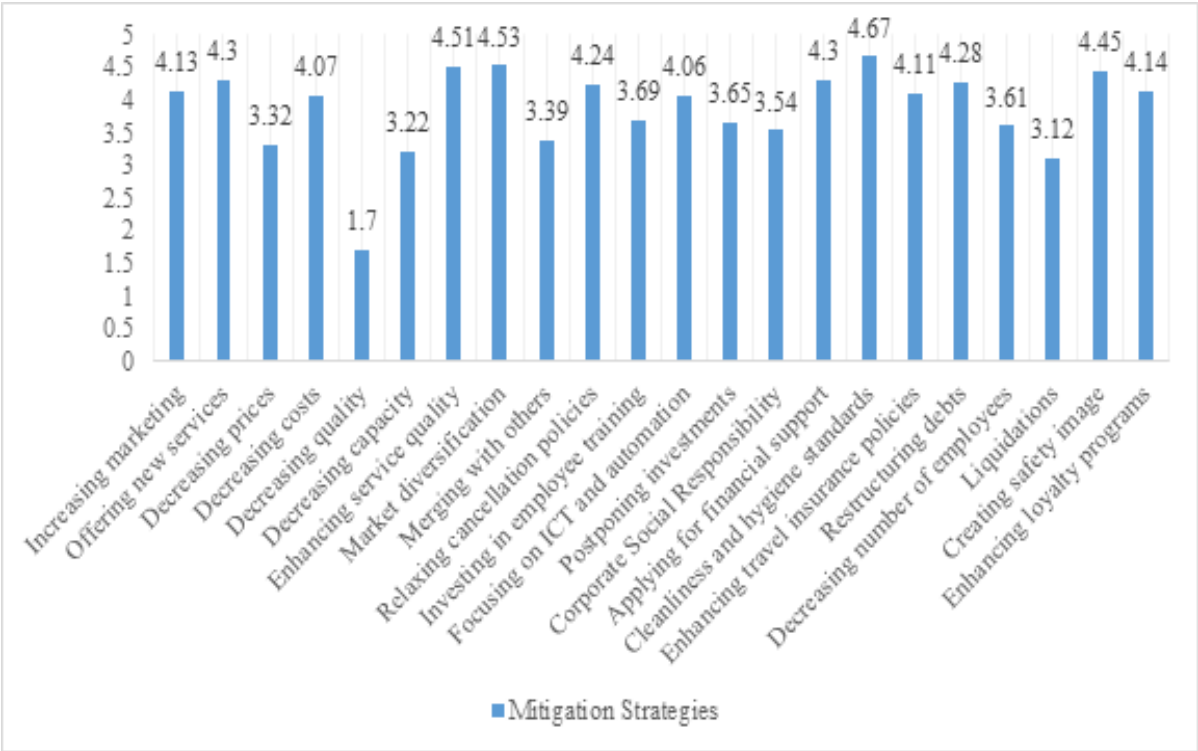
Compared to the 84% decline in overall tourist arrivals, domestic tourists still made a significant market (130 million) in 2020 (Yasim, 2021). On the other hand if the tourism business is a Family Business (2.79), Operating in Rental Buildings (3.48), Part of A Chain (3.58) and Targets Business Travelers and MICE (3.71) then they have less chance of survival. These are displayed in figure 48 below.

Figure 48. Characteristics of Crises Resilient Organizations



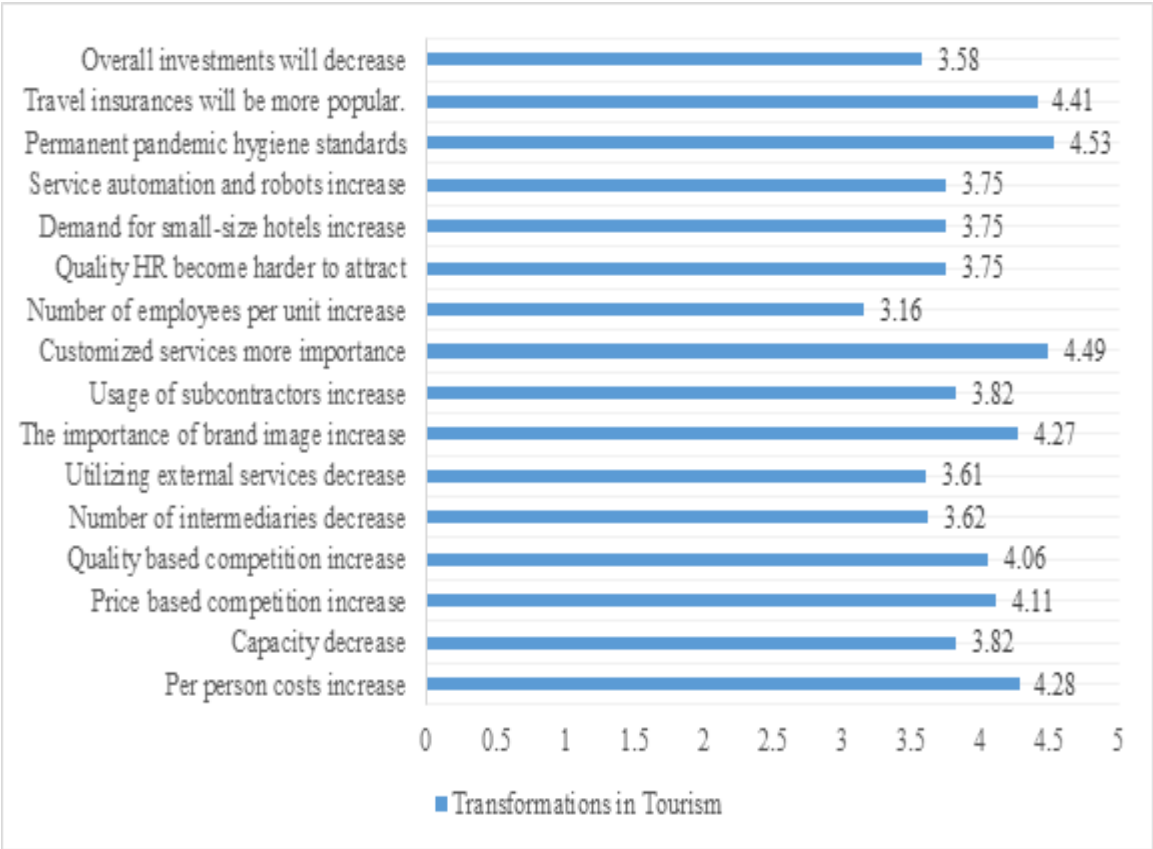
Based on data collected, enhancing cleanliness and hygiene standards (4.67), market diversification (4.53), enhancing service quality (4.51), creating safety image (4.45), offering new products and services (4.30), applying for financial support (4.30) were listed as the most important mitigation strategies. Decreasing quality (1.76), Liquidation, selling operations and businesses (3.12), decreasing capacity (3.22), decreasing prices (3.32) on the other hand were identified as less popular strategies to fight with Covid-19. Importance of hygiene and the safety image that comes with it, service quality, and both product and market diversification were identified as areas that might help the tourism industry survive impacts of Covid-19.

Figure 49. Tourism Industry Mitigation Strategies



Finally, experts were also asked about their attitudes about the future transformations in the industry. Most respondents think that pandemic hygiene standards (4.53) will become permanent after Covid-19. They also think that customized services (4.49) will be more important than standard mass package products. Increasing popularity of travel insurance (4.41) systems, increasing per person costs (4.28) and heightened importance of brand image (4.27) were also seen as a part of the transformation. Considering decreasing prices, coupled with increased costs, tourism industries’ potential to generate revenues has obviously declined. Social distance and hygiene standards also increase costs. For example, hotels now have to use disposable kits, water analysis, isolation rooms, employee checks and additional disinfection material as per safe tourism certification, and they also need to pay for monthly audits. Social distancing measures also decrease capacity and raise per person costs of operations. In order to avoid risks travelers will also look for hygiene standards, branded hotels and services, insurance systems in case of realized risk and prefer customized products rather than mass package tours.

Figure 50. Transformations in Tourism after Covid-19

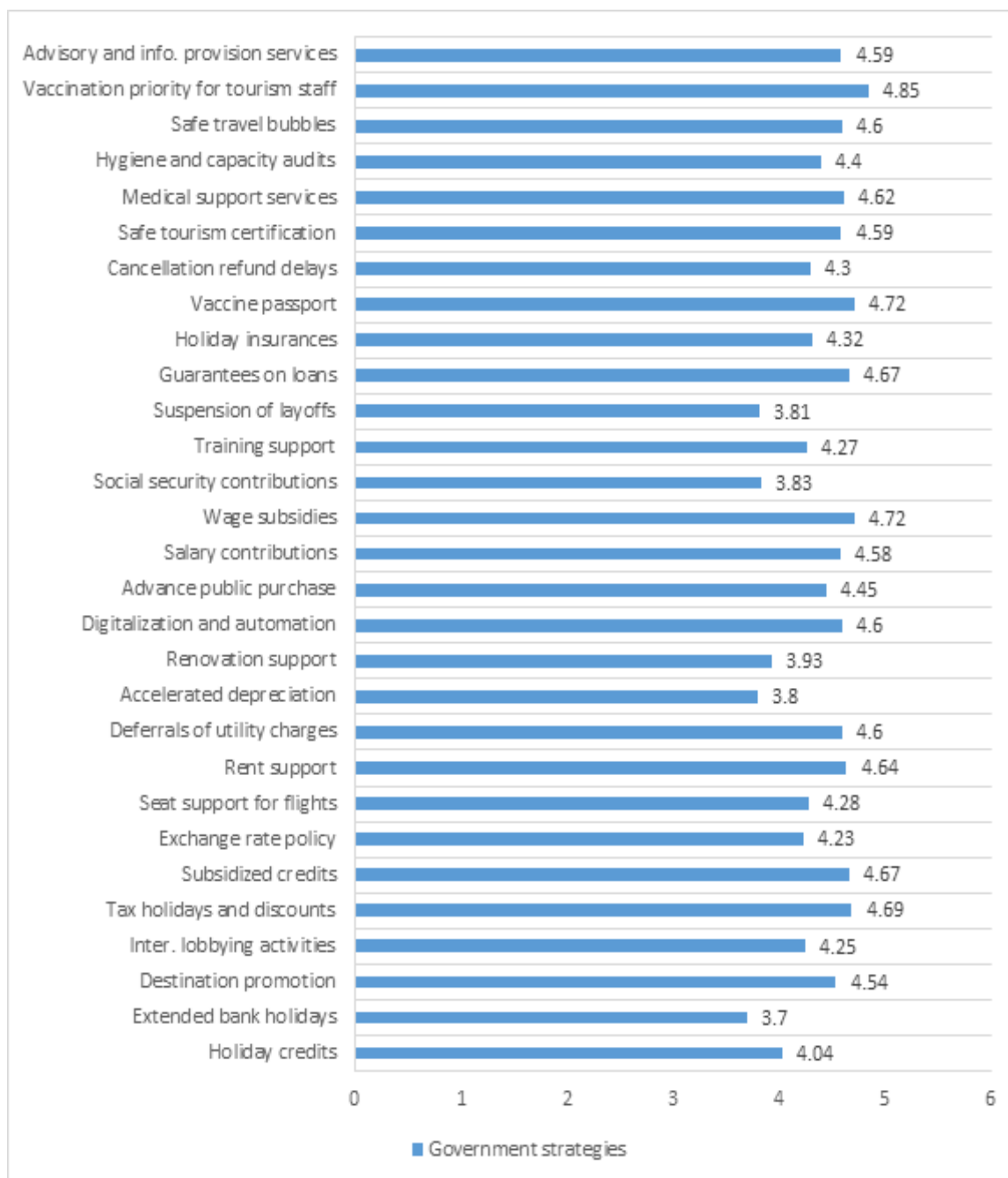


2. Government Strategies

Experienced from previous crises, the Malaysian government offered various credit facilities, employment support, safe tourism certifications, promotional activities and legislative actions. The importance of these actions were also evaluated by the 81 tourism industry experts in Malaysia. These strategies were grouped under five themes as Demand Facilitators, Financial Support, Employment Support, Legislative Actions, and Operational Processes.

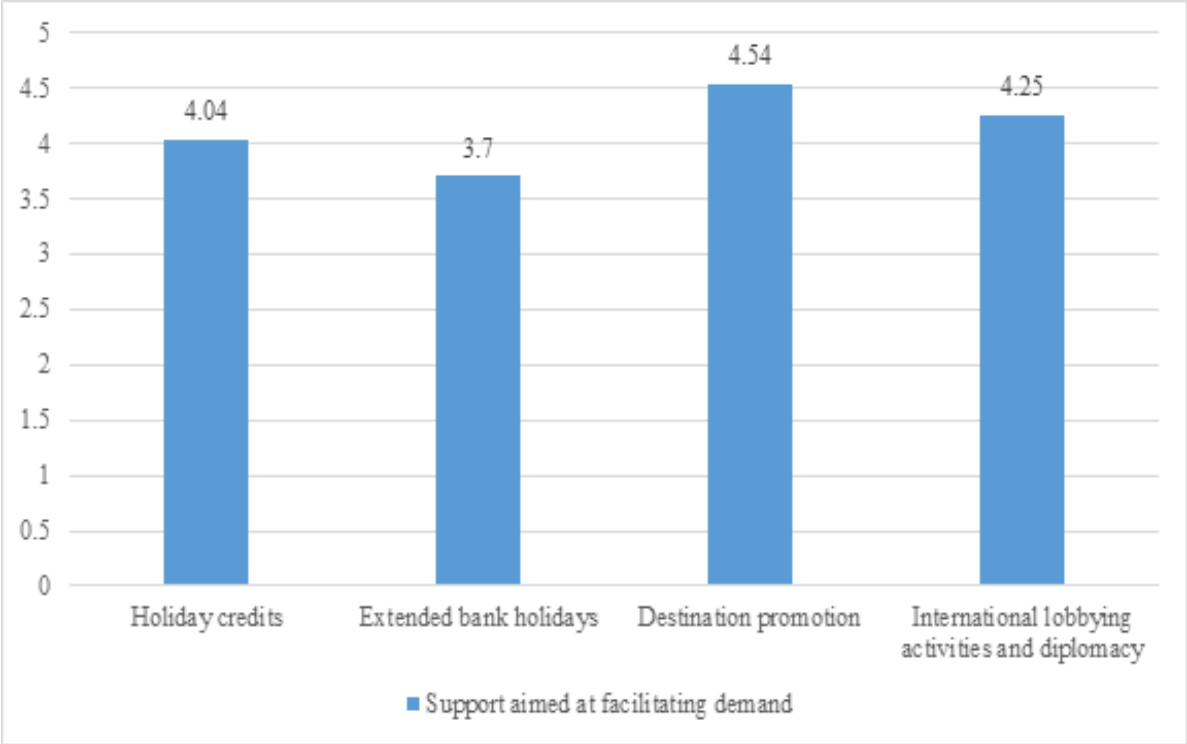
Government has an important role in facilitating initial demand after each crisis. Overall Government has an important role in facilitating initial demand after each crisis. Vaccination priority for tourism staff (4.85), vaccine passports (4.72), wage subsidies (4.72), tax holidays and discounts (4.69), subsidized credits (4.69) and government guarantees on loans (4.69) were rated as the most important governmental mitigation strategies as displayed at figure 51 below.

Figure 51. Government Mitigation Strategies



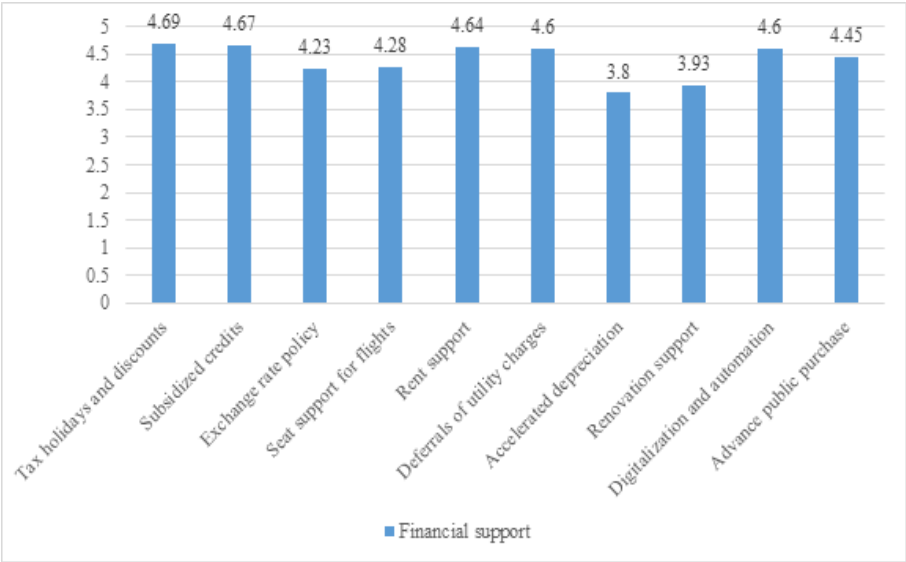
Destination promotion activities (4.54) and international lobbying and public relations (4,25) to create a safe image of the country were seen as the most important strategies under action targeted to facilitate demand. Additionally, holiday credits for locals (4.04) and extended bank holidays (3,7) that would trigger holidays by residents were also rated important to stimulate domestic demand.

Figure 52. Support aimed at facilitating demand



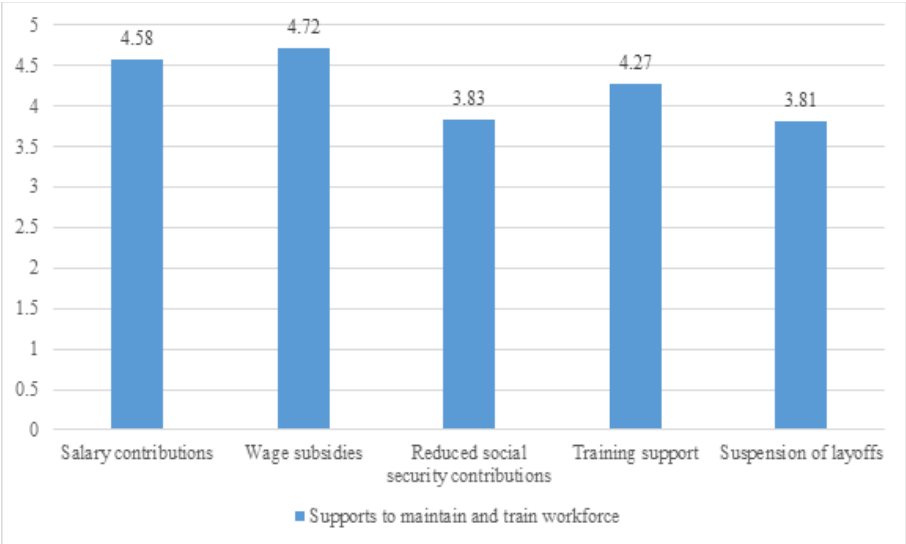
Another group of government strategies was under Financial Support. Covid-19 had a devastating impact on cash flow in the tourism industry. Based on industry representatives' ratings, Tax Holidays and Discounts (4.69), Subsidized Credits (4.67), Rent Support (4.67), Deferrals of Utility Charges (4.60) were rated as most important support. These can also be considered to have a direct and immediate impact on cash flow. Support for Digitization and Automation (4.6), Advance Public Purchase (4.45) of tourism services, seats, rooms, meetings, Seat Support for Flights (4.28) organized mainly for charter airlines, trying to Maintain a favorable Exchange Rate Policy for tourists (4.23), Renovation Support (3.93) to improve physical facilities, and Accelerated Depreciation (3.8) to offer a quicker tax deduction were also rated above average. These are displayed on figure 53 below.

Figure 53. Financial support



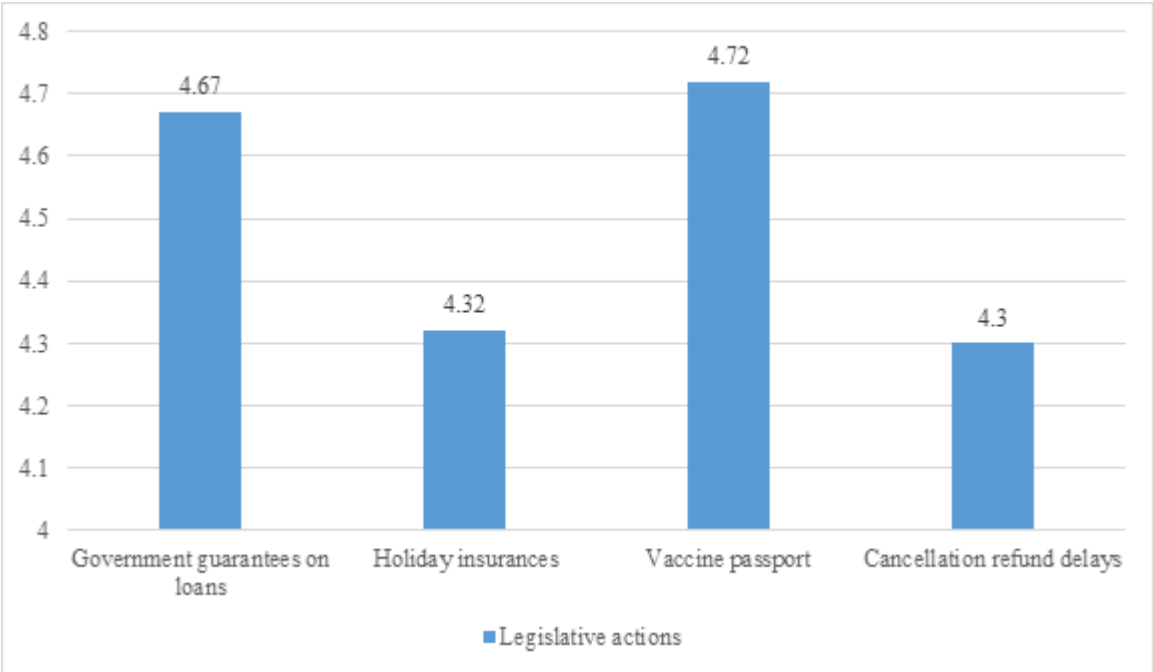
The third group of government mitigation strategies were centered around the tourism workforce. Because tourism is a human intensive service, it employs more people than other industries and therefore companies’ HR costs are considerably high. This is why all subsidies targeting to maintain and train tourism HR were perceived as important by industry experts. Wage Subsidies (4.72) for example received the highest rating among these strategies. Salary Contributions (4.58), Training Support (4.27), and Reduced Social Security Contributions (3.83) were also rated important. Suspension of Layoffs (3.81) which bans any dismissal of employees was naturally less popular.

Figure 54. Supports to maintain and train workforce



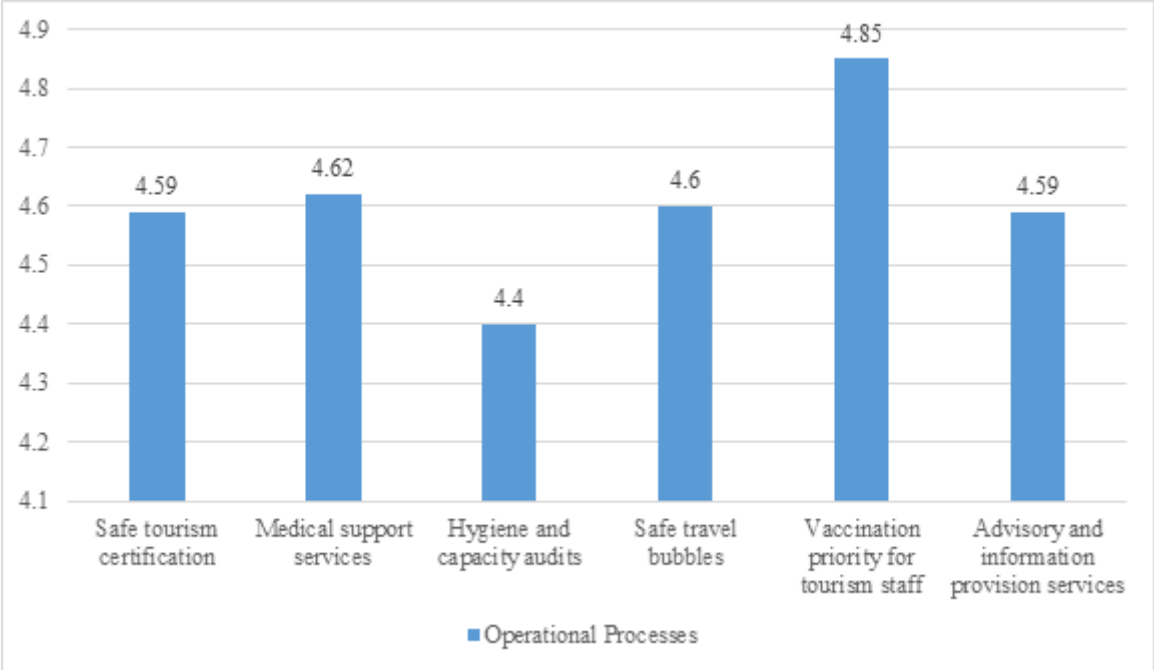
Legislative actions, regulations and standards were also introduced during Covid-19 to help industry survive the crises. Introducing Vaccine Passports (4,72) to stimulate travel, Government Guarantees on Loans (4,67) in order to encourage banks to provide credits to industry, Holiday Insurances (4,32) to reduce risk of travellers, and Cancellation Refund Delays (4,30) so that cancelled reservations can be converted into vouchers or be postponed to be refunded at a later date.

Figure 55. Legislative actions



Finally 81 Malaysian tourism experts were asked about operational processes introduced and overseen by the government. These items are Vaccination Priority for Tourism Staff (4,85), Medical Support Services (4,62) incase needed, Safe Travel Bubbles (4,60) isolating tourist journey so that they do not interact with residents, Advisory and Information Provision Services (4,59) and the accuracy of data are important for the industry to adjust themselves to developing situations (number of cases in a destination), Safe Tourism Certification (4,59) covering major preventative standards, and Hygiene and Capacity Audits (4,40) to ensure safety standards are complied with. There are actually two approaches to manage tourism flows. The first one is to eliminate tourists at the border which is not very effective considering the tests, quarantines and the nature of the virus. The 2nd approach is to isolate tourists and prevent much interaction with locals. Vaccinating tourism employees are important, in order for the 2nd strategy to work.

Figure 56. Operational Processes



To conclude, expert’s opinions about government strategies, vaccination priority for tourism staff is rated as the most important strategy to create isolated travel bubbles and contaminate any possible spread to locals. Human resources are very important for service quality in tourism and a major cost for the industry and stakeholders also rated wage subsidies as important. Vaccine passports can be used as a tool in controlling the pandemic and starting tourism activities hence they were also rated important. On the other hand, extended bank holidays to create demand and accelerated depreciation that would reduce the amount of tax were rated as the least important strategies.

iv. Policy Recommendations

Malaysia has proven to be an expert in post-crisis promotional strategies as well as stimulating alternative markets, particularly domestic tourist demand. During times of crises Malaysians were encouraged to spend their holidays in the country. Realizing its potential, the Government started promoting internal tourism (e.g. Cuti-Cuti Malaysia, Our Malaysia, Malaysiaku, Malaysia Destinasiku) (Badaruddin and Yusnita, 2005). There were also some regulations for the money that can be spent abroad and selling of local currency in order to encourage domestic tourism. Significance and resilience of the domestic tourism market was also confirmed by industry representatives and domestic tourism was identified as the most

resilient tourism market. Organizations targeting domestic tourists were also identified as more resistant to crises.

Besides domestic tourists, the Middle-East & Gulf market was also identified as more resilient hence there is a need to diversify the source market from Asia & Pacific to other generating markets. Market diversification was also mentioned as an important strategy by the industry representatives. Hence communication strategies targeted to these new markets are suggested. Malaysia is already proven successful in various promotional campaigns in Tourism. Creating a safety image and destination branding can also be accomplished with efficient promotion. Industry representatives also discuss new products and services such as health tourism and nature-based tourism as more resilient. Relaxed cancellation procedures and travel insurance facilities were also stated important in order to build trust in the market.

The brand messages would also be created for different destinations offering potential to attract health tourists and nature-based tourism, eco-tourism and so on. Diversification is another strategy adopted by Malaysia and besides beach tourists and business travellers the country positioned itself as an eco-tourism and a medical tourism destination (Asian Intelligence, 2011). Yasim (2021) also suggests open air, low density activities and rural tourism that provide authentic and responsible experiences as alternative tourism activities. Such customised tours are expected to replace mass package tours. Utilization of automation and technology were also identified as important service delivery strategies to minimize human interaction and spread of the virus.

Of course the safety image is not effective in the long term if it is not backed-up by operational procedures. Vaccination of tourism staff, safe tourism certificates, hygiene standards, and audits are also identified as significant during the empirical study. Introduction of vaccine passports and creating travel bubbles were also mentioned as important. International collaboration, lobbying and public relations activities would also improve the impact of such activities.

Cooperation between national and regional, and public and private sectors is also important in identifying different actions customized for different destinations. Hence regional governance and DMOs should be empowered to decide on how to collectively adapt to crises and which strategies to implement. Yasim (2021) also suggests PPPs in strengthening governance, co-organizing tourism and reinventing products. For example a seat support might

not work for a destination that does not have an airport and targeting domestic tourists driving to the destination. Big data, its collection, analysis and utilization to create different scenarios and monitor indicators is therefore important to reach effective decisions was also identified as an important strategy. This is inline with Yasim, (2021) who stresses the importance of data to create agile strategies and develop countermeasures.

Enhancing service quality was also mentioned as an important strategy. This period of crises can also be used for renovation and developing HR needed for a more qualified and competitive product. Hence incentives for renovation and employee training are also recommended. Infra-structure investments, restructuring organizations (e.g. DMOs) and investing on digital platforms can also be planned during the time of crises. Yasim, (2021) suggests upskilling human capital, implementing tourism 4.0 through technology and touchless services.

All government support has scored important including financial, legislative, employment, operational measures and strategies to enhance demand. Particularly operational activities such as vaccination are important as the government has been acting as the central body to act upon crises and regulate its spread. Financial support including Tax Holidays and Discounts, Subsidized Credits, Rent Support, Deferrals of Utility Charges have an significant impact on cash flow. During the lock-downs most tourism organizations were dependent on these support. Employment support such as Wage Subsidies , Salary Contributions, Training Support, and Reduced Social Security Contributions were also rated significant. As a human intensive service, HR is a major cost for the tourism industry. Moreover the quality of services is directly related to the quality of HR. Hence measures that are directed to protect and up-skill work force are important strategies. Legislative support including Introducing Vaccine Passports to stimulate travel, Government Guarantees on Loans in order to encourage banks to provide credits to industry, Holiday Insurances to reduce risk of travellers, and Cancellation Refund Delays were also rated as exceptional strategies to keep the tourism system alive. Finally activities aiming to stimulate demand which include facilitating domestic tourism through; holiday vouchers and credits, and extended bank holidays and promotional activities; including creating a safe image, and international PR are important in creating short-term demand, which is crucial for the industry to survive.

c. Case Country- Azerbaijan

i. History of Tourism Development

Although Azerbaijan struggled with the transformation to market economies during the 1990s, particularly during the last decade the economy stabilized and became stronger (Demiroglu and Muller, 2021). Starting with the “State Program of Tourism Development” initiated in 2002 tourism received the center of focus in diversifying the economy beyond the oil industry. Government initiated various development programs for tourism including destination development and attracting investments to resort destinations. This strategy of creating an oil-independent economy has been proven successful with declining oil prices during recent years. 2011 was also declared the year of tourism to stress importance of tourism for the economy.

Development of various tourism types in different regions of the country, improving service quality are identified as main objectives in tourism development by the Ministry of Economy in the State Program for 2019-2023 (Demiroglu and Muller, 2021). Government is also relaxing the visa regime (Asan Visa system) parallel to growth objectives in international tourism. These efforts have paid off and the tourism industry experienced a significant growth and created an ideal case for destination development (Hasanli, Rahimli and Salihova, 2021). The number of tour operators increased from 197 in 2013 to 432 in 2019. Number of hotels also increased from 530 to 642 between 2013 and 2019. Tour packages sold to international tourists excluding Azerbaijan citizens also grew by 250% between 2013 to 2019 from 4,599 to 11,469 tours (Babayeva, 2021). Number of tourism employees also grew from 40,892 to 53,222 between 2013 and 2018 (Samedova and Abbasova, 2020).

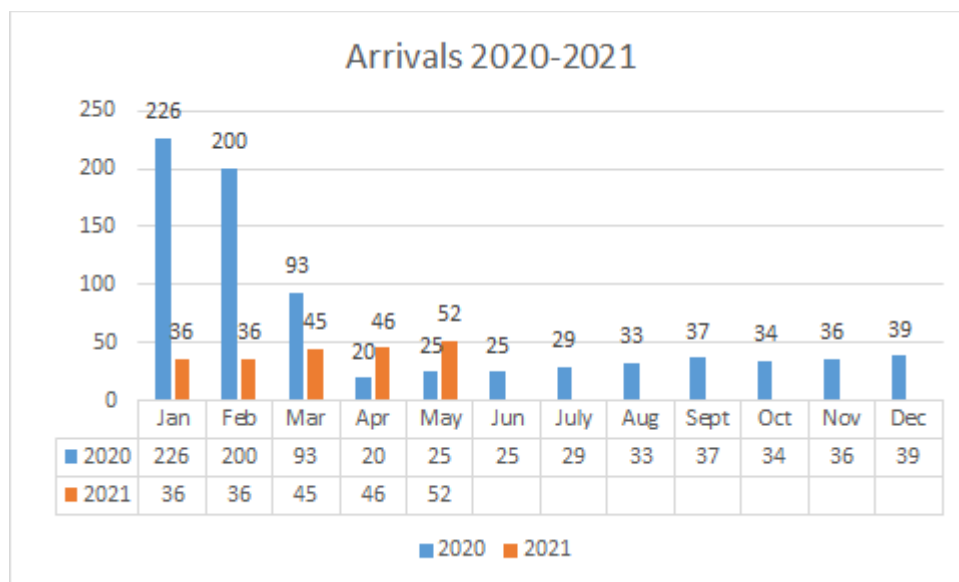
The country had a record year for arrivals in 2019 with 2.9 million international tourists from 2 million in 2010 (Azizova and Huseyn, 2021). Russia, UAE, Georgia, Turkey and Iran are the major source countries. Tourism receipts also increased from 621 million USD to 2,634 million in 2018. Tourism makes around 8% of both GDP and employment in the country (WTTC, 2021).

Particularly during recent years, the government has invested in institutionalization of tourism development by establishing the State Tourism Agency, Azerbaijan Tourism Board, Tourism and Recreation Zones and Tourism Information Centers. Regional DMOs were also established in various tourism destinations.

ii. Impacts of Covid-19

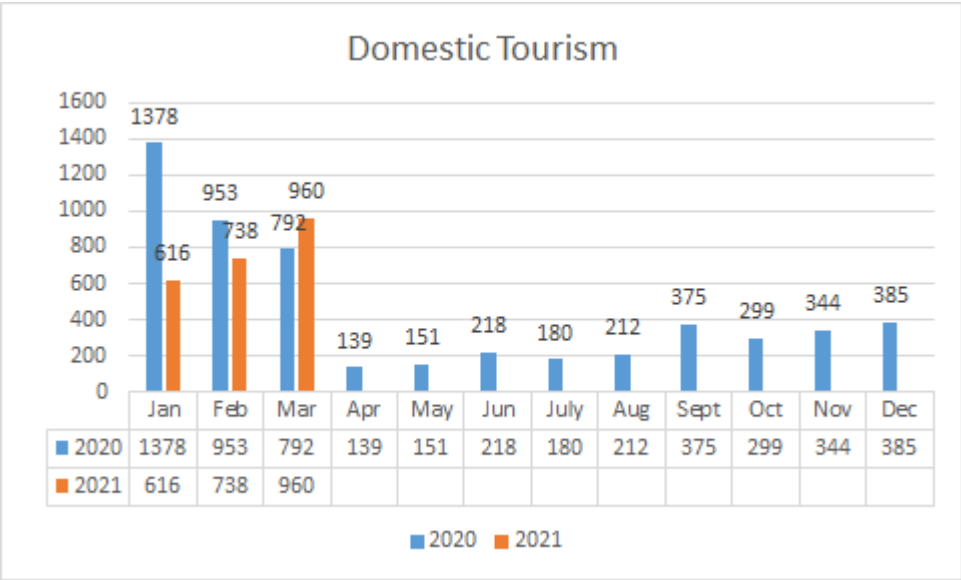
Azerbaijan also faced various crises, besides the global economic crises of 2001 and 2008. Nagorno-Karabagh conflict and Covid-19 were the most recent and serious crises that the developing Azerbaijan tourism faced. Since 2020 March tourism volume experienced a significant decline in Azerbaijan. Tourism's share in GDP also declined to less than 1% from 2.6% before the crisis. Arrivals also declined by almost 80% comparing Jan. 2020 and Jan. 2021. However from March, 2021 onwards with increased vaccination the arrivals also started to pick-up doubling each month.

Figure 57. Tourism Arrivals 2020-2021 (Thousands)



With mitigation measures and relaxed quarantine measures domestic tourism also started to grow to almost pre-crisis volume as shown at table. Despite domestic tourism spending decreasing by almost 80%, during the first quarter of 2021, it recovered back to 70% of the same period in 2020. Volume of domestic trips also increased by 21% in March 2021 compared to March 2020. Revenue generated by accommodation units and number of overnights also quadrupled in March 2021 compared to previous year. This recovery in lodging volume was also led by domestic tourists which increased their overnights by almost seven times in March 2021 compared to previous year. F&B revenues which were also significantly affected by quarantine measures also experienced a strong recovery by almost 270%. Hence, tourism in Azerbaijan entered a recovery period led by domestic tourism. International tourism also experienced a continuous growth in overnight stays starting from May 2020 but has not yet reached its full potential.

Figure 58. Domestic Tourism (Thousands) 2020-2021



Based on tourism expert surveys (14) from Azerbaijan a major part of organizations (64%) stated they lost more than 75% of their revenue as exhibited in figure 59 below. Half of the respondents also predicted that their organization would survive for another six months without external support. While only 29% declared they would still survive for more than a year. Predictions about length of survival are displayed in figure 60.

Figure 59. Tourism Industry Revenue Loss during Covid-19

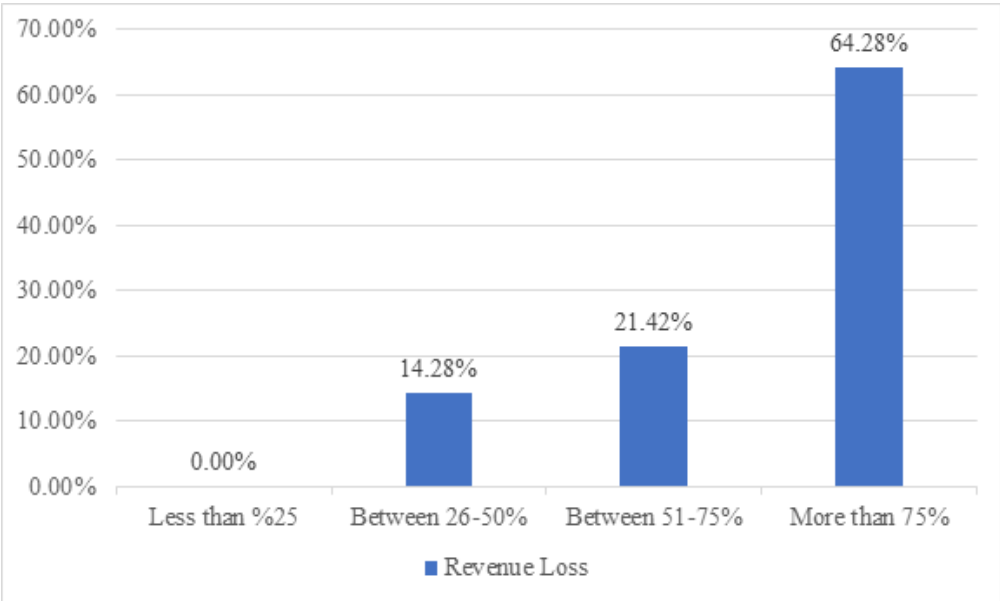


Figure 60. Covid-19 Survival without External Support

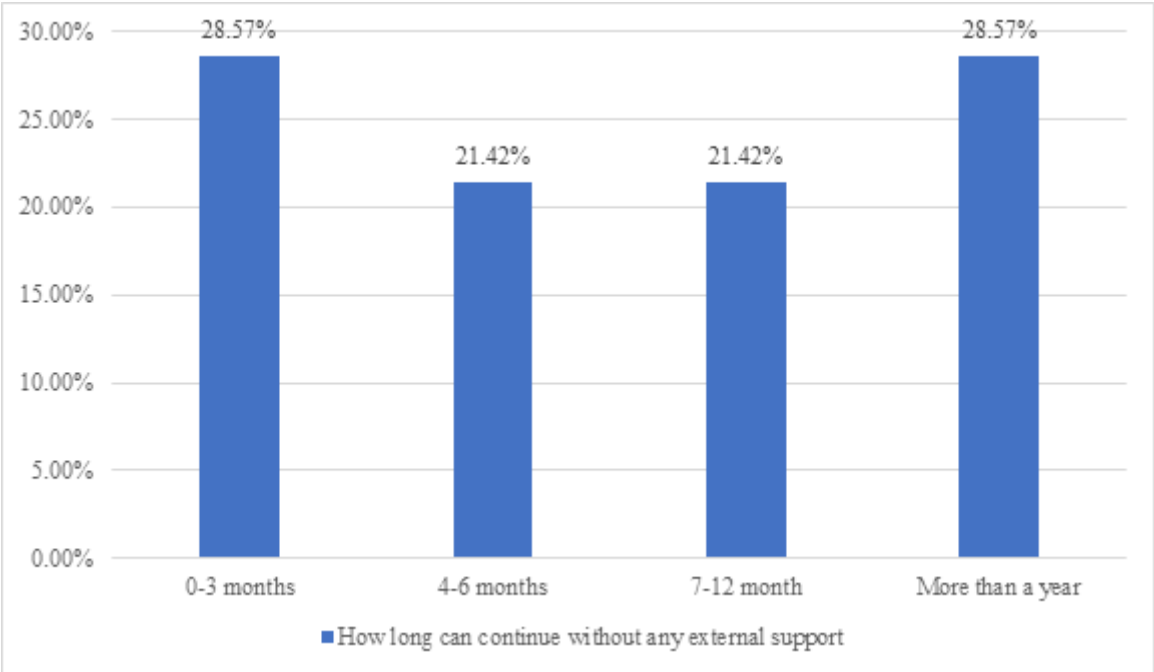
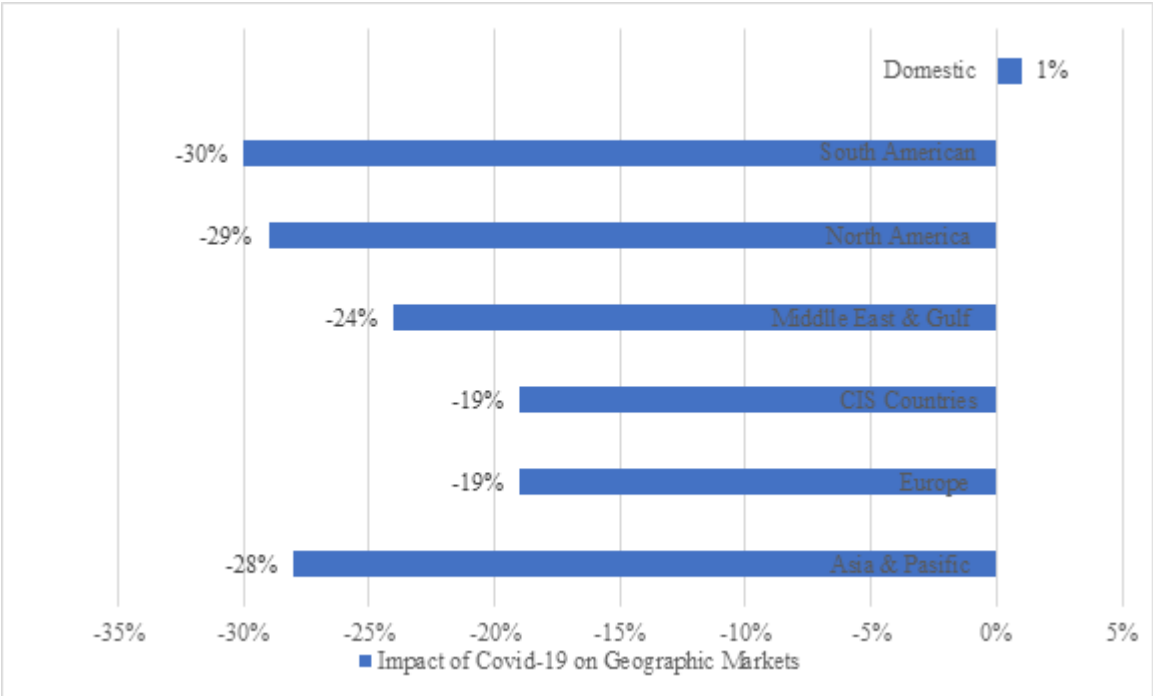


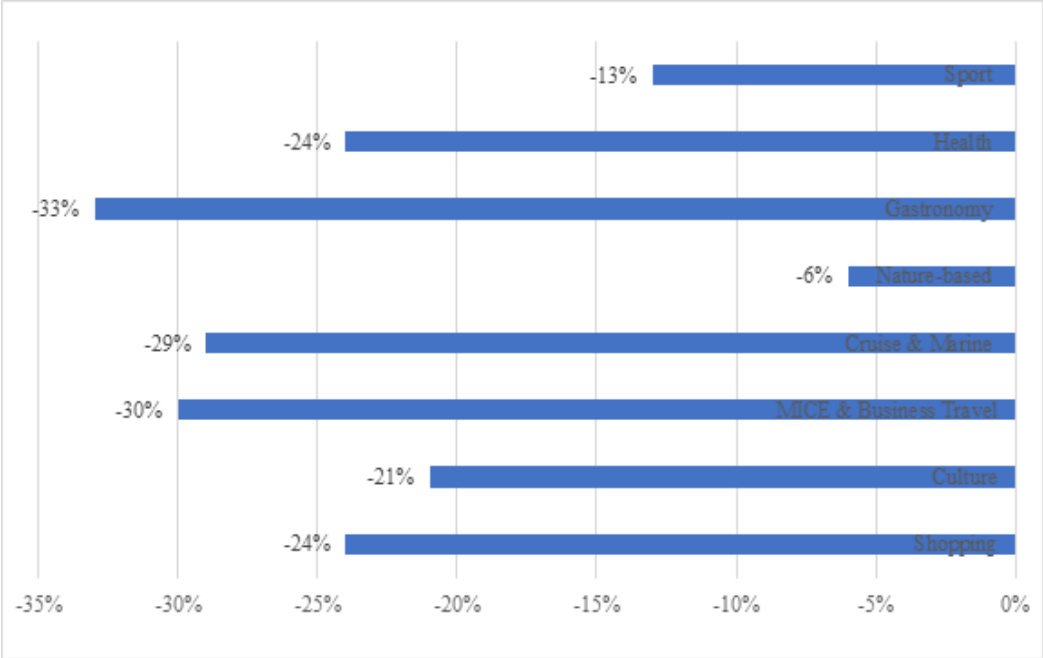
Figure 61 illustrates the transformations in different generating markets. As discussed above Domestic tourists are perceived to be most resilient to crises with a slight increase. CIS (-19%) and European (-19%) markets are also recognized as more resilient than Middle-East & Gulf (-24%), Asia-Pacific (-28%), North America (-29%) and South America (-30%).

Figure 61. Transformations in Generating Markets



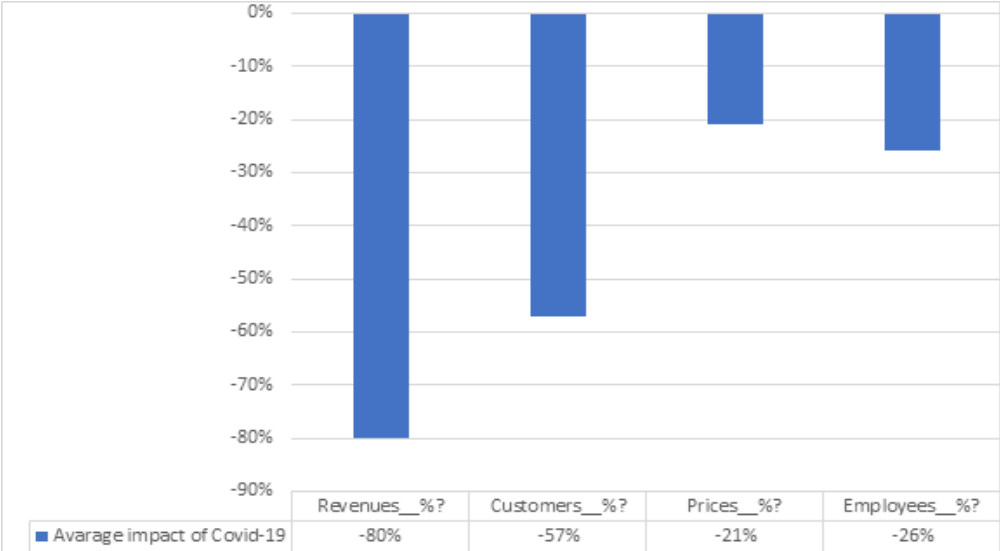
Nature based tourism (-6%) and Sport tourism (-13%) were listed as more resilient by Azeri tourism experts than Culture tourism (-21%), Health tourism (-24%), Shopping tourism (-24%), Cruise & Marine tourism (-29), MICE & Business Travel (-30%) and Gastronomy tourism (-33%). Transformations expected in tourist motivations are exhibited in figure 62.

Figure 62. Transformations in Tourism Types



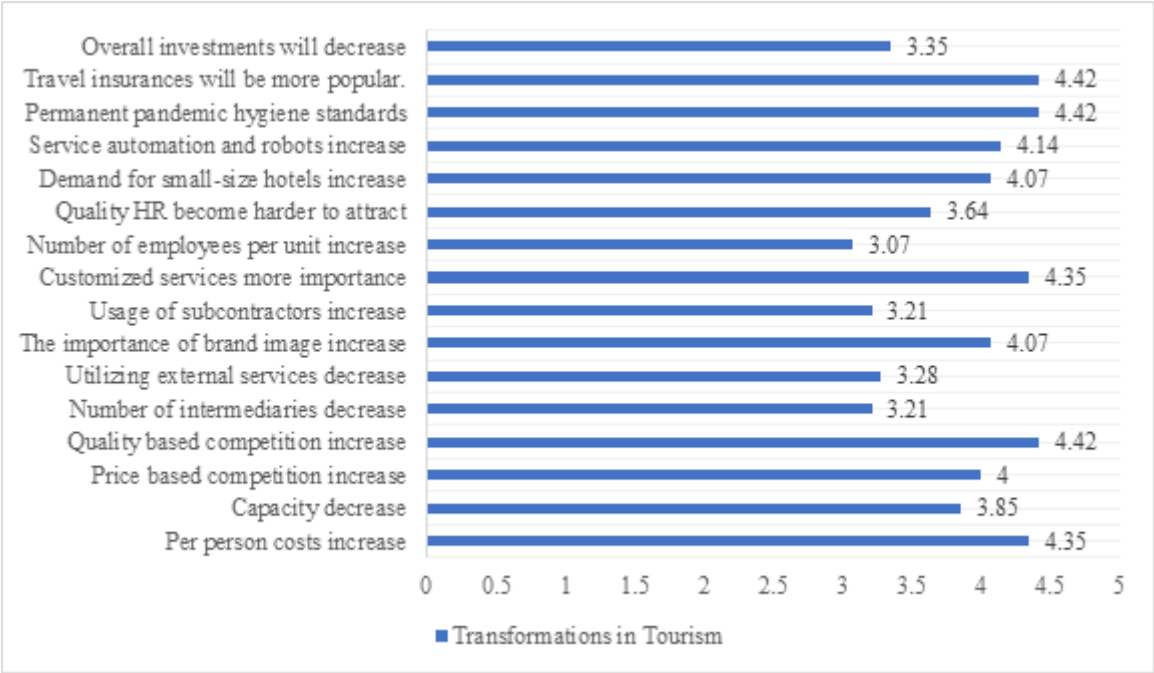
Detailed information on the impacts of Covid-19 on different performance indicators were also requested. Data as represented in figure 63 shows that revenues (-80%), number of customers (-57%), number of employees (-26%) and unit prices (-21%) have all declined.

Figure 63. Impact of Covid-19 on Performance



Industry experts were also enquired about the transformations happening in the industry amid Covid-19. Travel insurances becoming more popular because of the unpredictable border restrictions and quarantine measures (4.42), Pandemic hygiene standards becoming permanent expectations (4.42), Service quality standards becoming more important for competition (4.42), Customized services emerging as more significant and increase in per person costs as the main transformations expected amid Covid-19. Other transformations expected are listed below in figure 64.

Figure 64. Transformations in Tourism amid Covid-19

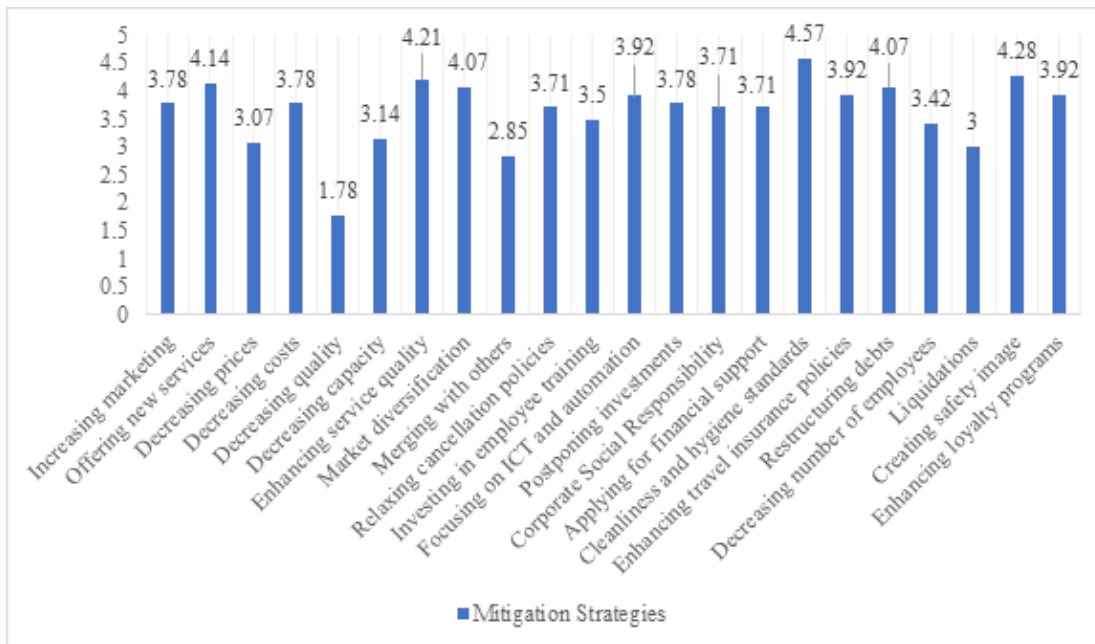


iii. Mitigation of Covid-19

1. Industry Strategies

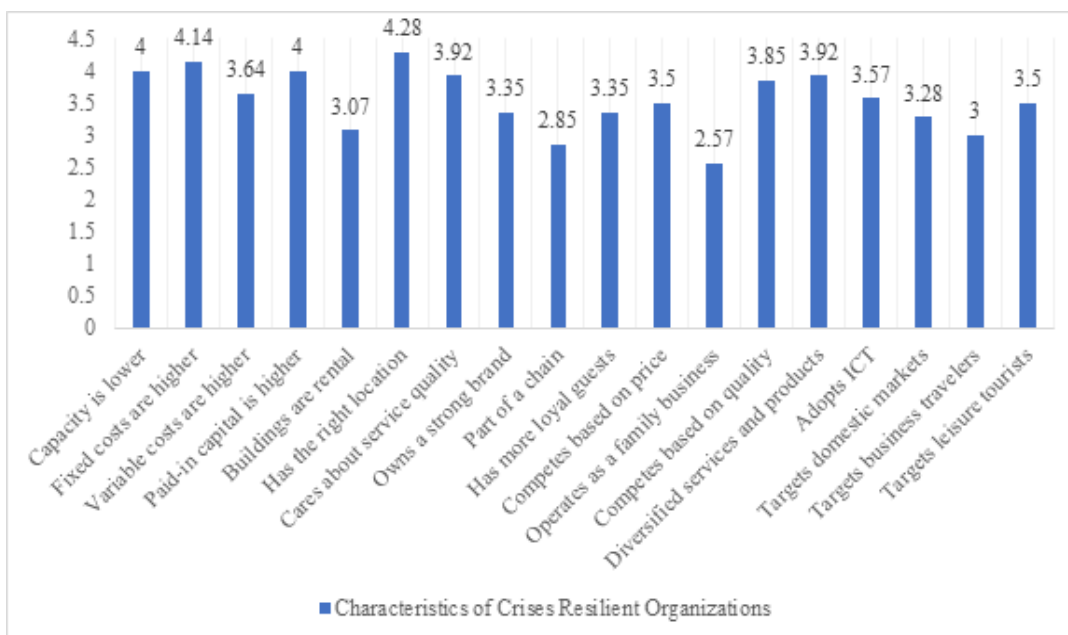
Various industry strategies identified during literature review and qualitative research were also rated by industry representatives in Azerbaijan. Enhancing Cleanliness and Hygiene standards (4.57), Creating safety image (4.28), Enhancing service quality (4.21), Offering new services (4.14), Market diversification (4.07) and Restructuring debts were mentioned as most important mitigation strategies adopted by Azerbaijan tourism industry. These are detailed in figure 65 below.

Figure 65. Private Sector Strategies.



Tourism industry experts were also asked about the characteristics of crisis resilient tourism organizations. Based on their feedback, Organizations with the right location (4.28), High fixed costs (4.14), Lower capacity (4), higher paid in capital (4), Offering quality service (3.92) and with Diverse products and services are more immune to Covid-19. These perspectives are explored in figure 66 below.

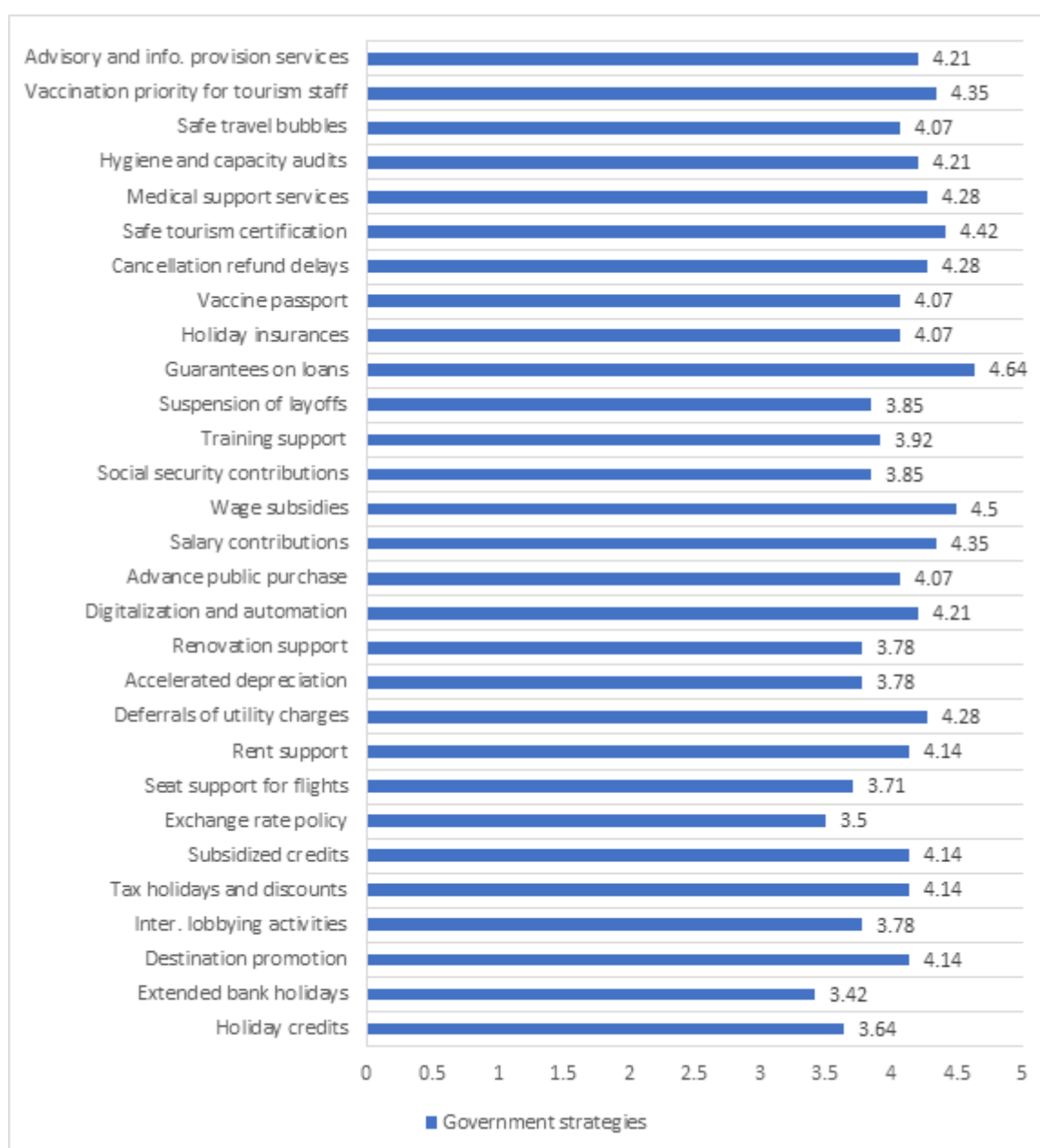
Figure 66. Characteristics of Covid-19 Resilient Tourism Organizations.



2. Government Strategies

Most Covid-19 government support in Azerbaijan is generic, offered to all sectors without differentiation to the tourism industry. These include employment protection programs, tax discounts, deferrals, and postponements, credit facilities, investment incentives, public procurement facilities, demand generation measures, import substitution programs and supporting health services. Concerning tourism, the Government introduced the Sahman (Sanitation and Hygiene Methods and Norms) program and set-up various quarantine measures and border restrictions.

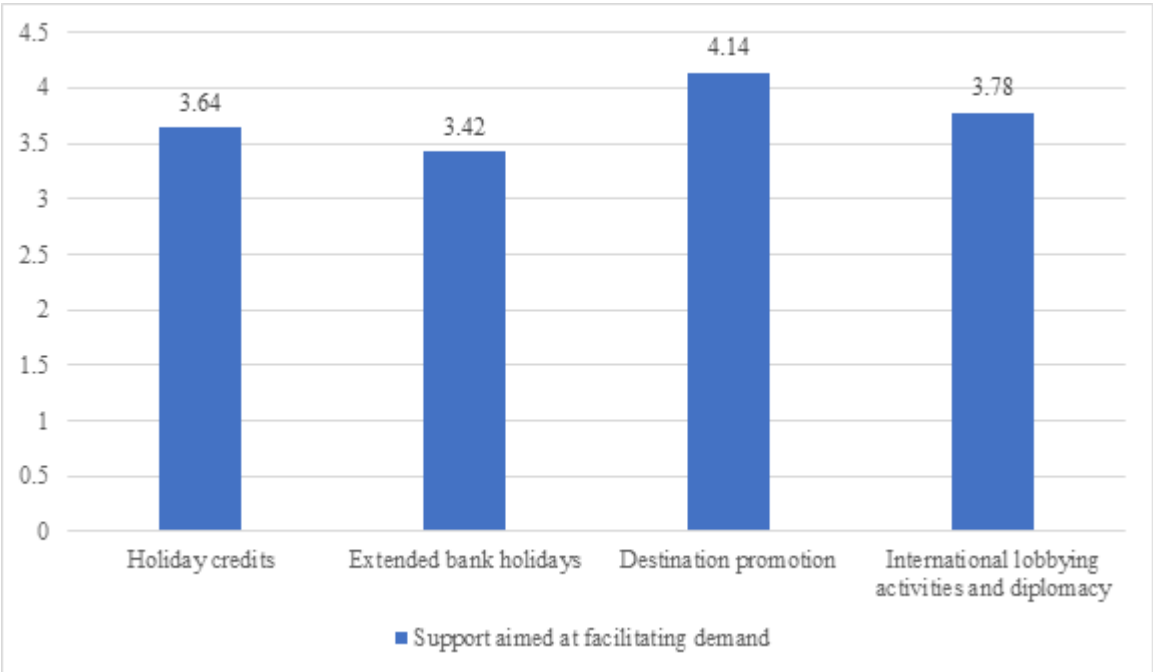
Figure 67. Government Mitigation Strategies



Industry experts in Azerbaijan also rated the importance of government Covid-19 mitigation strategies. Informed by their responses figure 67 exhibits the ratings of each alternative government support. Overall, Government guarantees on loans (4.64), Wage subsidies (4.5), Safe tourism certification (4.42), Salary contributions (4.35), Deferrals of Utility Charges (4.28), Cancellation refund delays (4.28) and Medical support services were identified as most important government mitigation strategies.

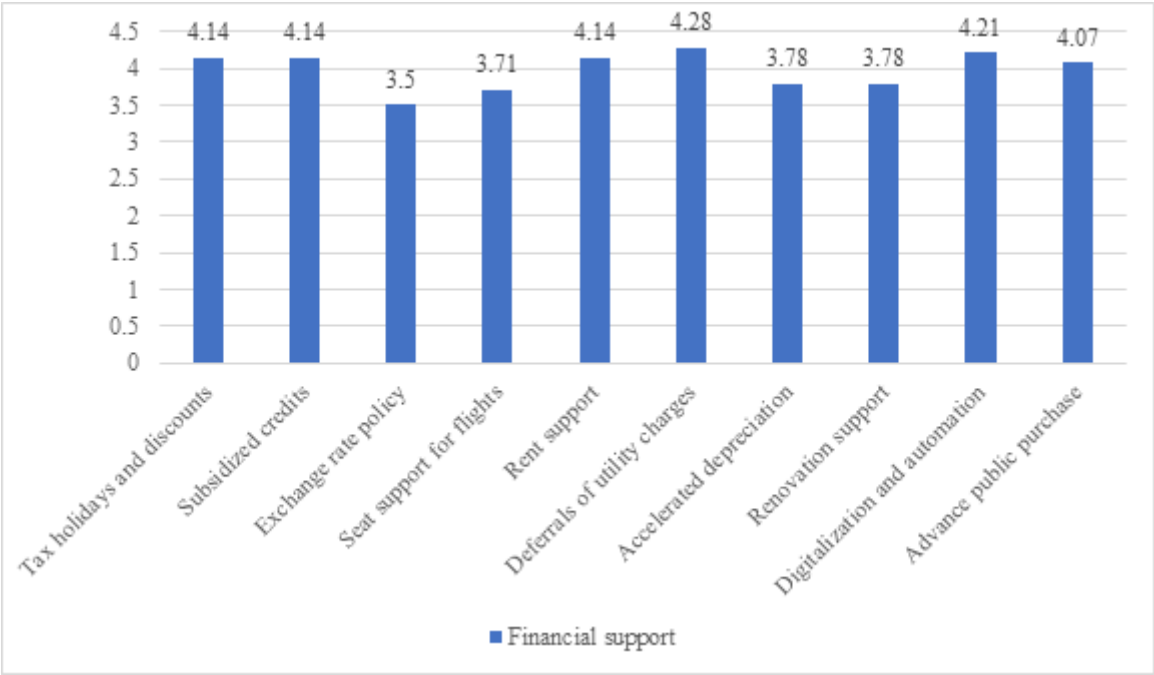
Government mitigation strategies were also grouped under four main groups as; Activities for enhancing demand, Financial support, Support for maintaining and training workforce, Legislative actions, and operational Processes. Activities targeted to enhance demand are such actions that aim to facilitate demand such as Destination promotion (4.14), International lobbying and diplomacy (3.78), Holiday credits (3.64) and Extended holidays (3.42) to increase local demand. These are exhibited below.

Figure 68. Government Activities for Enhancing Demand



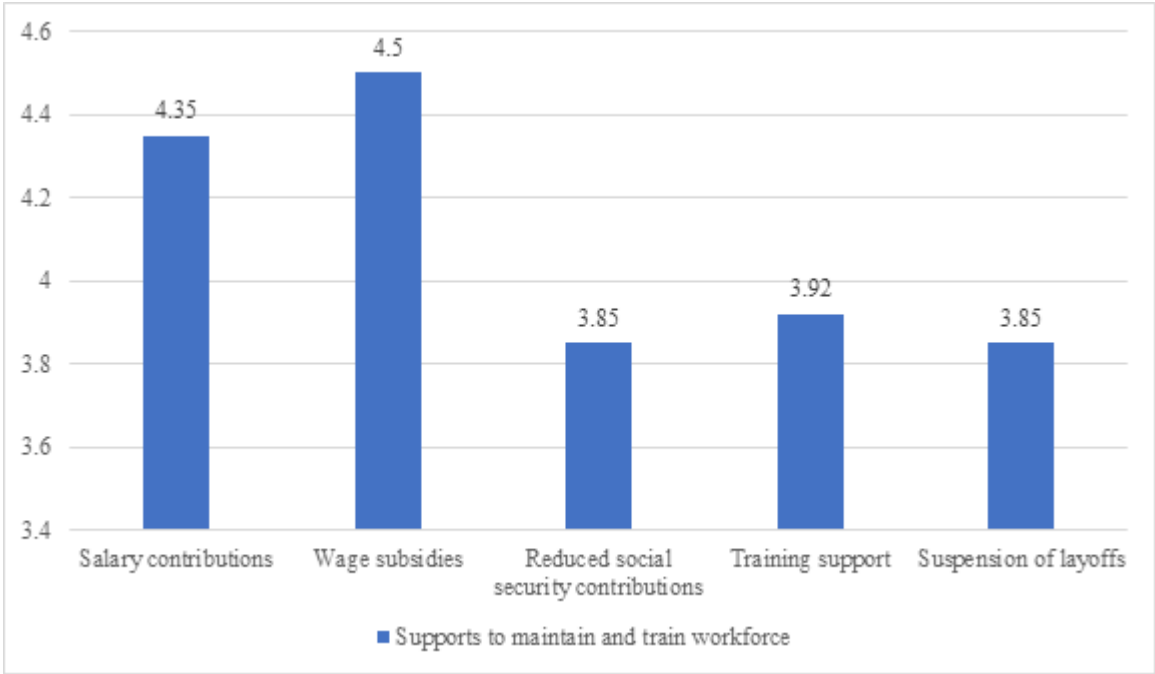
Financial support and aids those intend to help cash flow were also among the most important government mitigation activities and included Deferrals of utility charges (4.28), Support for digitalization and automation (4.21), Tax holidays and discounts (4.14), Subsidized credits (4.14) and Rent support (4.14) among others as detailed in figure 69 below.

Figure 69. Government Financial Support



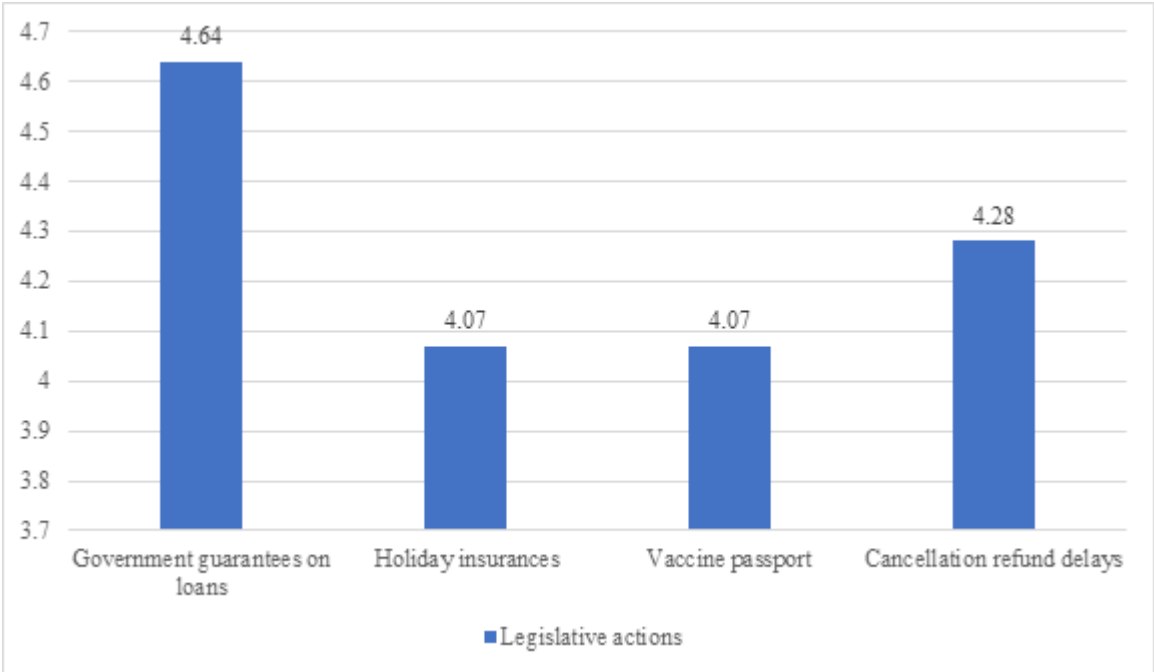
The human intensive nature of the tourism industry is also reflected in the responses of industry stakeholders in Azerbaijan. Particularly Wage support (4.5) and Salary contributions (4.35) were rated among most important government subventions. Training support (3.92), Reduced social security contributions (3.85) and Suspension of layoffs (3.85) were also rated important (see figure 70).

Figure 70. Supports to Maintain and Train Workforce



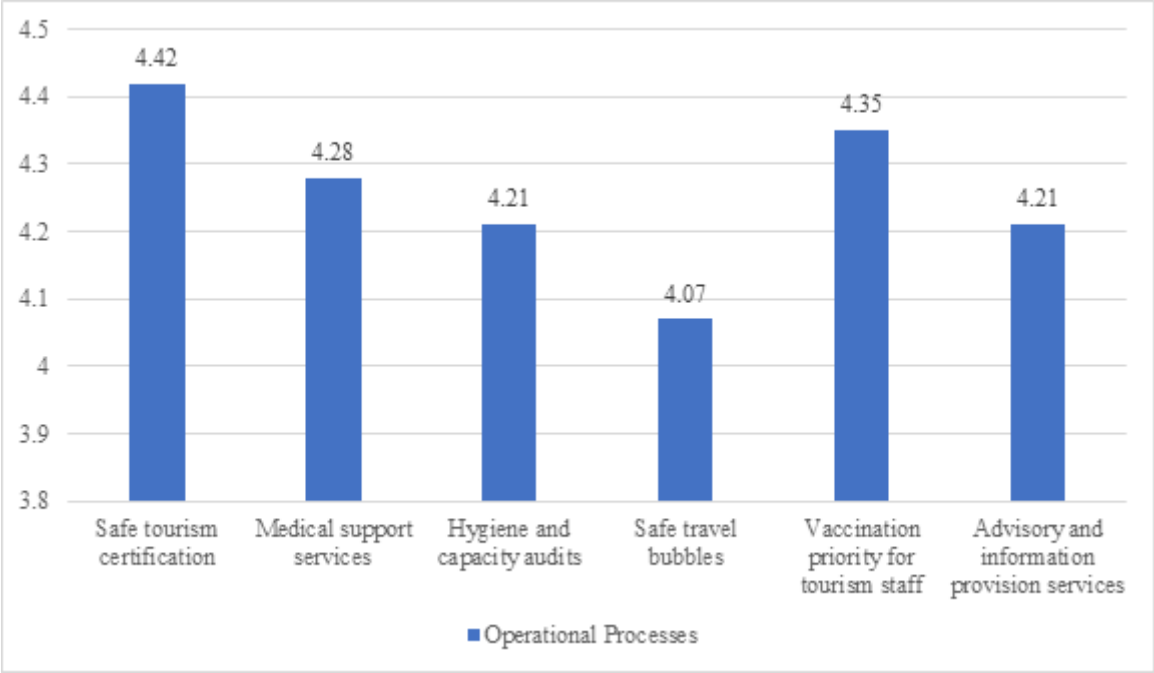
Various exceptional and short-term legislative actions were also listed as important government mitigation strategies targeting to protect the tourism industry. Azerbaijan tourism experts rated Government Guarantees on loans (4.64), Cancellation refund delays (4.28), Introducing holiday insurances (4.07) and vaccine passports (4.07) as important survival strategies as displayed in figure 71.

Figure 71. Legislative Actions Protecting Tourism Industry



Various operational processes organized by the government were also listed among key mitigation measures. As exhibited in figure 72, these are Safe Tourism certification called Sahman in Azerbaijan (4.42), Vaccination priority for tourism staff (4.35), Medical support services (4.28), Hygiene and Capacity Audits (4.21), Advisory services and information provision by the government authorities (4.21) and Safe travel bubbles (4.07).

Figure 72. Operational Processes



iv. Policy Recommendations

During the qualitative data collection, experts confirmed normalization as the most important strategy. They see mobility restrictions as the main obstacle towards normalization.

Domestic tourism has been the leading tourism segment in the recovery process in Azerbaijan. Despite the indicators showing a gradual increase in incoming tourism, domestic tourism almost tripled in 2021. Rahmanov (2020) also discusses that Azerbaijan citizens tend to holiday within the country rather than going on holiday abroad. They also stated Azerbaijan citizens prefer to travel using their own vehicles (60%) rather than join a package tour. Considering most domestic travelers prefer to use their own vehicles, the motorway infrastructure and quality also emerge as an important facilitator. Domestic tourism in Azerbaijan also seems to be very sensitive to risks associated with Covid-19, therefore tour group capacities should be decreased to present lower risks of smaller groups.

Considering the Covid-19 risks involved with mass tourism, and untapped potential of natural resources in Azerbaijan, nature based tourism, eco-tourism and green tourism emerge as important strategies.

The safe tourism certificate (Sahman) also presents important implications for decreasing the risk of virus spread in tourism and providing confidence for tourists. Yet, auditing these safety rules are as important as setting up these standards.

Relaxing cancellation procedures are also important as travelers refrain from making plans because of the unpredictable environment (lockdowns, travel restrictions) created by the pandemic.

One major threat for tourism development in Azerbaijan is the quality of human resources. However tourism policy makers are aware of this deficiency and investing in tourism education and development of human resources in tourism.

Tourism in Azerbaijan is dependent on a few generating countries such as Russia, Georgia, Turkey and Iran. Considering major global source markets in Europe, Asia Pacific and Americas this shows a large potential in diversification.

d. Case Country- Jordan

i. History of Tourism Development

Jordan represents a key case-study destination that is fundamental to the study of tourism and crises. As a small country with cultural heritage sites of significant importance, Jordan is often described as being an oasis of stability in the turbulent region of the Middle East. Jordan's geopolitical position close to countries such as Israel, Syria and Iraq has often had negative spillover effects on tourism. However, as will be illustrated throughout this case study, the crises originated from various political tensions in the regions appear to have helped tourism and hospitality business owners and destination managers develop resilience against crises. Yet, the current pandemic has been a key challenge that has reshaped the whole tourism industry, affecting tourism, one of Jordan's major sources of foreign currency and employment.

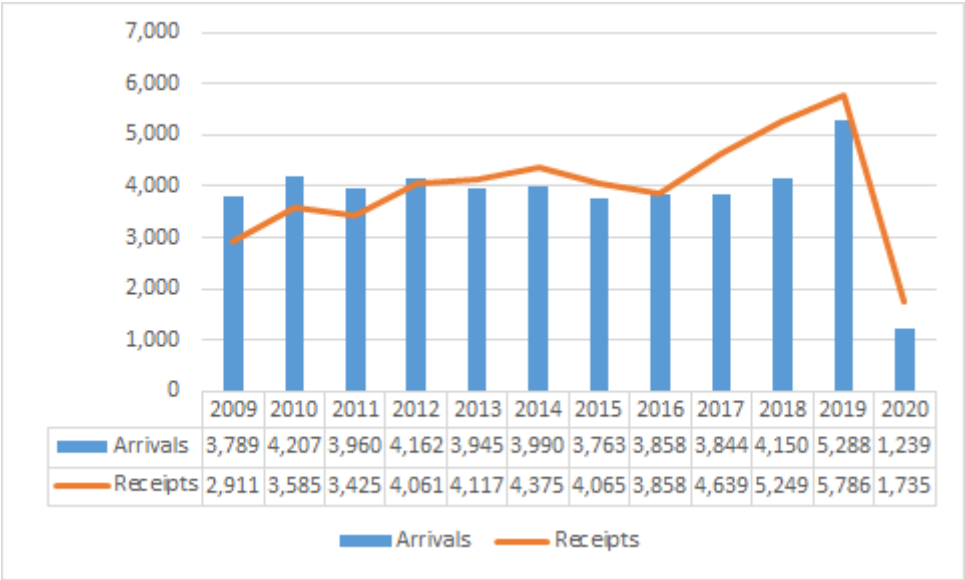
Tourism in Jordan has gained momentum from the 1990s onwards. The Jordanian–Israeli peace treaty of 1994 has been a milestone in the history of tourism in Jordan since it facilitated both foreign investments and enhanced Jordan's image as a peaceful country in the Middle East. Notably, Jordan government's interest in tourism development was limited before 1994 given the instability in the region (e.g., the Gulf Wars) and the lack of resources.

Following the peace treaty, there have been serious efforts to harness the power of tourism as a development tool. Unsurprisingly, it is only then that tourism has gained momentum as an attractive study major in both public and private higher education institutions with programs including tourism management and heritage preservation attracting larger numbers of students (Alrawadieh & Alrawadieh, 2015).

Following the peace treaty in 1994, international travel demand to Jordan dramatically increased by over 62% between 1993 and 1998. The growth in demand was possible by lifting mobility restrictions across borders with Israel. This has also enabled promoting and selling tour packages combining different destinations including Jerusalem and Petra. It should be noted that the growth in tourism demand due to the peace treaty with Israel brought limited economic benefits due to the prevalence of one-day excursionists in favour of stay tourists. Despite that, tourism contributed to Jordan's national economy becoming the larger export sector and the second largest private sector in terms of job creation and foreign exchange earnings in 2003, contributing over 800 million dollars to the Jordanian economy, which corresponded to around 10% of GDP (Alrawadieh, 2009). In 2019 the total contribution of tourism to GDP was 16%. Tourism also created 19% of employment (WTTC 2021b). Before the outbreak of Covid-19, Jordan tourism receipts reached 6,864 million US dollars increasing from 935 million US dollars in 2000 to 6,864 million US dollars in 2019 at an average annual rate of around 12% (WDA, 2020).

As shown in figure 73, tourism volume in Jordan has experienced a significant increase in the number of arrivals over the past two decades. The number of arrivals increased from only 3.7 million international arrivals in 1995 to over 8 million in 2010. While Jordan's tourism reached its peak in 2010, the following six years have witnessed a consistent decline with tourism volume registering only 4.2 million in 2016. This decline is attributed to different factors with the Syrian crisis on the northern borders of Jordan playing a salient role. Although tourism arrivals increased from 2016 onwards, the outbreak of Covid-19 has caused a sharp decline in tourism demand.

Figure 73. Jordan's Tourism Volume between 2000-2019



Source: World Development Indicators (WDI).

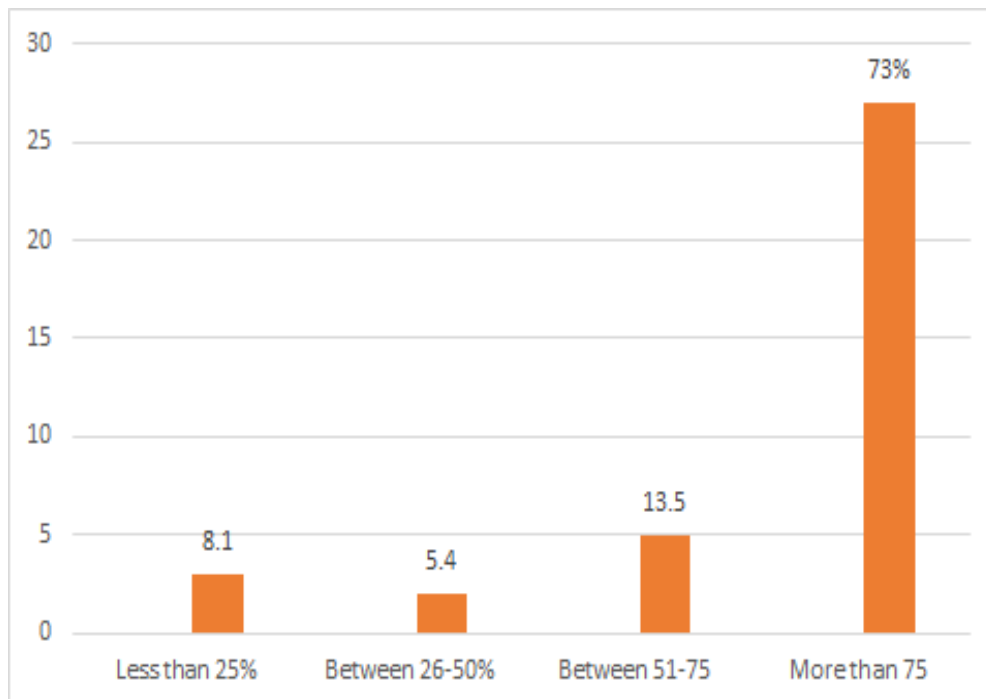
Similar to other destinations in the Middle East, Jordan has been affected by regional and national crises that have had direct impacts on its economy with tourism being among the most harmed sectors. These crises include the Gulf Wars, the Israeli-Palestinian conflict (wars on Gaza in particular), and terror attacks (e.g., The 2005 Amman bombings targeting hotels). The Israeli-Palestinian conflict(s) have often resulted in reduced tourism demand to Jordan, as noted by Beirman (2002, 174), “the media coverage of Israel's problems as a 'Middle East Crisis' has created a significant if unjustified 'fear factor' among potential Western tourists to Jordan”. Overall, these national regional crises have often caused sharp decline in tourism demand to Jordan given international travelers’ sensitivity to safety concerns when choosing destinations.

Despite the increasing tourism demand to Jordan during the past decade, the tourism sector in Jordan has yet to achieve its potential given the diversity and richness of the existing tourism resources as well as other advantages it has compared to rival destinations in the Middle East such as Israel and Egypt. Prior to the pandemic, in 2019, Jordan hosted over 5.3 million tourists (MoTA, 2019), yet the Covid-19 resulted in a sharp decline of around 77% in 2020 (MoTA, 2019). The following sections will discuss the volume and impact of Covid-19 on the tourism and hospitality industry in Jordan and represent findings from survey data collected from 37 respondents in Jordan (19 hotels, 9 travel Agencies, 6 restaurants, and 3 others (e.g., souvenirs shops)).

ii. Impacts of Covid-19

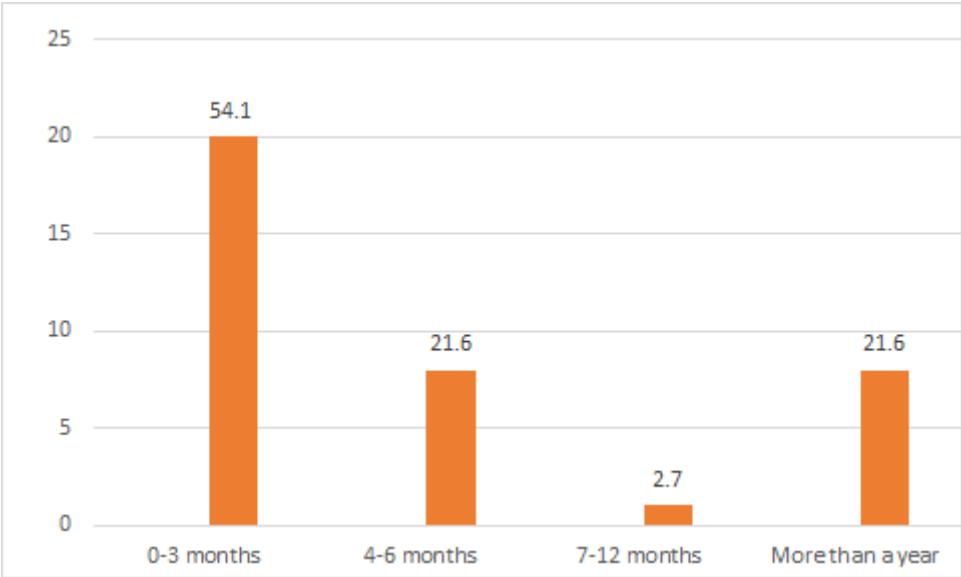
Jordan's heavy reliance on tourism as a key source of foreign currency and a core contributor to job creation has resulted in greater harmful impacts of the Covid-19 pandemic. In line with the massive decline in the international travel demand due to travel restrictions and mobility bans, the number of arrivals to Jordan declined by around 77% in 2020 compared to 2019 (MoTA, 2020) resulting in around 81% decline in tourism receipts. By earlier 2020, the loss in Jordanian tourism market reached 4.7 billion US dollar, with over 800 F&B businesses collapsing and around 14 thousands employees losing their jobs in touristic F&B businesses (Tourism Daily News, 2020). The travel industry has also been severely hit by the crisis with over 60% of Jordanian travel agencies being forced to close. Based on the empirical data collected between July and Aug. 2021 from 37 tourism executives operating in Jordan 27 of the respondents experienced a more than 75% decrease in revenues.

Figure 74. Jordan's Tourism Industry Revenue Loss during Covid-19



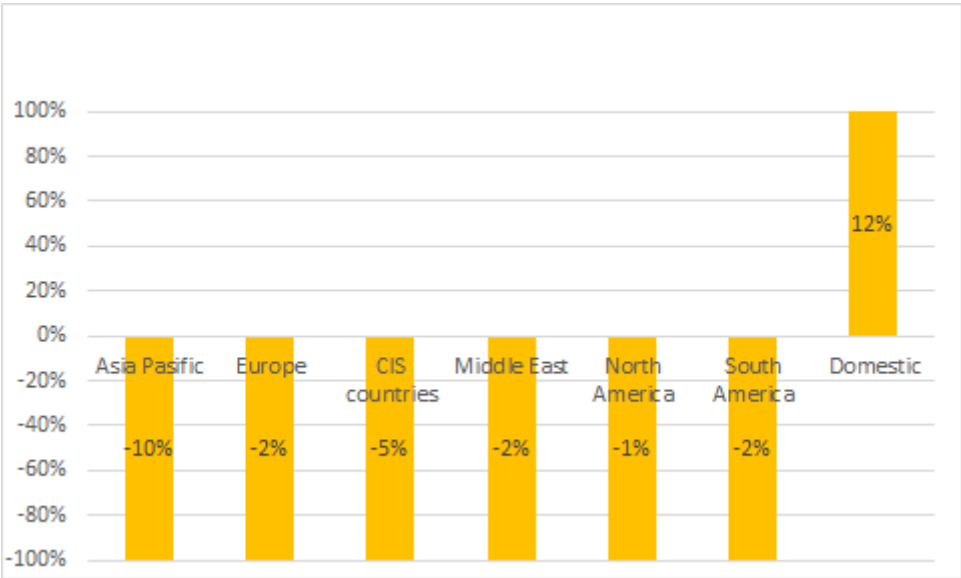
When Jordanian tourism industry representatives were asked about the duration they would survive without any additional support, over 54% of the respondents predicted they could continue their operations for less than 3 months without any external support. Surprisingly, Jordanian tourism industry representatives seem to be more optimistic with over 21% estimating they would still survive if the pandemic continues for another year. Overall, respondents estimate they would survive for an average of 5.7 months.

Figure 75. Survival without External Support (Months)



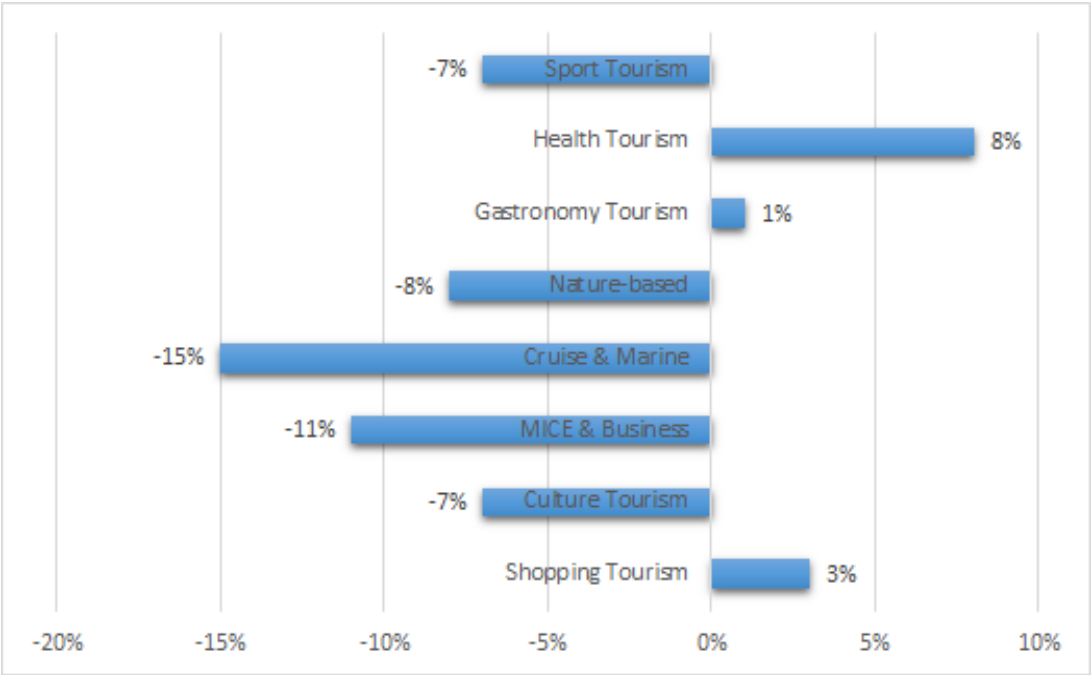
Respondents were also surveyed about their perceptions of the state of the demand from different geographic markets. Except for domestic tourism, all markets have declined with Asia & Pacific being identified at the top of most declined markets (-10%) followed by CIS Countries (-5%). Interestingly, however, respondents estimated a growth of 12% in domestic tourism demand amid Covid-19 (see figure 76). Travel Inside your Country, offering special prices and discounts at nature reserves designed by the government was one of the tools to facilitate local demand.

Figure 76. Impact of Covid-19 on Geographic Markets



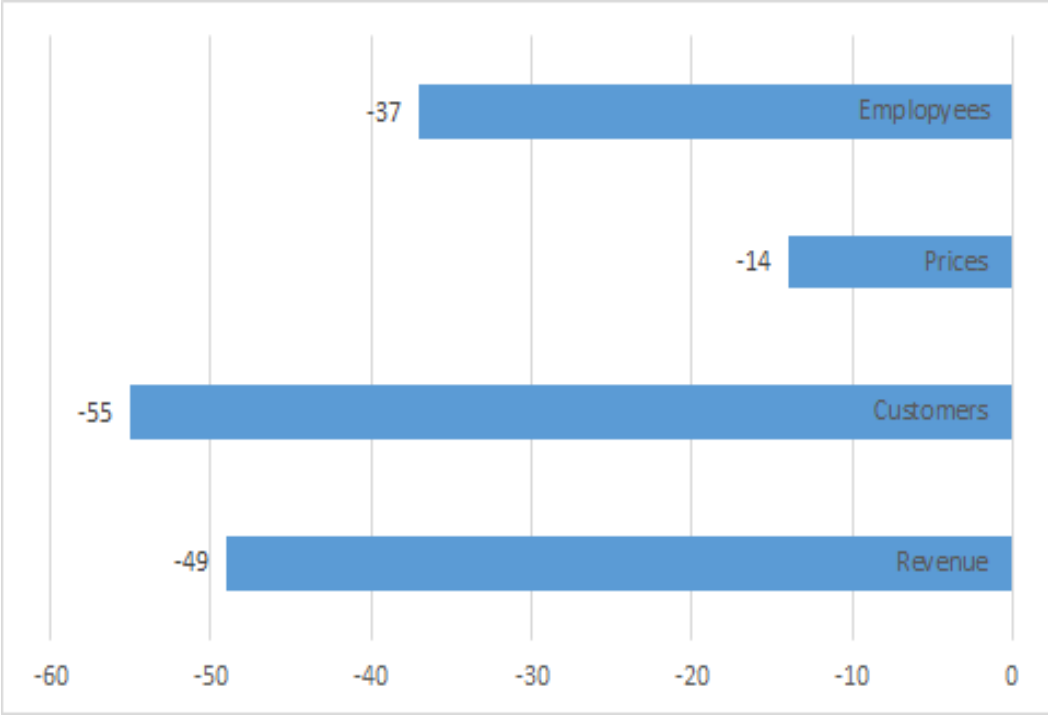
As shown in figure 77, respondents perceive health tourism, shopping tourism, and gastronomy tourism as being the most resilient tourism types as they seem to have experienced no decline but even witnessed some growth. Understandably, Cruise and marine tourism (-15%) and MIC & Business (-11%) were identified as the less resilient tourism types amid the crisis.

Figure 77. Impact of Covid-19 on Tourism Types (%)



Based on Jordanian tourism experts’ opinions, the business performance indicators show a major decline in both revenues (-49%) and customers (-55%). These are in line with the 77% decrease in tourist volume in 2020. Covid-19 also had a considerable negative impact on average prices (-14%) and number of employees (-37%). Fortunately both prices and employment stayed strong compared to the decline in volume and revenues.

Figure 78. Impact of Covid-19 on Performance Indicators

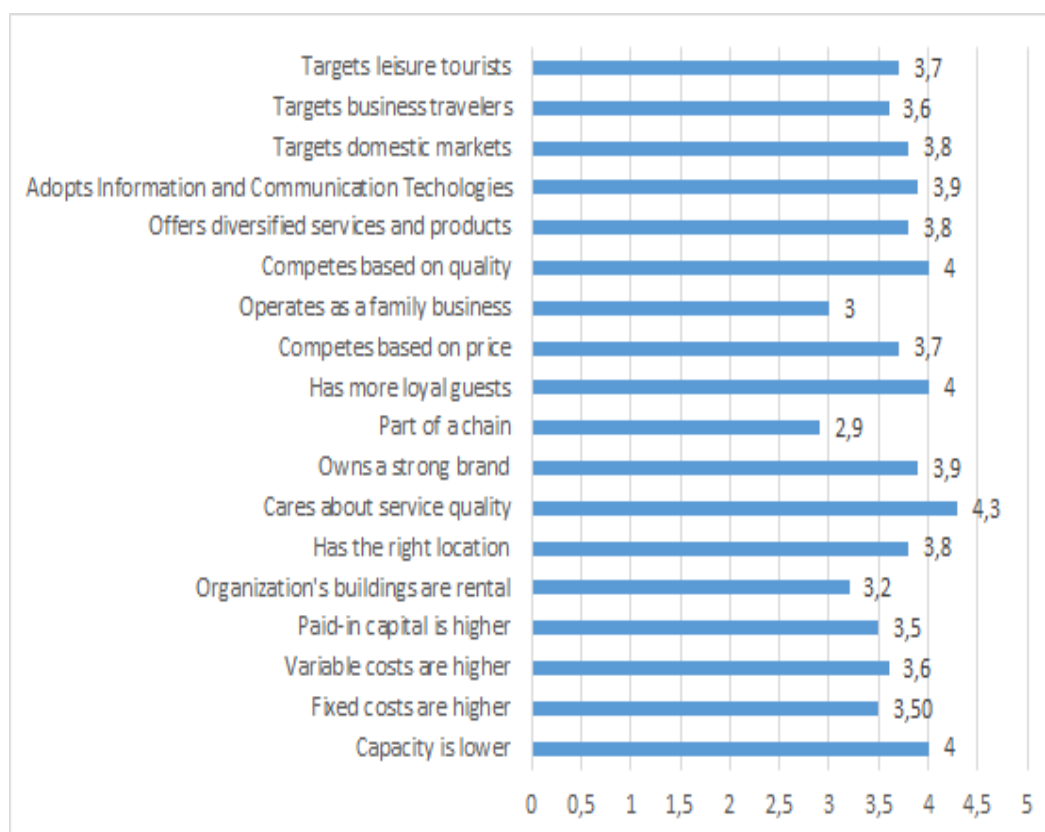


iii. Mitigation of Covid-19

1. Industry Strategies

As discussed earlier through this report, tourism practitioners have relied on different survival strategies in order to adapt to Covid-19 and the transformations that are brought by it. Following a review of literature and qualitative interviews with industry representatives, these strategies were listed and rated during the quantitative stage. Industry representatives were first invited to rate a set of characteristics describing crisis resilient organizations. Organizations that care about service quality (4.3), have low capacity (4.0), have more loyal customers (4.0), utilize information and communication technologies (3,9), compete based on quality than price (4.0) were identified as most resilient to crises. Interestingly, respondents rated being a part of a chain (2.9) as the least important characteristic of crisis resilient organizations. These are displayed in figure 79 below.

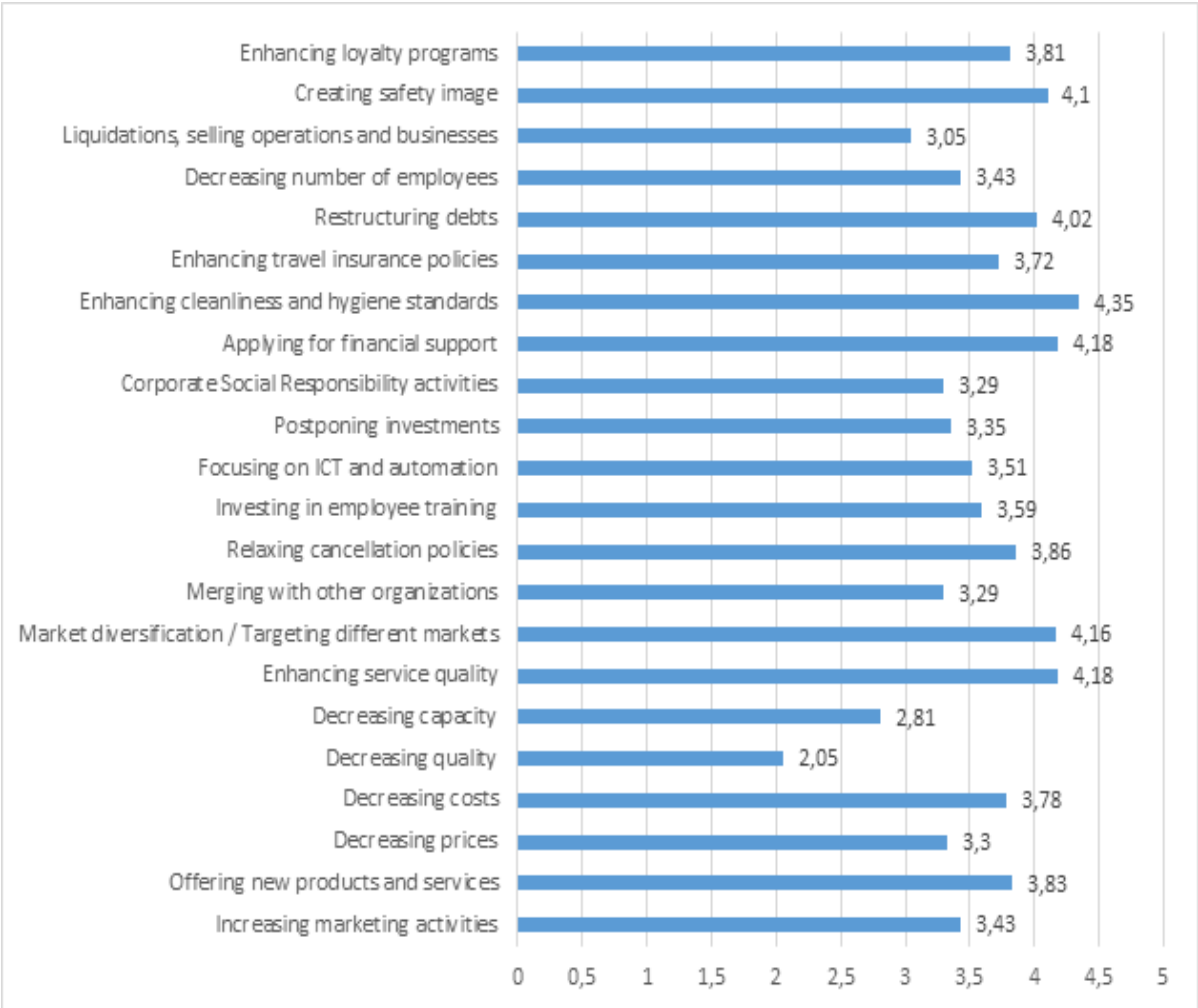
Figure 79. Characteristics of Crises Resilient Organizations



Based on data collected (see figure 80 below), upgrading cleanliness and hygiene standards (4.35), enhancing service quality (4.18), applying for financial support (4,18), market diversification (4.16), and restructuring debts (4.02) were rated as the most effective mitigation strategies. However, decreasing quality (2.05), decreasing capacity (2.81), and liquidations (3.05) were viewed as less popular strategies to cope with Covid-19.

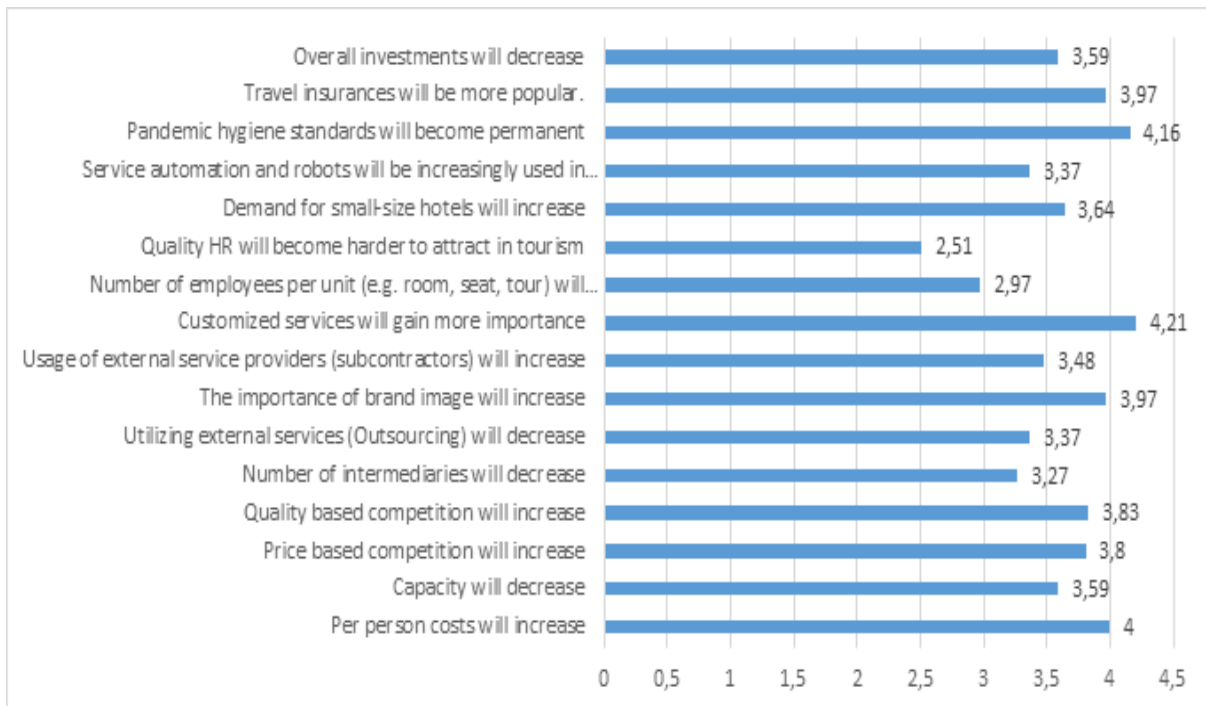
Applying for financial support and market diversification are also reflected in different tourism businesses joining Jordan's government-sponsored initiatives (e.g., Jannah) to harness the power of domestic tourism as one path to recovery especially for travel trade businesses (e.g., tour operators). This also has helped local businesses providers in key Jordan's destinations such as Petra and Aqaba survive.

Figure 80. Jordan’s tourism industry mitigation strategies.



Finally, tourism experts were enquired about their perceptions of the potential transformations in the industry after Covid-19. There seems to be a consensus that customized services will be more important than standard mass package products (4.21) and that pandemic hygiene standards will become permanent after Covid-19 (4.16). Increasing per person costs (4.00), the importance of brand image (3.97), and the popularity of travel insurance systems (3.97) were also viewed as key potential transformations in the post-pandemic era. Respondents were reluctant to agree with the notion that quality HR would be harder to attract in tourism (2.51) and that the number of employees per unit (e.g. room, seat, tour) will increase (2.97) (see Figure 81).

Figure 81. Transformations in Jordan’s Tourism after Covid-19



2. Government Strategies

Jordan’s first tough measures to curb the increase of Covid-19 confirmed cases began on 17 March 2020 with the enacting of the National Defence Law. This involved banning mobility and almost complete lockdown orders. Despite relaxing these measures over different periods, the second and third wave of the pandemic brought back even more tough measures putting more pressure on Jordan’s already fragile economy. These measures have had devastating effects on the tourism and hospitality industry. To reduce these impacts, the government has taken some measures, a great part of which aimed to help the private sector survive the crisis.

As many countries over the world and similar to the other case studies reported in the current study, major part of Jordan’s mitigation strategies to help tourism businesses cope with the crisis have generally taken the form of generic support targeting various sectors without nuanced treatment of the key characteristics of tourism and hospitality services. This generic support included offering credit facilities, employment support, safe tourism certifications, promotional activities and legislative actions. The importance of these actions were also assessed by the 37 tourism industry experts in Jordan. These strategies were grouped under five key categories, namely; Demand Facilitators, Financial Support, Employment Support, Legislative Actions, and Operational Processes.

Figure 82. Government Mitigation Strategies



As shown in the figure 82 above, the government's strategies seem to have evolved around providing subsidized credits (4.54), deferrals of utility charges (4.51), advisory and information provision services (4.48), and holiday insurances (4.48). On the other side, government guarantees on loans (3.43) and destination promotion (3.56) were rated low indicating that these strategies were viewed as less effective in combating the negative impacts of Covid-19 on Jordan's tourism industry.

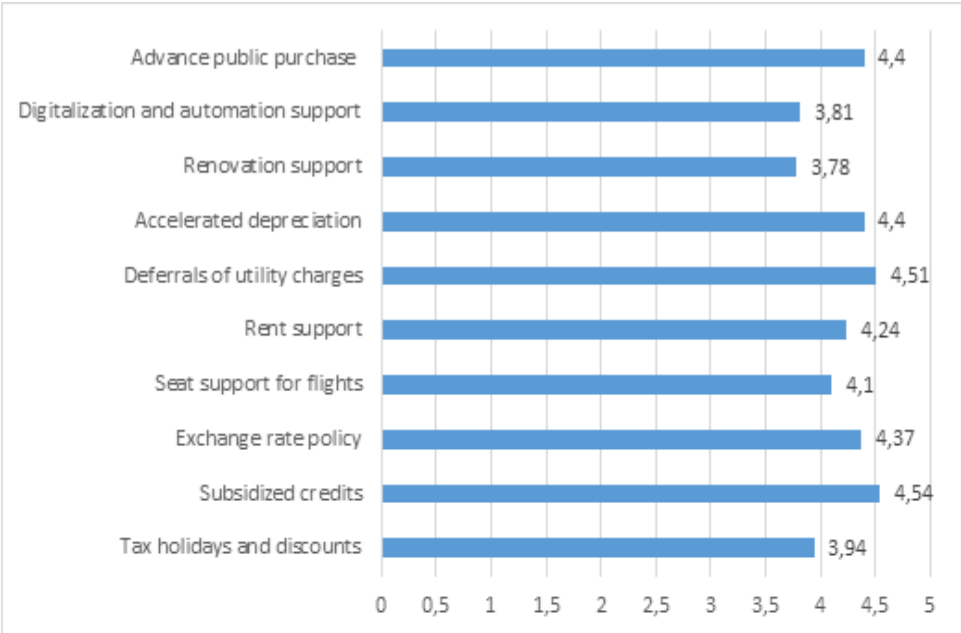
Destination efforts oriented toward facilitating tourist demand during the Covid-19 composed of strategies targeting destination marketing and fostering domestic tourism. International lobbying activities and diplomacy (4.21), holiday credits and vouchers for residents (3.81), extended bank holidays for enhancing local demand (3.78), and to a lesser extent, destination promotional activities (3.56) were viewed as important activities to induce demand.

Figure 83. Support aimed at facilitating demand



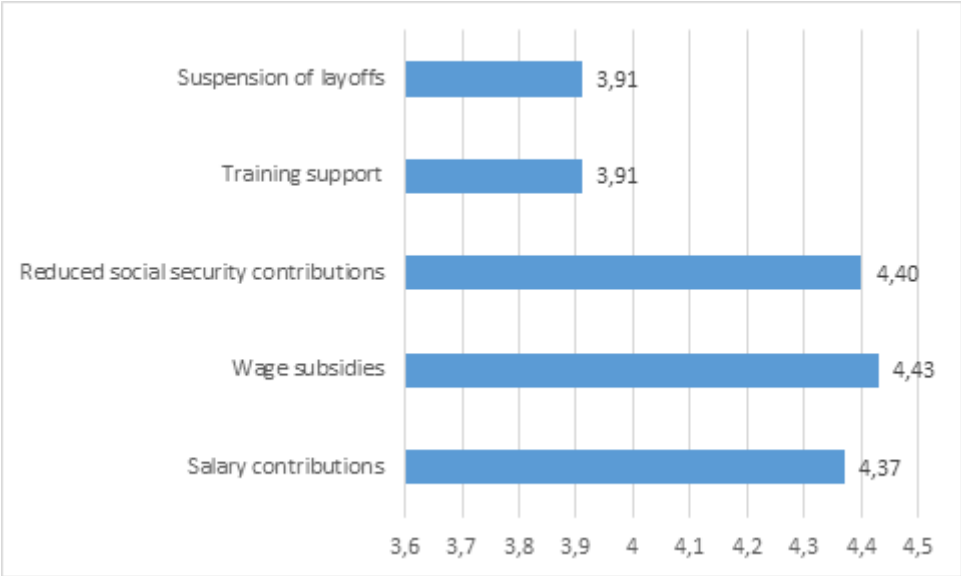
Among the key government strategies to mitigate the devastating impacts of Covid-19 on the tourism industry were associated with financial support. Our findings suggest that tourism industry representatives rated Subsidized Credits (4.54), Deferrals of Utility Charges (4.51), Exchange Rate Policy (4.37), and Rent Support (4.24), as being crucial financial support. Advance public purchase (4.4), accelerated depreciation (4.4), and seat support for flights (4.1) were also assessed as important elements (See figure 84 below).

Figure 84. Financial Support



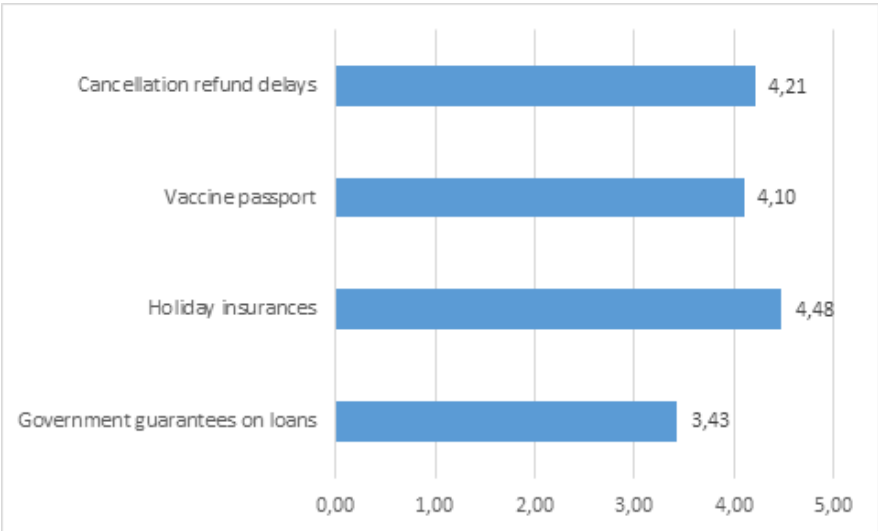
Support to maintain and train workforce during the crisis is one key category of government mitigation strategies. As shown in Figure 85, all supports oriented towards maintaining and training tourism HR were viewed as important by industry experts. This is not surprising given the nature of tourism as a human intensive industry. Wage Subsidies (4.43) received the highest rating among all other government support followed by Reduced Social Security Contributions (4.40), and Salary Contributions (4.37).

Figure 85. Supports to maintain and train workforce



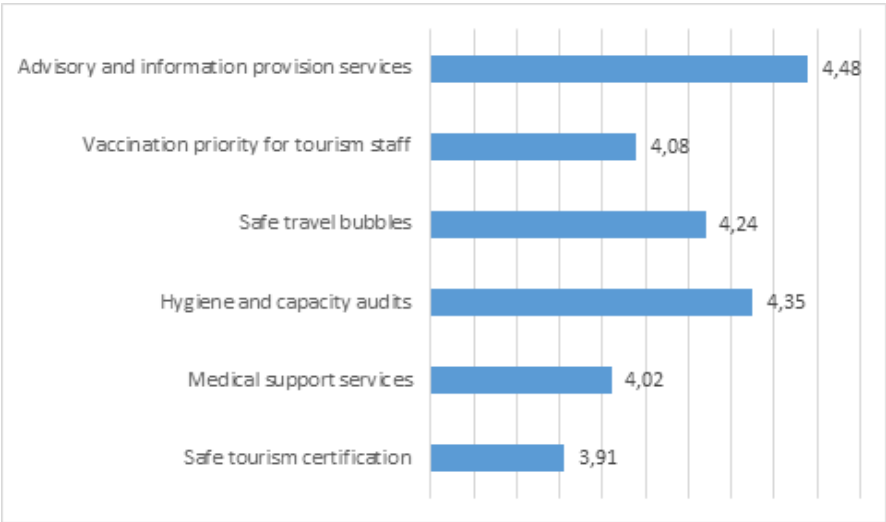
Like many countries in the world and similar to other OIC countries including Turkey and Malaysia, Jordan has introduced several legislative actions, regulations and standards with the aim of helping the industry survive the Covid-19 crises. Holiday Insurances (4,48), Cancellation Refund Delays (4,21), and Vaccine Passports (4,10) were highly rated by tourism experts as key legislative supports that have been effective during the crises.

Figure 86. Legislative Actions



Finally, Jordanian tourism experts were surveyed about a set of operational processes that were introduced and overseen by the government. As shown in figure 87, Advisory and Information Provision Services (4, 48), Hygiene and Capacity Audits (4,35), Safe Travel Bubbles (4,24), and vaccination priority for tourism staff were highly rated by respondents.

Figure 87. Operational Processes



iv. Policy Recommendations

It has become clear that tourism and hospitality businesses in Jordan have had greater harm as a result of the current Covid-19 pandemic. Loss in tourism receipts due to the sharply decreased tourism demand is parallel to several economies of other countries either developed or developing. However, what makes the economic costs of the pandemic even more salient in the tourism industry in Jordan is the country's heavy reliance on tourism as a core economic pillar. Tourism is considered Jordan's oil and has had considerable experience in dealing with crises due to geopolitical tensions in the Middle East. However, Jordan's tourism resilience to crises such as the current pandemic appears to be modest given the unprecedented global nature of Covid-19. Overall, the present case study has some policy recommendations that can help decision-makers develop a more resilient industry to address similar future challenges facing the tourism and hospitality industry.

In times of crises when international travel declines due to mobility bans and travel restrictions, domestic tourism should be encouraged as a tool to help local destinations and inherently tourism and hospitality businesses survive the crisis. Jordan seems to have been aware of the power of domestic tourism during the current crises with some programs such as "Jannah" [heaven], one of Jordan Ministry of Tourism's programs that are oriented toward encouraging domestic tourism. The importance and resilience of the domestic tourism market was also emphasized by industry representatives surveyed in this study. In fact, all travel markets have witnessed a decline ranging from 1% to 10%, industry experts estimated a growth of 12% in domestic tourism demand amid Covid-19. Domestic tourism should therefore be viewed as a path to survival during crises.

Jordanian tourism industry experts also mention service quality as a key strategy to mitigate the impacts of the current crisis. This raises the need for more efforts oriented towards employee training and human resources development. Market diversification was also frequently mentioned and rated as an important strategy by the industry representatives. Therefore, it is important to develop communication strategies targeting new markets. This should also be achieved by focusing on creating a safety image of Jordan.

Based on our survey's findings, Jordan's tourism experts highly rated government support in its various forms (e.g., financial, legislative, employment, operational measures and strategies to enhance demand). Support aimed at facilitating demand including international

lobbying activities and diplomacy were perceived as important. For instance, Jordan's current (August 2021) management of the crises has resulted in a favorable image in terms of safety. This is evidenced in the fact that Jordan is not listed in any red list of any country. Financial support has also been very effective in helping the tourism industry survive the crisis. In particular, subsidized credits and deferrals of charges have proved to be important during the crisis.

Support oriented towards maintaining and training the tourism workforce were also viewed as important by industry experts. Wage subsidies were appreciated as they helped businesses stay on feet when performance indicators (e.g., revenues, prices) fell down during lock-down and mobility restrictions. The government legislative actions including holiday insurances and cancellation refund delays were also essential. Finally, operational processes including advisory and information provision, and hygiene and capacity audits were highly rated by tourism experts. Overall, various types of support during the crisis were provided with Jordan's tourism experts generally attributing high importance to this support as a path to survival and recovery.

4. POLICY RECOMMENDATIONS FOR OIC DESTINATIONS

This final section will put together what is discussed in the previous sections combining findings of both primary and secondary data, elaborate on the overall impacts of Covid-19 in OIC, recovery strategies and creating a more crises resilient tourism industry in OIC. There will be separate policy recommendations for both public and private stakeholders.

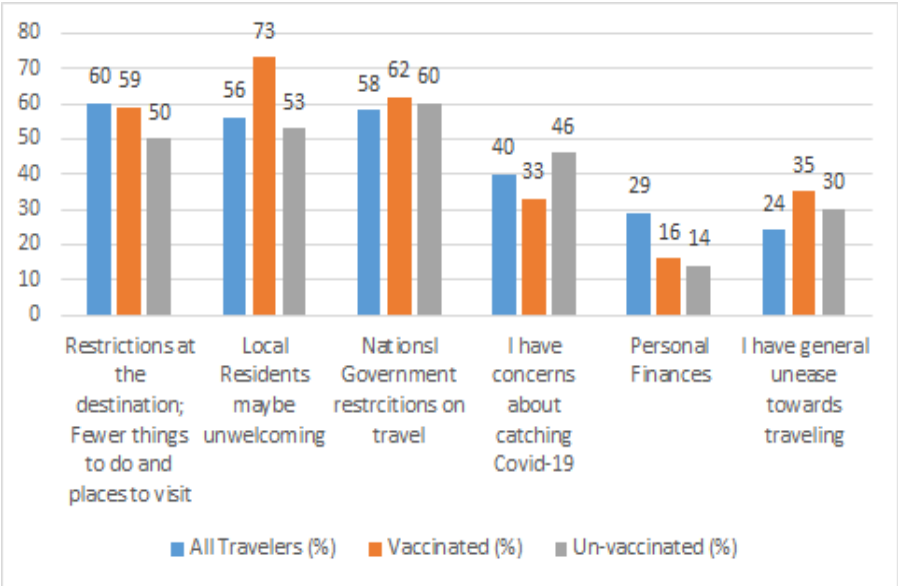
a. Characteristics and Impacts of Covid on OIC Tourism

i. Short-term Impacts

There are two main approaches to how tourism will recover from Covid-19. The first scenario focuses on the pent up demand from travelers that were unable to travel during Covid-19. This segment will “revenge” the lockdowns as soon as the restrictions are lifted and borders are open. This volume of this revenge travel is expected to make up for the losses as soon as Covid-19 is over. The second approach focuses on the new normal and predicts various transformations and long-term restrictions on travel. According to this hypothesis the recovery will be slow and gradual and global tourism will never be like before.

Despite re-lockdowns and different waves, empirical research suggests that the first scenario is more likely. For example, research on potential British travelers (Figure 88) shows travelers are more likely to avoid travel not because they are afraid of catching Covid-19 but because they think their holiday experience would suffer. Mobility and activity restrictions, locals perceptions about tourists as potential virus threats and national government bans against travel were the major sources of concern. Thus governments should also be able to preserve the quality of tourist experience while opening up. What is required from tourists should also be communicated effectively, because most tourists find it frustrating to understand what rules apply for tourists during the pandemic.

Figure 88. Concerns for Travel during Covid-19

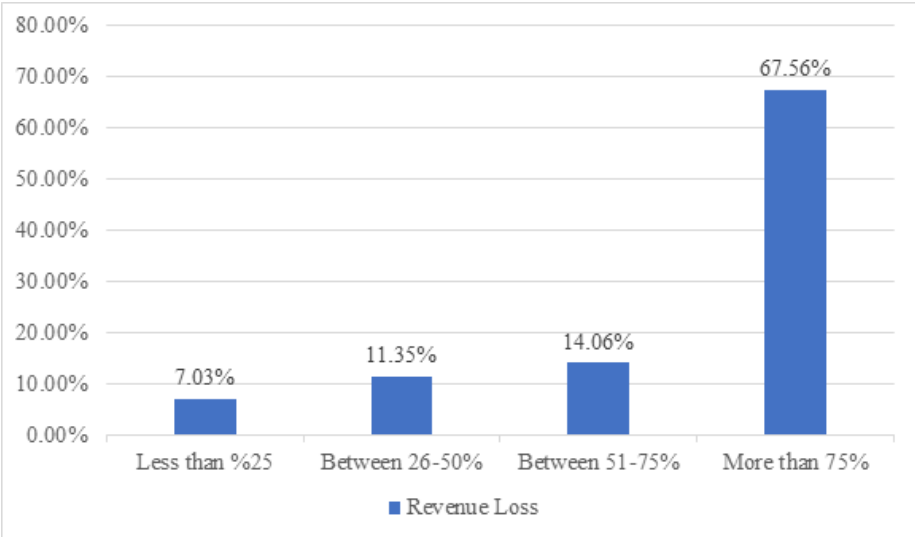


Source: VisitBritain (2021).

Besides various tourist attractions, museums, restaurants offering limited services, creative industries, music, local crafts, sports, performing and visual arts suffered a lot. 30% of creative jobs are estimated to be lost for good during the pandemic. Because these also make up a major part of the tourist experience, governments should find ways to sustain these industries and continue providing services to tourists.

In order to identify the impacts on the tourism industry 185 surveys collected from case countries and other OIC countries were used. Based on the data 68% of the respondents stated they lost 75% of their pre-Covid revenue. The revenue loss during the pandemic is displayed in the figure 89 below.

Figure 89. Tourism Industry Revenue Loss during Covid-19 (%)



Respondents were also asked how long they would sustain their operations without external support. Only 6.6% of the respondents stated that they would continue their business for a year more while more than half of the informants mentioned that they would discontinue their operations within the next three months. These are shown at figure 90.

Figure 90. Tourism Industry Operational Survival (%)

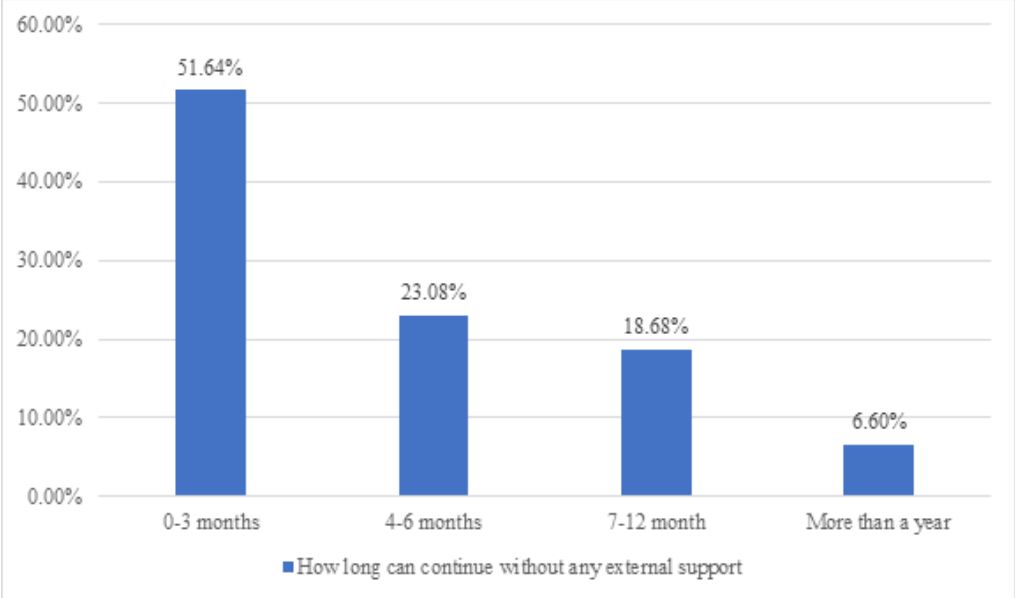
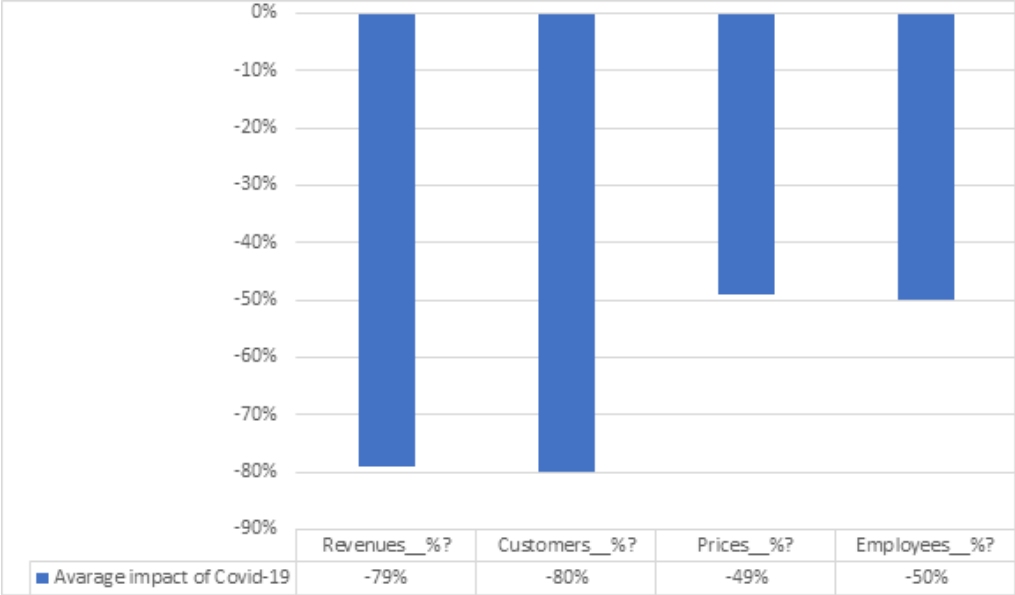


Figure 91. Impact of Covid-19 on Performance Indicators (%)



Covid-19’s impact on tourism organizations was also measured based on other indicators. On the average OIC tourism organizations are expected to lose 79% of their revenue,

80% of their customers, and 50% of their employees. The industry representative also envisioned a 49% decrease in prices as shown above.

Some countries adopted a gradual opening based on the level of the spread. For example Slovenia based the level of lock down with different colors referring to different restrictions on tourism, mobility and social interaction. Table 5 displays Slovenia’s mitigation strategy.

Table 5. Slovenian Covid Semafor

RULES AND SERVICES	BLACK	RED	ORANGE	YELLOW	GREEN
7 days Covid infection rate	Above 1350	Below 1350	Below 1000	Below 600	Below 300
No. of hospitalised Covid patients	Above 1200	Below 1200	Below 1000	Below 500	-
Night movement (police curfew)	CLOSED				
Scheduled Public transport	CLOSED				
Essential services (food, pharmacy, banks)	OPENED				
Olympic sports	OPENED				
Outdoor recreation (no contacts only)	OPENED				
Individual and family recreation	OPENED				
Selected sport recreation, groups to 10	CLOSED				
Other services	CLOSED	OPENS			
Ski areas	CLOSED	OPENS			
Groups up to 10 people allowed	CLOSED	OPENS			
Trade entirely	CLOSED	CLOSED	OPENS		
Restaurants - outdoor space only	CLOSED	CLOSED	OPENS		
Free movement among regions	CLOSED	CLOSED	OPENS		
Tourist accommodation and restaurants	CLOSED	CLOSED	CLOSED	OPENS	
Bars and night clubs	CLOSED	CLOSED	CLOSED	CLOSED	OPENS

ii. Long-term Impacts & Transformations

As a sector with intense human interaction, the tourism industry will certainly witness many long-term transformations after Covid-19. One might predict that the capacities will fall, the quality will be more important than quantity and the per person tourist spending will

increase. Mass tourism will also suffer, all-inclusive, open buffet systems will be replaced with more customized and sustainable options. People are also more likely to travel less but stay more nights at a destination.

The importance of destination governance and coordinated response amid Covid-19 is also evident. This will enhance the significance of DMOs. Robots and automated systems will be employed more, ICT and digital systems will also gain power. The room service will be more common, standards for hygiene and sanitation will be enhanced, disposable materials will be more popular, the rooms will also be redesigned to include portable kitchens. The sharing economy will also suffer, people will only consider professional service with proven hygiene standards before hiring these units. However, if professional certification and standards are supplied, the sharing economy will be preferable as a more isolated stay. The importance of creating loyal clients will be more crucial for tourism service providers as trust will play a major role in the decision making process (Pektas & Hassan, 2020).

Tour operators will also be specialized, and they will host smaller groups. Nature-based tours will also be more popular. The disintermediation of brick-and-mortar travel agencies will gain pace. There will be fewer people willing to go to a travel agency to book. Hence online channels will be even more important (Tengilimoglu & Hassan, 2020). There will also be implications for professional tour guides (De la Harpe & Sevenhuysen, 2020), digital guides will be preferred more and because the group sizes will shrink and the driver-guide will be more popular, particularly for travel agencies. Flexible cancellations and no-show fees will be redefined. Digitalization will also gain pace. More than 75% of MICE will continue as virtual.

Hence both DMOs and tourism industry stakeholders should be ready for a post-corona environment. There are different scenarios when the industry will recover, what new challenges and standards will be imposed, who is more likely to travel, which products and services will disappear and transform. Hence the stakeholders should be able to create different action plans for each scenario to be put into action after recovery. Destination image shall also be re-positioned based on safety, health and cleanliness. All stakeholders should also make sure they have a risk and crises management plan and a strong financial structure to improve their resilience in the future.

Because of fluctuations in the number of cases and new variants, mobility and border restrictions are still sudden and frequent. This will change the nature of operations, travel

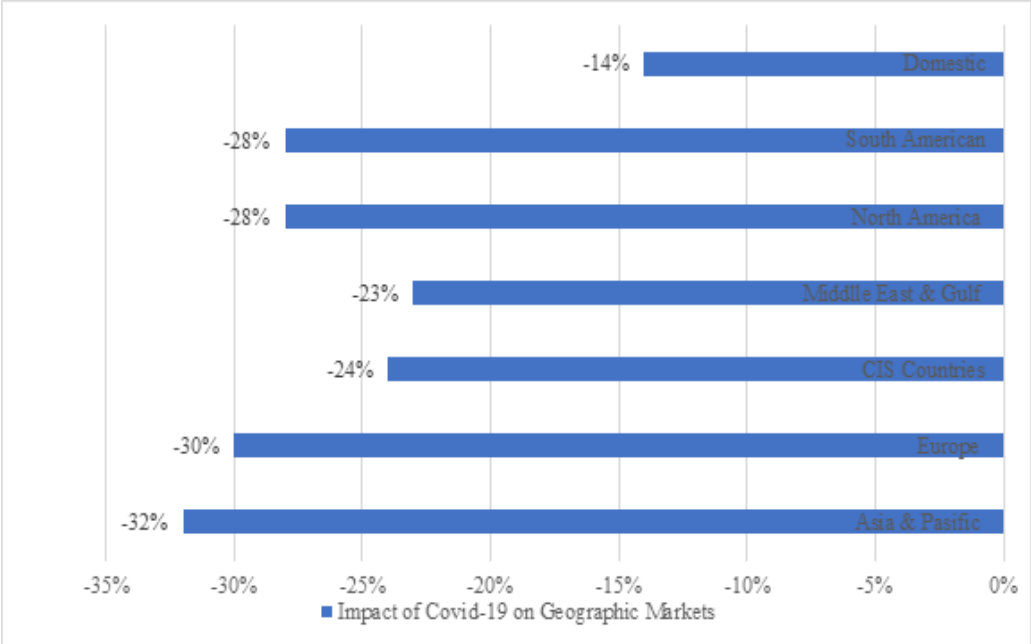
insurance will become more important, there will be a relaxation in cancellation policies, and last minute bookings will increase.

Preferences will also change. Travelers will be less interested in mass-package tours, independent services and small groups will be more popular. Virus resistant young travelers will replace the silver hair tourists who are more open to risks created by Covid-19. Travelers will also be more responsible towards nature and host communities. Travelers will travel to fewer destinations but the average length of stay and average spending will also increase.

Short haul domestic tourism will precede international travel. Several countries are already encouraging domestic travel to international and rural tourism rather than urban tourism. Some countries are offering holiday vouchers within the country, some others extend bank holidays to encourage people to travel, cheap holiday credits and favorable holiday packages are other means of facilitating domestic tourism. These are further explored under government mitigation strategies below.

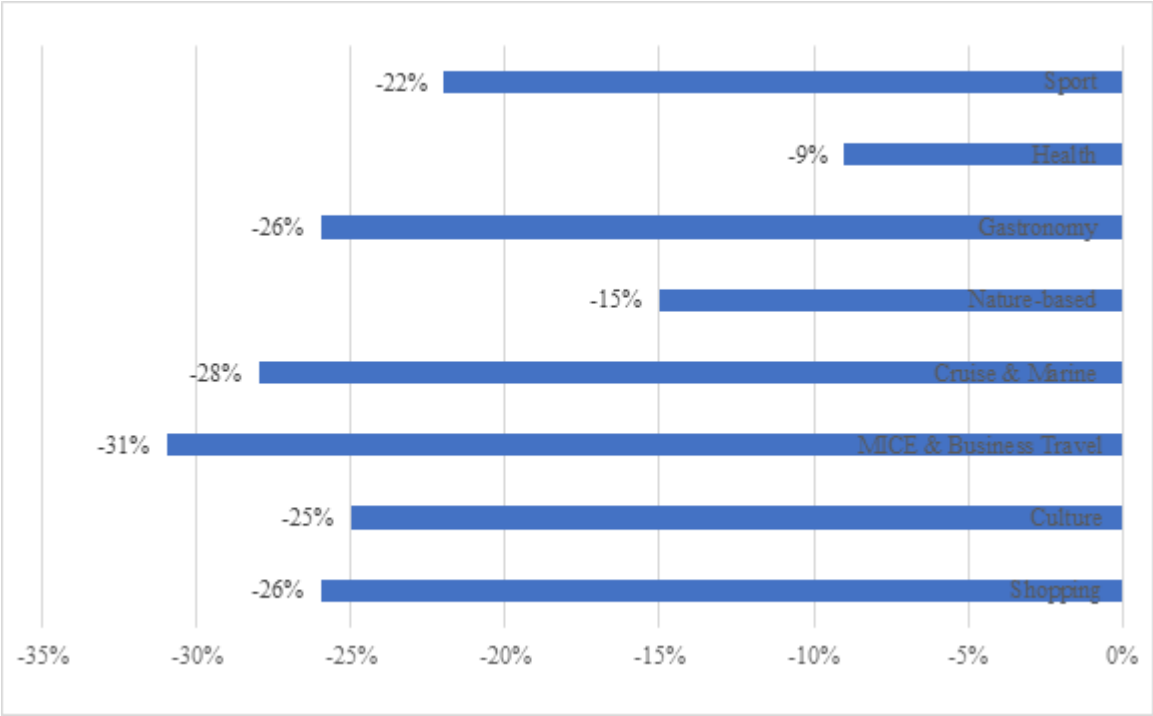
This is in line with the feedback from OIC tourism experts. Based on responses to the questionnaire, domestic tourism will be the most resilient market segment to impacts of Covid-19 with only a 14% decline. Middle-East & Gulf (-23%) and CIS (-24%) countries were also perceived as more resilient compared to Americas (-28%), Europe (-30%) and Asia&Pacific (-32%). These are displayed in figure 92.

Figure 92. Impact of Covid-19 on Geographic Markets (%)



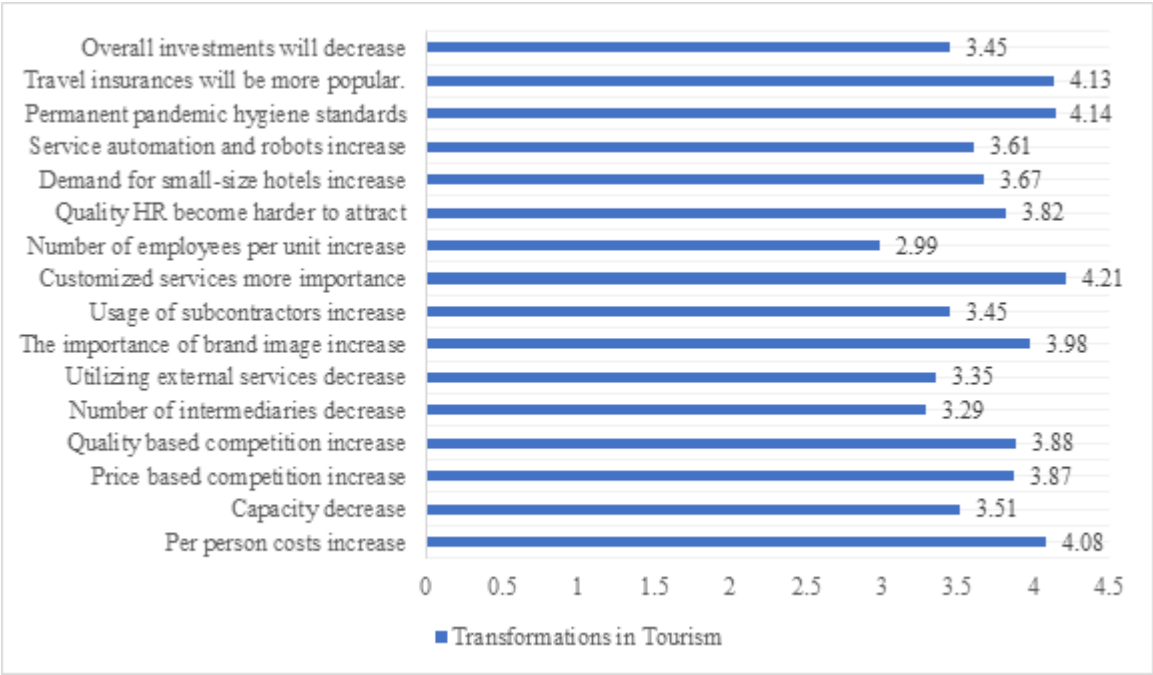
Respondents were also asked about their perspectives on the impact of Covid-19 on various tourism types. Health tourism (-9%) and Nature-based tourism (-15) were perceived as far more resilient than other tourism motivations. MICE tourism was rated as the most vulnerable tourism type with an expected 31% decrease. Cruise tourism (-28%), Gastronomy (-26%), Shopping (-26%) will also experience significant declines as these are usually mass events and social distance measures makes these tourism motivations vulnerable to restrictions. Expected impact of Covid-19 on tourism types are shown on figure 93.

Figure 93. Impact of Covid-19 on Tourism Types (%)



Operational transformations awaiting the industry were also rated by the industry members at OIC. Based on their expert feedback; Increased importance of customized services (4.21), Pandemic hygiene standards becoming permanent (4.14), Increased popularity of travel insurance systems (4.13), Increases in per person costs (4.08), and Increased importance of brand image (3.98) were rated as the prevalent transformations in tourism operations. Other transformations are listed at figure 94 below with their ratings.

Figure 94. Transformations in Tourism after Covid-19



Tourism volume will probably return to 1990 levels after Covid-19. The continued uncertainty associated with the pandemic coupled with the emergence of several waves lead to different scenarios that are likely to shape the future of the tourism and travel industry. What has become clear is that even if the pandemic disappears completely in the short-term, permanent transformations will probably emerge, influencing various aspects of the tourism and travel industry.

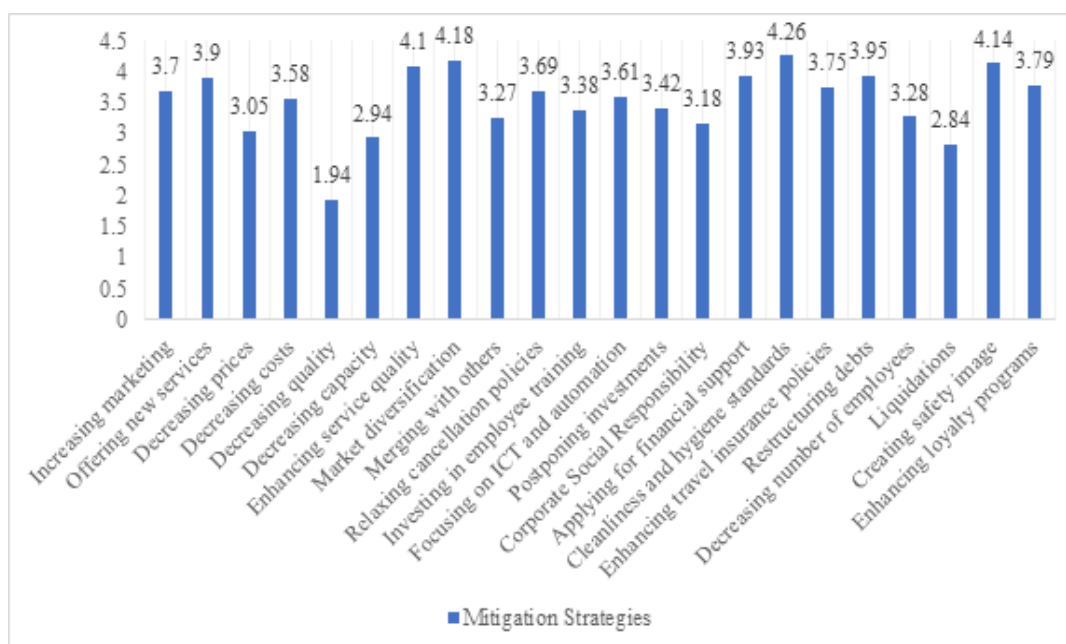
There are two major scenarios about the recovery of tourism amid Covid-19. The first hypothesis is on revenge travel referring to a pent up demand during the restrictions and oversees a boom in travel demand after Covid-19. This hypothesis is based on the belief on accumulating demand and people will avenge the pandemic as soon as the mobility restrictions are lifted. The second scenario is based on a slow recovery and structural changes in tourism which also refers to a new normal. Research looking into tourist behavior usually confirms the first scenario and suggests that most travelers refrain from travelling because they are banned to do so and they postpone because of diminished travel experience stemming from lock-downs at the destination.

iii. Mitigation Strategies

1. Private Sector Mitigation Strategies

Literature suggests various crisis strategies used by tourism organizations such as decreasing costs, enhancing marketing communications, decreasing capacity and so on. These strategies were also explored during the qualitative stage of empirical study and a pool of strategies were adopted during the quantitative stage. Tourism Industry representatives were also asked about the importance of these organizational strategies that are used to mitigate the impacts of Covid-19. Enhancing cleanliness and hygiene standards (4.26), Market diversification (4.18), Creating safety image (4.14), Enhancing service quality (4.1), Restructuring debts (3.95) and Applying for financial support (3.93) were listed as the most important organizational strategies. Details of OIC tourism industry mitigation strategies and their ratings are shown on figure 95 below.

Figure 95. Tourism Industry Covid-19 Mitigation Strategies

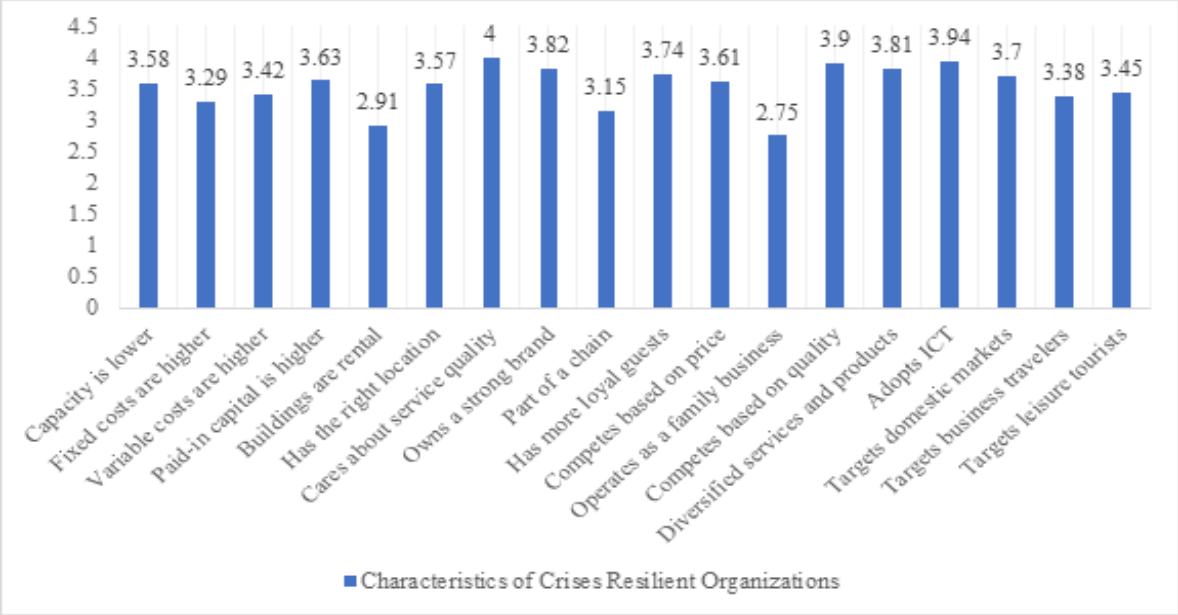


a. Characteristics of Epidemic Resilient Tourism Industry in OIC

Biggs et al. (2012) found informal tourism enterprises in Phuket (i.e. small-scale, self-employed entrepreneurs) were more resilient than formal ones (i.e. licensed, taxation registered businesses) and recovered more quickly from the decline in visitors occasioned by the tsunami in 2004 and the financial crisis in 2009. Characteristics of more resilient tourism organizations were also explored in the empirical study on OIC tourism industry representatives. Offering quality service (4), Utilizing ICT (3.94), Differentiating based on quality rather than price (3.9), operating under a strong brand (3.82) and Offering diverse products and services (3.81) were

stated as the most important characteristics for Covid-19 resilient tourism organizations. Other organizational characteristics and their ratings are displayed on figure 96.

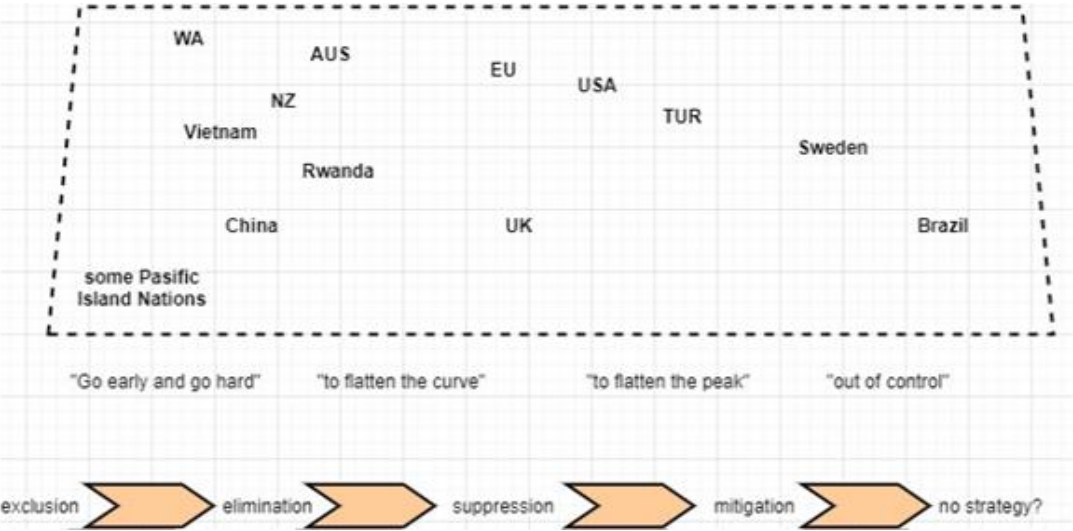
Figure 96. Characteristics of Crises Resilient Organizations



2. Government Mitigation Strategies

Despite governments offered assistance in various other crises, unlike others, Covid-19 resulted in large scale border closures and quarantine imposed by governments which also disturbed the markets. The severity of impact also made governments adopt various strategies to help economies survive the crises.

Figure 97. Covid-19 Response Strategies



Source: Adopted from Baker, Wison and Blakely (2020).

Figure 97 displays the extent of government strategies against Covid-19. Countries such as China, Vietnam, New Zealand and Australia were so harsh on their responses that they isolated the country, implemented immediate lockdown measures and tried to eliminate Covid-19 altogether and targeted “zero” infection. Tourism industry, like the majority of the economy, suffered to a great extent in these countries. Then there are countries who tried to manage the crises to flatten the curve and peak of infections. These countries applied time and place limited lockdowns and tried to keep their economy running. Turkey might be considered under these groups of countries who tried to keep a balance between virus protection and survival of the economy. Finally there are these countries who targeted herd immunity without a major restriction. The tourism industry in these regions also suffered because of travel bans established to these countries.

Governments have taken various measures to support their economies as far as possible and to at least partially mitigate the impacts of Covid-19 on business. While trying to contain Covid-19 and managing the public health system, the government also tried to keep jobs and prevent bankruptcies to protect the economy to be able to restart after Covid-19. They utilized various strategies to create this balance; taxes/fee deferrals and discounts, loan facilitation, government guarantees on loans, discounted interest rates, credit holidays, short-time work compensations, wage subsidies, unemployment grants, accelerated depreciation.

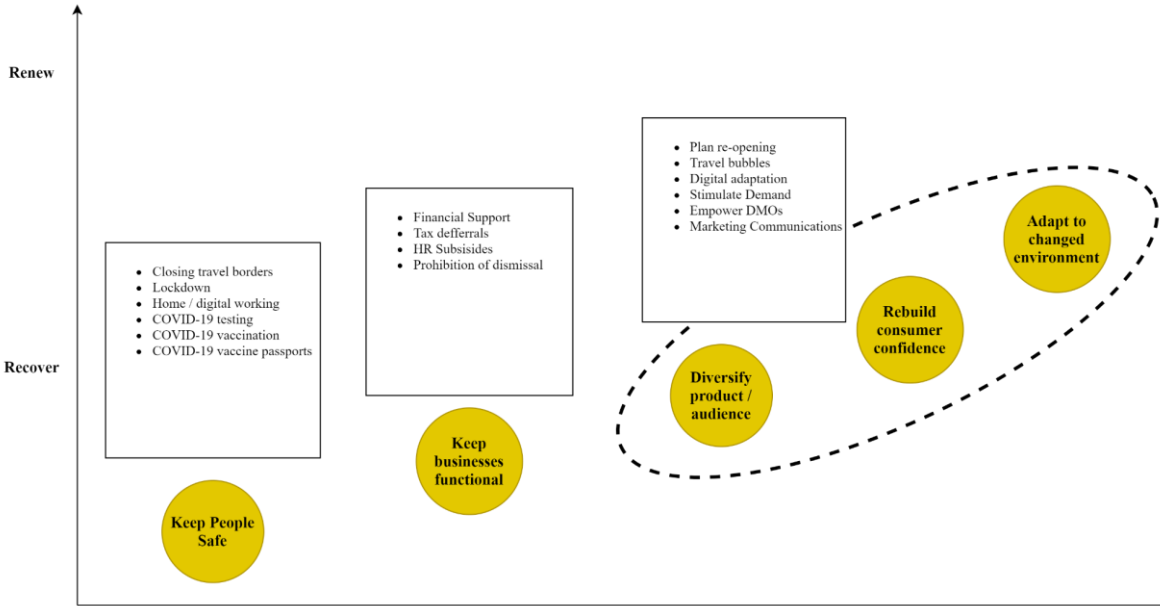
Weak capacity to reactive response, late and inefficient communication, coordination and delivery are frequent critics for governments in responding to crises (Christensen et al., 2016). Despite the significance of the speed of government intervention (Rosenthal and Kouzmin, 1997), the spontaneous and sudden development and the scale of Covid-19 caught the industry and governments unprepared. The wave of privatization, decentralization and market economies also limit the capacity of governments to take direct actions to mitigate the risks in different sectors of the economy. This resulted in trial-error and shifting responses to the pandemic. Re-lockdowns, extending emergencies and ad-hoc measures were common even a year after the first case was identified. In the absence of an academic assessment governments are still trying to find a balance between controlling the spread of the virus while also keeping their economy afloat (Higgins-Desbiolles, 2020).

Research suggests that larger spending packages during the first years of the pandemic will have significantly larger impacts in future years (Ma, Rogers and Zhou, 2020). Hence governments should see these subventions as investments rather than strain on government finances without any return. Naturally, however, the effectiveness, targets and type of these subventions should be carefully considered.

a. Generic Support

From the beginning of the pandemic the priority was safety of people, then governments also realized that they also need the economy floating and help businesses survive. As the vaccination numbers grow the governments are now trying to adapt to the future by diversifying tourism products and markets while also rebuilding tourist confidence.

Figure 98. Government Covid-19 Mitigation



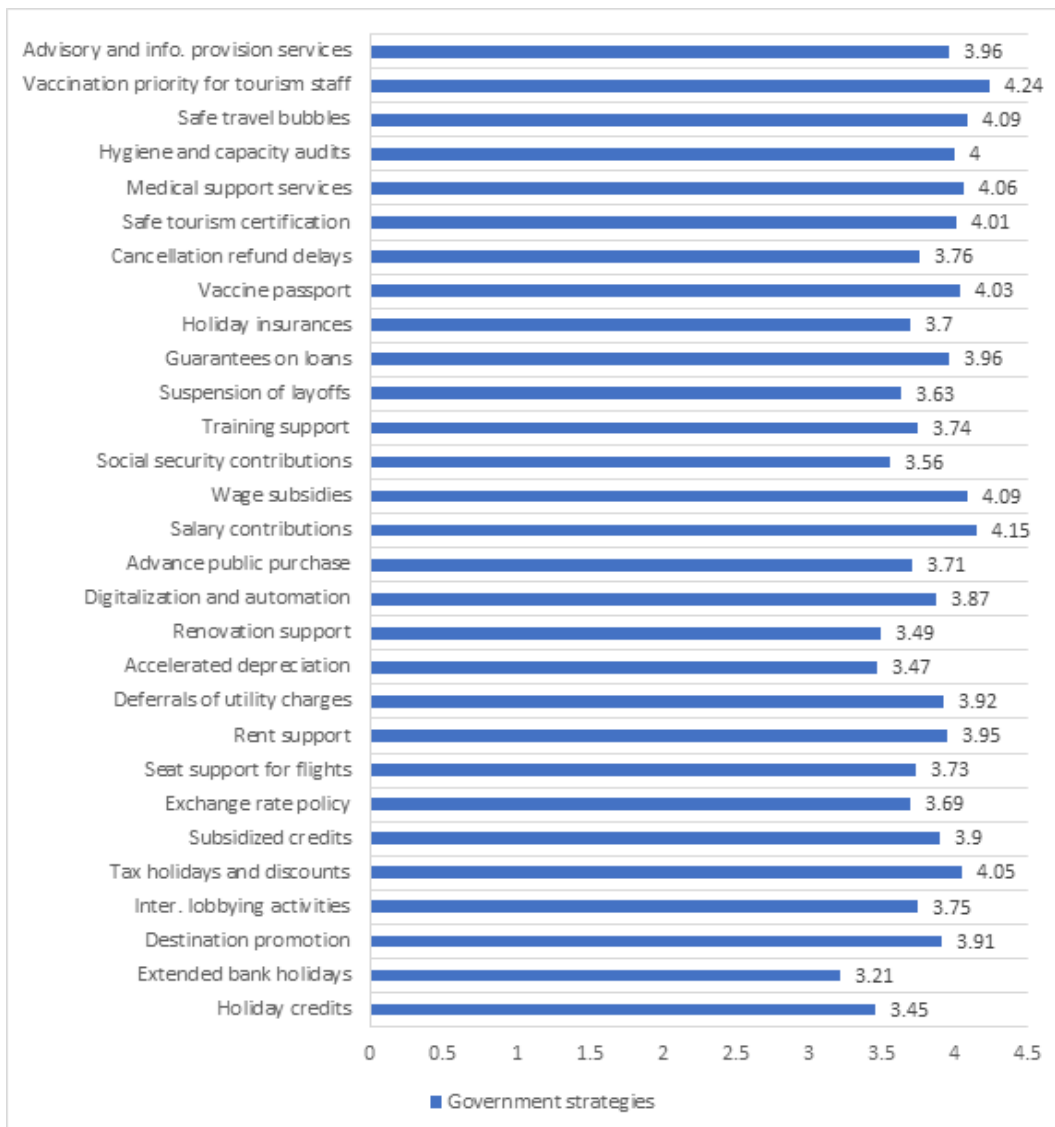
Stimulus packages targeted to employment are efficient in tourism as a human-intensive service. However, independent self-employed workers and their families are often not eligible for government support packages (Jones & Comfort, 2020). Some countries have introduced measures specifically aimed at the self-employed, which is particularly relevant for many micro and small tourism businesses. Generic support will not only benefit the tourism sector but also support incomes and general consumer spending and consequently travel demand, particularly when restrictions are lifted.

b. Tourism Specific Support

i. Subventions targeting the industry

Most generic subventions overlook the less established, micro-entrepreneurial and informal nature of tourism businesses. These small lifestyle businesses and freelance entities operating in tourism lack resources to institutionally represent themselves and apply for generic support (AEIST, 2020). In this report, government mitigation strategies during Covid-19 were also compiled based on qualitative research and literature review. The importance of these mitigation strategies were then rated by the industry experts operating in OIC member countries. Based on their responses; Vaccination priority for tourism staff (4.24), Salary contributions for tourism employees (4.15), Safe tourism corridors and bubbles (4.09), Wage subsidies (4.09), Medical support services (4.06), Tax holidays and discounts (4.05), Establishing vaccine passport systems (4.03) and Safe tourism certificates (4.01) were identified as the most important government subsidies. The list of government subventions rated by the OIC tourism experts are displayed below;

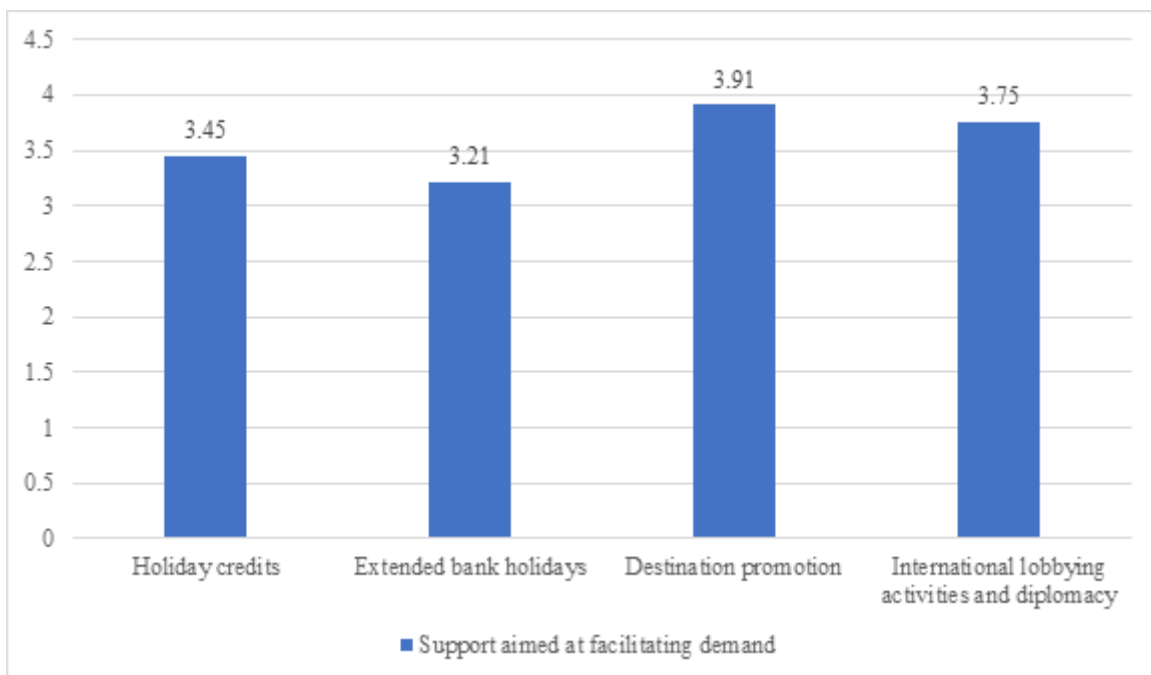
Figure 99. Importance of Government Mitigation Strategies.



ii. Subventions for enhancing demand

Government strategies were also grouped under five main factors as; Subventions for facilitating demand, Financial Support, Support for human resources, Legislative actions and Operational processes. Facilitating demand is composed of strategies mainly targeting destination marketing and enhancing particularly domestic tourism. Destination promotional activities (3.91), International PR, diplomacy and lobbying activities to open borders (3.75), Holiday credits and vouchers for residents (3.45) and Extended bank holidays for enhancing local demand (3.21) were the main activities under these mitigation strategies as displayed in figure 100 below.

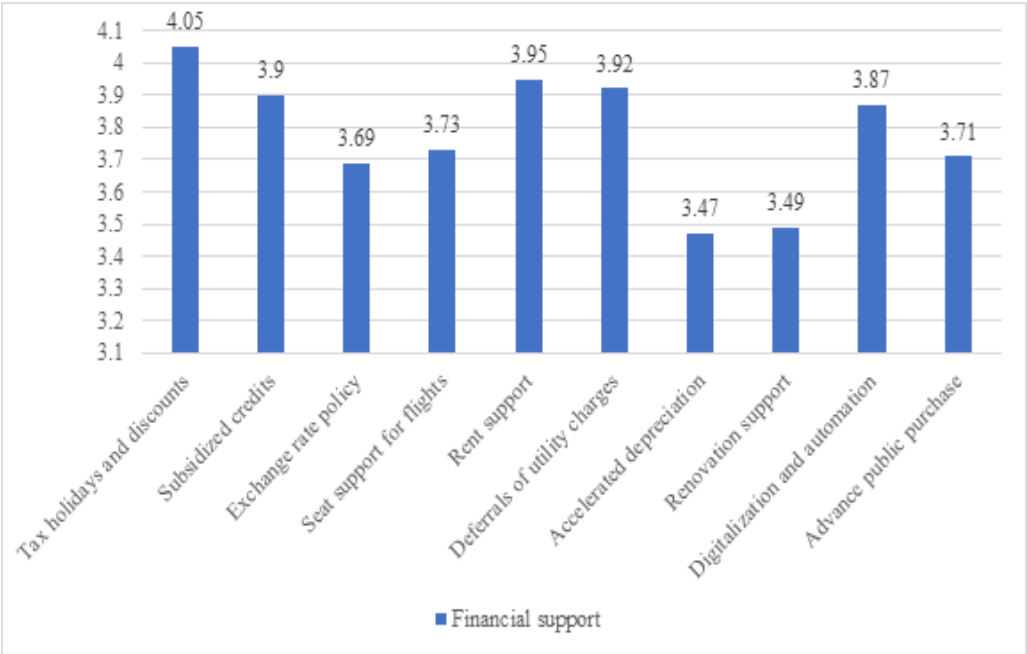
Figure 100. Government Support Aimed at Facilitating Demand



iii. Financial Support

Financial Support aimed to help the tourism industry adjust their cash flow were also identified as an important area of government support. Tax holidays and discounts (4.05), Rent support (3.95), Deferrals of utility charges (3.92), and Subsidized credits (3,9) were listed as the most important financial support items as shown below.

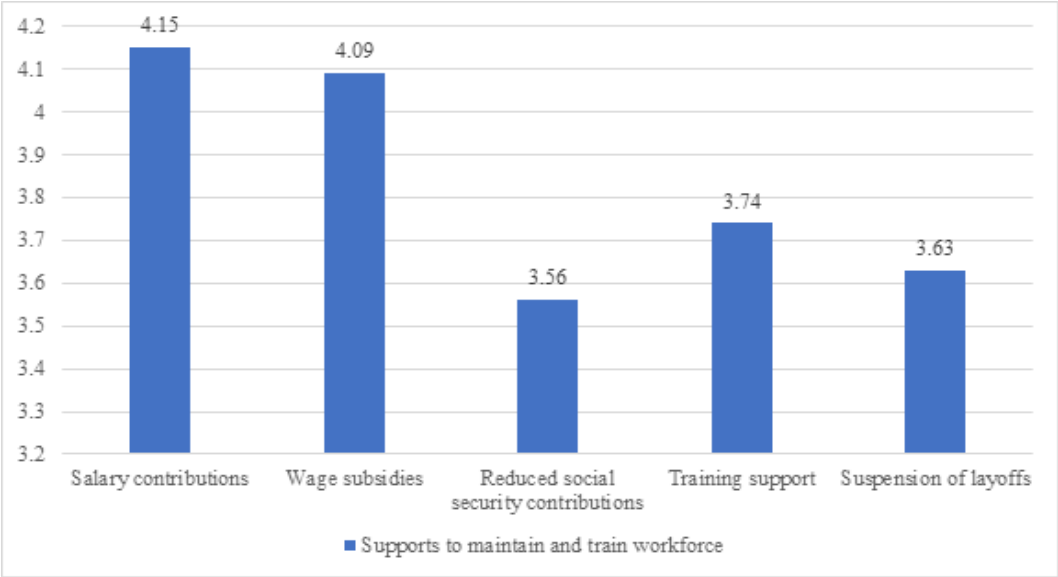
Figure 101. Government Financial Support



iv. Support for Human Resources

Tourism is a human intensive industry and employs eight times more than other sectors of the economy. Quality of tourism services also depends very much on the quality of human resources. Hence training employees, motivating and keeping them becomes crucial for tourism organizations. Therefore support for human resources; Salary contributions (4.15), Wage subsidies (4.09), Training support (3.74), Suspension of layoffs (3.63) and Reduced social security contributions (3.56) were all rated as important as displayed in figure 102.

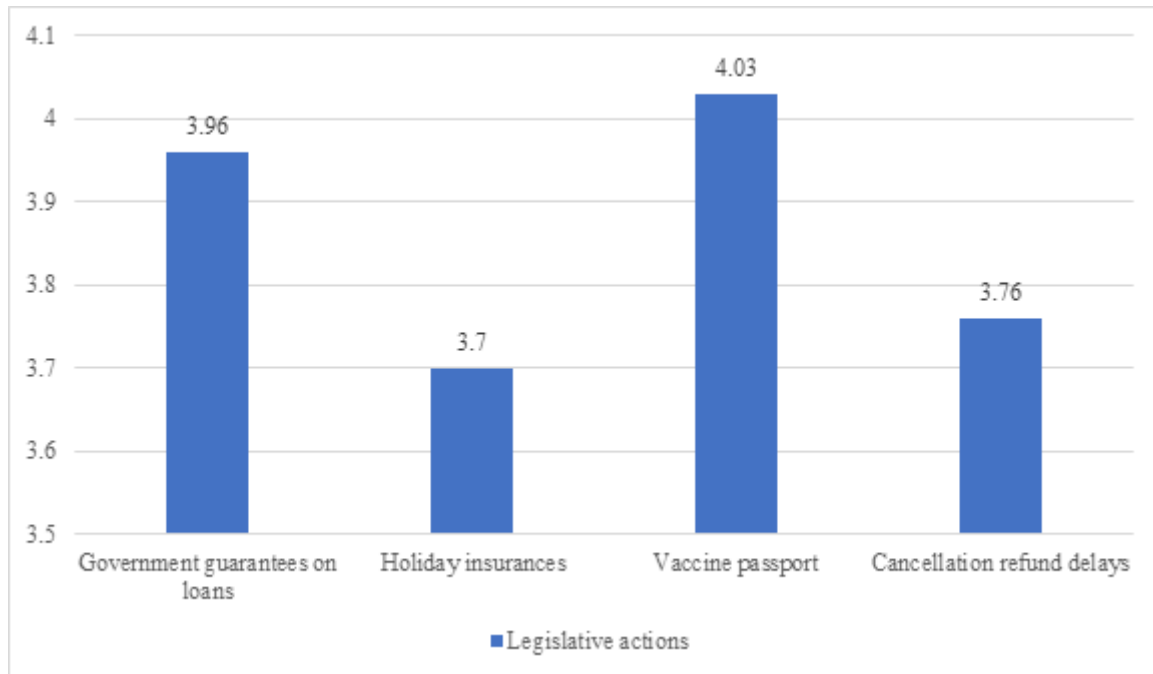
Figure 102. Supports to Maintain and Train Workforce



v. *Legislative Actions*

Legislative actions such as Introduction of Vaccine passports (4.03), Government guarantees on loans and credits (3.96), Cancellation refund delays (3.76), and Holiday insurances (3.7) were perceived significant particularly for travel trade who book and pay their packages in advance. These legislative actions are listed on figure 103 below.

Figure 103. Legislative Actions



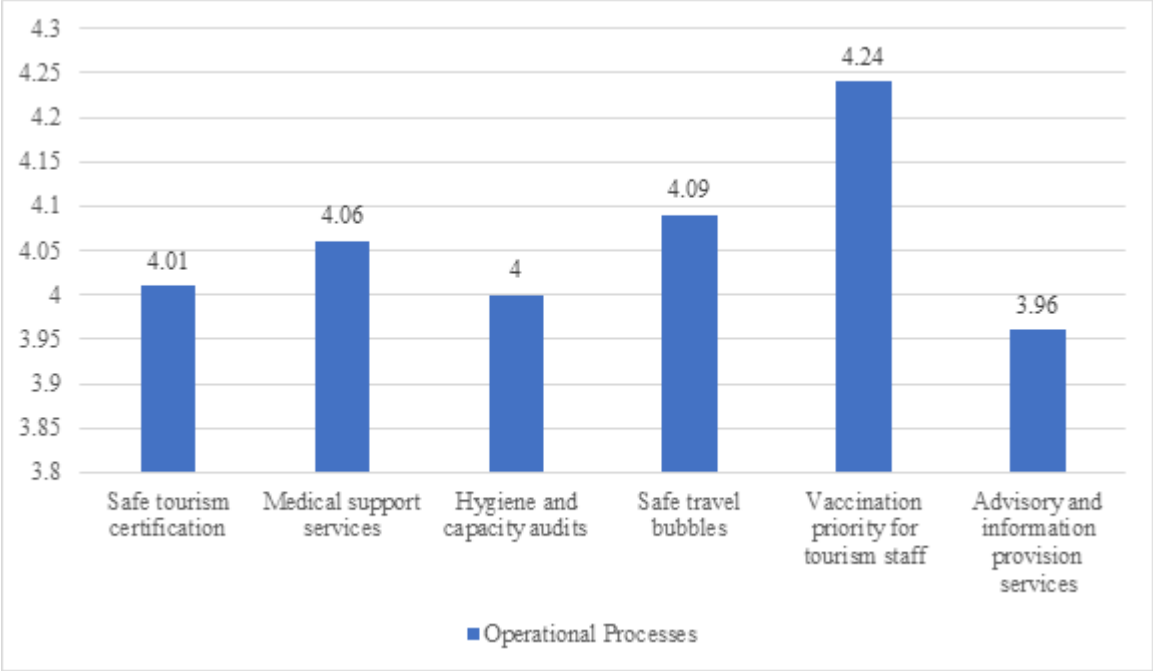
vi. *Operational Processes*

Operational processes were items related to the actions targeting efficient operational handling of the pandemic. Vaccination priority for tourism staff (4.24), Safe Travel corridors and bubbles (4.09), Medical support services (4.06) such as testing services at the borders, Safe tourism certification (4.01) for tourism services, Hygiene and capacity audits (4), and Advisory and information provision services (3.96) for tourists and tourism stakeholders were all grouped under operational processes as shown at figure 104 below.

Because the impacts of crises including Covid-19, are international and unpredictable, countries should incorporate crisis management structures into their planning especially considering image building, assurance, safety and recovery incentives for the industry. A crisis management plan and a task force to deal with potential crises are required at NTO (National Tourism Organization) and DMO (Destination Management Organizations) levels. Previous

experience has shown that crises create different impacts on different regions. Therefore rather than offering central solutions governments should empower regional DMOs.

Figure 104. Operational Support



Minimizing losses, ensuring health, safety and a convenient return home and limiting negative media presence, effective search and rescue efforts, provision of safe shelter with health services for tourists, tightening security in touristic areas are other immediate actions to be considered. In the long term image recovery efforts are also required and public relations and media activities gain importance at the destination level. Yet, there are other stakeholders affected by crises other than tourists; locals and the tourism industry should also be supplied with recovery options. Another major alternative is to create Safe tourism OIC standards; therefore travelers within OIC would know what to expect.

Because the tourism industry is one of the most vulnerable industries to crises, destinations should incorporate crisis management planning into their overall tourism planning, marketing, and management strategies. Thus, risk and crisis management is an integral part of destination management and requires a full involvement and alignment of tourism stakeholders.

Using big data, and artificial intelligence might also enhance early warning systems and effectiveness of recovery strategies. Therefore the tourism industry and public stakeholders should design data collection, integration and analysis tools in order to enhance their risk and crises management processes.

The governments should also be able to preserve the quality of tourist experience while trying to contain the virus. Mobility and activity restrictions, locals perceptions about tourists as potential virus threats and national government bans against travel and mobility should be managed carefully while opening up.

Epidemics, terrorist incidents, refugee crises are still important obstacles for tourism in the region. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of OIC destinations.

Besides risk and crises management strategies and recovery measures, OIC governments should also focus on their tourism industry's long-term competitiveness. Enhancing entrepreneurial activities in tourism might enhance utilization of tourism potential within OIC and trigger innovation and destination development. Investing in infra-structure in OIC destinations, adjusting the legislation and bureaucracy for and creating a better investment environment by subsidies, credits, land allocations, tax reductions, offering capacity-building programs for local human resources and discriminating local entrepreneurs, intra-OIC investors and brands and facilitating sustainable planned development of member country destinations are alternative strategies particularly amid Covid-19.

Encouraging sustainability, innovation and local entrepreneurship, eliminating bad apples, direct investments in the right direction, creating competitive advantages, managing supply, investing in rural tourism, minding the carrying capacity, improving the value chain, investing and protecting cultural industries, investing on technology, fighting over-tourism, investing on collaborative inclusive destination management, and ensuring diversity in markets and products are some other strategies to create a more resilient tourism industry.

3. OIC Mitigation Strategies and Covid-19 Mitigation for Tourism

Lack of tourism income is detrimental to foreign exchange income and thus the economy of many OIC countries. Unfortunately, despite Covid-19 being a major crisis, OIC countries have already been facing various other crises besides the past epidemics, including political conflicts, terrorist events, natural disasters, etc. Hence, OIC also needs to prepare and establish risk and crises management procedures to create a more crisis immune and competitive tourism industry.

This report explored the impacts of Covid-19, the transformations in the market, and effective mitigation strategies by exploring international literature and empirical data collected from four OIC case countries. A collective approach based on the experiences of different countries in dealing with the current crisis is therefore important to draw significant conclusions that can potentially direct public policy oriented towards reducing the negative impacts of the pandemic on tourism and paving the path to recovery.

This is also a period of investment and capacity building and work-out long-standing problems within OIC tourism. Destinations use this time to restructure, improve and invest on infra-structure, human resources, digital platforms, and destination governance. Among these problems are low service quality, low per capita tourist spending and leakages from local economies. The tourism industry in the OIC has been developing at a rapid pace. Yet, the increase in income generated in tourism is well below the growth rate in the volume. Therefore, OIC tourism is not able to reflect the volume increase in per capita spending. The average tourist spending was around 750 USD below the crises, which is well below the global average of 1,000 USD. Yet, Covid-19 succeeded to increase per tourist spending to 985 USD in 2020 in OIC countries.

The Corona pandemic forced the tourism system to stop in its tracks, which may be a once-in-a-lifetime opportunity for tourism to re-invent and re-structure itself and 'build back better'. Hence, if member countries invest in tourism service quality and try planning the disturbed balance between tourism supply and demand in a sustainable manner, there are also some opportunities.

One reason for this low per capita spending is the scarcity of tourism activities and low quality of services. Because of limited human and financial capital, OIC countries also tend to import know-how in the form of franchises. Despite international brands and management firms enhancing the service quality, they also create substantial leakages from the economy in profits and commissions transferred to the franchisor, foreign staff wages and management fees. One way to solve these obstacles is by encouraging tourism entrepreneurship and building local entrepreneurship capacities. Hence governments might be more selective in their support for better quality services with higher input for local value chains.

OIC also needs to have a central governance structure at the OIC level to coordinate and invest long-term resilience against the crises. Establishing standards to enhance restrictions free

travel between OIC countries such as vaccine passports, shared rapid testing and online tracking systems, declare common health, safety, cleanliness and hygiene standards and audit systems for safe tourism certification within OIC, agree on general semaphore and rules for border closures within OIC would could create a more credible and predictable environment for tourism industry within OIC. Such an institution would also create economies of scale for various expenses on testing and tracking than each country investing on its own certification, tracking and so on.

Another implication is to establish Covid-19 free tourism bubbles that minimize contact and risk of infection by establishing and limiting tourist touch points and vaccinating tourism employees. There are two approaches to isolating the spread of the virus in tourism. One way is to immunize tourists through border restrictions (test, quarantine, vaccination) and the other way is to immunize and isolate locals through tourist bubbles. Travel corridors between certain countries with similar infection rates can also be established to prevent any incremental risk because of travel. Australia and New Zealand; the Baltic Countries (Latvia, Lithuania and Estonia); and the Schengen zone have taken steps to create these bubbles provided that the virus is continued at a level in travel corridor countries. These bubbles and corridors would also be established by the central governance at OIC. Information on Covid-19 and restrictions should also be disseminated to tourists (eg. instructions, regional infection rates, apps, hotlines) for these tourist bubbles to work effectively.

There is also a need to establish a Standard Semafor within OIC based on international collaboration, standards and collective effort to contaminate the impacts of crises. This is particularly important in the case of epidemics where each country responds with a different border policy instead of a unified, predictable response. Several countries and international organizations already introduced criteria that should be met before reopening particularly based on the number of new cases and infection rates. OIC needs to design its strategic path out of lock-down (museums, libraries, hotels, conventions, border restrictions, quarantines, vaccination passports, testing and tracing requirements) and make its destinations accessibility more predictable. Tourism activity is a matter of planning, particularly international travel is very sensitive to last minute changes. Using these guidelines for planning and systemizing gradual easing of restrictions within the OIC, the private sector can also design their operations.

Marketing communications, public relations and lobbying activities are also important, to create a safe image and build trust. Information provision, statistics, border restrictions,

sanitation processes, safe tourism standards, certification, hygiene procedures and how these are monitored and audited are not only important activities but these should also be supported and used in branding and repositioning OIC countries as safe destinations.

Based on the transformations expected OIC countries need to adopt their strategies and priorities products and markets based on the new normal. Previous research and empirical study based on OIC tourism experts confirmed nature based tourism and health tourism are more resilient and will be more popular. Focus should also be directed towards open-air activities, individual tours rather than mass package tours and activities.

Domestic tourism has also proven more resilient than incoming tourism. Therefore special offers around holiday weekends and festivals should be prepared. The key is not necessarily to offer the cheapest prices, but rather to offer value-for-money particularly for domestic demand. Short haul domestic tourism has preceded international travel in various destinations (e.g. Russia, China). Several countries are already promoting domestic travel instead of international and rural tourism rather than urban tourism. Some countries are offering holiday vouchers within the country, some others extend bank holidays to encourage people to travel, and use cheap holiday credits and favorable holiday packages as other means of facilitating domestic tourism. Literature also confirms a destination is more resilient and competitive if there is domestic demand. Targeting long term stays and senior tourists who are less likely to spread the disease are other ways to continue tourism while keeping residents safe.

OIC tourism industry should also make better use of Information and Communication Technologies (ICT). The sustained impacts of Covid-19, new variants have created an unpredictable environment with changing border restrictions, and quarantine measures. Big data analytics used for scenario planning and decision effectiveness might collect and mine different Covid-19 and travel data and offer different scenarios about the volume, source markets and revenues. ICT can also be utilized to effectively isolate, contaminate and trace the spread of the virus. Adoption of rapid testing and tracking systems, coordinated cross-border testing and tracing will improve confidence among countries and better manage travel restrictions and quarantine measures allowing real-time information about contact information not only in destination country but also in generating country before travel.

Machine learning systems can be applied to the restaurant drive-through, online ordering and web-based hotel reservation processes. The OIC tourism experts also confirmed

Digital will be a part of the new normal. Robotics has also entered the kitchen on cooking lines and hotel housekeeping functions, and drones may be joining home delivery applications for restaurants. Many restaurants utilizing robots are now doing the same amount of work with 50% fewer individuals. Creating touchless services and integration of ICT, robots and AI might also increase effectiveness of Covid-19 free travel bubbles. There will be greater utilization of technology in the industry to improve the efficiency and effectiveness of how we deliver our products and services. In order to create both high-tech and high-touch services, the OIC tourism industry needs to invest in technology, AI, touchless service processes and service robots. Integrating information collection, scenario planning, research and data analysis into risk management strategies will also deliver better precision in decision making and forecasting.

A major competitive strength of OIC countries is major legacy airlines operating in the region. These air connections make OIC destinations more accessible. Yet, because of high fixed costs major airlines are struggling to survive with international border restrictions. Most western countries have already announced recovery packages for their flag carrier airlines (KLM, Scandinavian, Lufthansa) and subsidies for low cost airlines. OIC countries should also consider subventions, credits, and fiscal support for the airline industry. Decreasing tax, facilitating domestic travel, seat support, and advance public purchase of airline tickets are some of the strategies already implemented.

Enhancing tourist experience is another major strategy that might be invested while restructuring the industry during Covid-19. Investing in both physical infrastructure, governance and human resources during this period will create a much more competitive tourism industry within OIC after the crisis is over. Major renovations and infra-structure investments can be utilized, local governance structures and collaboration between public and private sectors can be strengthened, and the quality and quantity of potential human resources in tourism can also be enhanced during Covid-19 by providing training and online courses. Restructuring should also be planned based on transformations in the market from mass tourism to more customized and sustainable versions of tourism. The tourism industry should also be more flexible in design and tourism resources should be able to be used in other areas incase of crises (e.g. tourism staff in hospitals, tourism vehicles in delivery services, hotels as hospitals an so on.)

The Corona pandemic forced the tourism system to stop in its tracks, which may be a once-in-a-lifetime opportunity for tourism to re-invent itself and 'build back better'. Enhancing intra-OIC travel, creating travel bubbles between countries, encouraging domestic tourism and family travel, subsidizing tourism for a more resilient industry, investing in collaborative planning, crisis management, and branding are among other strategies to support the tourism industry. This period can also be seen as an opportunity to fix structural problems in the industry concerning sustainability, over-tourism, climate change, and destination governance.

To conclude, member countries need to find new ways to adopt the new normal in tourism and support the growing tourism industry at OIC. Destinations also need to consider ways to establish “safe travel corridors” and “travel bubbles”¹ among OIC countries. OIC can also use these crises and lockdowns to restructure tourism and create a more competitive and resilient industry. Safety and security concerns and political stability are also emerging as major challenges for OIC member states. It is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure tourists' safety and minimize the impact of security threats and health concerns. Epidemics, terrorist incidents, refugee crises are still important obstacles for tourism in the region. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of OIC destinations.

Besides risk and crises management strategies and recovery measures, OIC governments should also focus on their tourism industry's long-term competitiveness. Enhancing entrepreneurial activities in tourism might enhance utilization of tourism potential within OIC and trigger innovation and destination development. Investing in infra-structure in OIC destinations, adjusting the legislation and bureaucracy for and creating a better investment environment by subsidies, credits, land allocations, tax reductions, offering capacity-building programs for local human resources and discriminating local entrepreneurs, intra-OIC investors and brands and facilitating sustainable planned development of member country destinations are alternative strategies particularly amid Covid-19. Unfortunately, despite Covid-19 being a major crisis, OIC countries have already been facing various other crises besides the past epidemics, including political conflicts, terrorist events, natural disasters, etc. Hence, OIC also

¹ “Safe travel corridors” or “travel bubbles” are tourist movement designs and processes that minimize local interaction, helping tourists stay isolated for the duration of the whole trip starting from the airport and returning, thus limiting possible spread because of tourism activity. It also includes relaxation of border restrictions among countries with similar infection rates.

needs to prepare and establish risk and crises management procedures to create a more immune and competitive tourism industry.

This is also a period of investment and capacity building and work-out long-standing problems within OIC tourism. Among these problems are low service quality, low per capita tourist spending and leakages from local economies. The tourism industry in the OIC has been developing at a rapid pace. Yet, the increase in income generated in tourism is well below the growth rate in the volume. Therefore, OIC tourism is not able to reflect the volume increase in per capita spending. The average tourist spending was around 750 USD below the crises, which is well below the global average of 1,000 USD. Yet, Covid-19 succeeded to increase per tourist spending to 985 USD in 2020 in OIC countries. Hence, if member countries invest in tourism service quality and try planning the disturbed balance between tourism supply and demand in a sustainable manner, and eliminate bad apples by supporting good practices, there are also some opportunities.

One reason for this low per capita spending is the scarcity of tourism activities and low quality of services. Because of limited human and financial capital, OIC countries tend to import know-how in the form of franchises. Despite international brands and management firms enhancing the service quality, they also create substantial leakages from the economy in profits and commissions transferred to the franchisor, foreign staff wages and management fees. One way to solve these obstacles is by encouraging tourism entrepreneurship and building local entrepreneurship capacities.

Considering the modest share of the OIC Member Countries in the international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself at desirable levels. The OIC Member States need to understand how they can strengthen the position of their tourism industry in response to current global economic challenges and remain competitive among emerging destinations within a sustainable development perspective. Enhancing intra-OIC travel, creating travel bubbles between countries, encouraging domestic tourism and family travel, subsidizing tourism for a more resilient industry, investing in collaborative planning, crisis management, and branding are among other strategies to support the tourism industry. This period can also be seen as an opportunity to fix structural problems in the industry concerning sustainability, over-tourism, climate change, and destination governance.

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Research Interview Form

This study aims to evaluate the impacts of Covid-19 on the tourism industry, offer analytical recovery strategies and measure efficiency of government support. It is expected from the participants to provide in-depth feedback. The first part of the interview contains demographic information while the second part includes research questions. Your opinions will be kept anonymous and will only be used for research purposes without any personal identification.

This research is conducted based on “**Tourism Mitigation Strategies amid Covid-19 in OIC Countries**” funded by COMCEC.

1- DEMOGRAPHIC QUESTIONS

- ❖ - Your Position and Experience in the industry:
- ❖ - Establishment year of the organization:
- ❖ - Number of employees before Covid-19:
- ❖ - Number of rooms (if applicable):
- ❖ - 2019 annual revenues (approximately):
- ❖ - What is the main product of your facility? What are your supporting products and services?
- ❖ - What is the profile of your guests and their countries? (From which countries and with what motivations do they travel?)

2- RESEARCH QUESTIONS

1. Can you talk about the impacts of Covid-19 in business? The impact on occupancy / ADR / total sales /number of employees? Can you compare percentage change before (e.g. 2019) and after the pandemic (e.g. 2020)?
2. How long do you think it will take to fully recover from Covid-19? When do you think your business will be able to reach the pre-Covid (e.g. 2019) numbers?
3. Which type of organizations have a higher possibility of surviving Covid-19, why? What kind of different impacts Covid-19 can have on businesses based on the following features? (For instance; small hotels are affected more, because.....).
 - a. Products
 - b. Scale of organization,

- c. Facilities of the business,
 - d. Branding,
 - e. Target Markets,
 - f. Ownership type (e.g. chain, franchise, independent)
 - g. Location,
 - h. Cost Structure
 - i. Other
4. What are the short and long term strategies of your organization to reduce the effects of Covid-19? What are you planning to do in order to make your business more resistant against similar crises in the future?
 5. What kind of transformations do you foresee both in your organization and tourism industry when the crisis is over? When the Covid-19 pandemic is over, what kind of changes are you planning to implement (e.g. products/services, operational processes, human resources, prices, distribution, marketing processes) in order to reduce the effects of Covid-19 and prevent similar future crises?
 6. What kind of opportunities might occur after Covid-19? What type of opportunities might emerge for different kinds of organizations? What are the post crisis recovery indicators?
 7. What is the role of the government in reducing the effects of crises in the short and long term? Are you satisfied with the current policies of the government for Covid-19 pandemic? In this sense, how do you evaluate the external support made available by the government? Do you believe these attempts are effective, in what ways these recovery measures can be enhanced? What else could be done to help tourism organizations to survive and adopt? Can you compare the current strategies and tools to support the tourism industry with the supports made available for other/former crises?

TOURISM INDUSTRY COVID-19 SURVEY

1- Organizational Characteristics							
Country of origin							
Number of employees							
Established in (Please state the year)							
Type of organization			Accommodation & lodging Services ()				
			Tour Operation & Transport Services ()				
			Food & Catering Services ()				
			Other _____				
2- Please think of the geographic and motivational market segments and indicate your predictions about the percentage change in the following segments before and after the Covid-19 crisis (in percentages) Please indicate the decrease in volume with a minus (-) (e.g. -10) and increase with a plus (+) (e.g. +10).							
Geographic Markets		before (%)	after (%)	Motivational		before (%)	after (%)
1) Asia & Pacific				1. Shopping Tourism			
2) Europe				2. Culture Tourism			
3) CIS Countries				3. Business Travel and MICE			
4) South America				4. Cruise and Sea Tourism			
5) North America				5. Nature-based Tourism			
6) Middle East & Gulf				6. Gastronomy and Entertainment			
7) Domestic Market				7. Health Tourism			
8) Total Sales				8. Sport Tourism			
3- Effects and Open-ended Expressions							
1. Compared to pre-Covid (e.g. 2019) please indicate how much decline you have experienced amid Covid-19 crises (in percentages) Revenues ___% / # of customers ___% / average prices ___% / number of employees ___% ?							
2. Considering the current market conditions, how long (in months) can you continue your operations without any financial help? _____							
3. Considering the destination, you operate in, how much decline (in percentages) have you experienced in the destination concerning the number of visitors compared to pre-Covid period (e.g. 2019)? _____% decline.							

4. What opportunities might emerge after Covid-19? What should be done to create competitive advantage after crisis? _____					
5. What should be done to manage the crisis more effectively on destination and business levels in short-mid-long term? _____					
4- What are the features of a Covid-19 resilient tourism organizations? Please indicate your level of agreement with each statement, using the scale ranging from 1 = Strongly Disagree to 5 = Strongly Agree.					
Capacity is lower	(1)	(2)	(3)	(4)	(5)
Fixed costs are higher	(1)	(2)	(3)	(4)	(5)
Variable costs are higher	(1)	(2)	(3)	(4)	(5)
Paid-in capital is higher	(1)	(2)	(3)	(4)	(5)
Organization's Buildings are rental	(1)	(2)	(3)	(4)	(5)
Has the right location	(1)	(2)	(3)	(4)	(5)
Cares about service quality	(1)	(2)	(3)	(4)	(5)
Owns a strong brand	(1)	(2)	(3)	(4)	(5)
Part of a chain	(1)	(2)	(3)	(4)	(5)
Has more loyal guests	(1)	(2)	(3)	(4)	(5)
Competes based on price	(1)	(2)	(3)	(4)	(5)
Operates as a family business	(1)	(2)	(3)	(4)	(5)
Competes based on product quality	(1)	(2)	(3)	(4)	(5)
Offers diversified services and products	(1)	(2)	(3)	(4)	(5)
Adopts Information and Communication Technologies	(1)	(2)	(3)	(4)	(5)
Targets domestic markets	(1)	(2)	(3)	(4)	(5)
Targets business travelers	(1)	(2)	(3)	(4)	(5)
Targets leisure tourists	(1)	(2)	(3)	(4)	(5)
5- Which organizational strategies are likely to be successful amid Covid-19? Please indicate your level of agreement with each statement, using the scale ranging from 1 = Strongly Disagree to 5 = Strongly Agree.					
Improving marketing activities	(1)	(2)	(3)	(4)	(5)
Offering new products and services	(1)	(2)	(3)	(4)	(5)
Decreasing prices	(1)	(2)	(3)	(4)	(5)
Decreasing costs	(1)	(2)	(3)	(4)	(5)
Decreasing quality	(1)	(2)	(3)	(4)	(5)
Decreasing capacity	(1)	(2)	(3)	(4)	(5)
Enhancing service quality	(1)	(2)	(3)	(4)	(5)
Market diversification / Targeting different markets	(1)	(2)	(3)	(4)	(5)
Merging with other organizations	(1)	(2)	(3)	(4)	(5)
Relaxing cancellation policies	(1)	(2)	(3)	(4)	(5)
Investing in employee training	(1)	(2)	(3)	(4)	(5)
Focusing on ICT and automation	(1)	(2)	(3)	(4)	(5)
Postponing investments	(1)	(2)	(3)	(4)	(5)
Corporate Social Responsibility activities	(1)	(2)	(3)	(4)	(5)
Applying for financial support	(1)	(2)	(3)	(4)	(5)
Enhancing cleanliness and hygiene standards	(1)	(2)	(3)	(4)	(5)
Enhancing travel insurance policies	(1)	(2)	(3)	(4)	(5)
Restructuring debts	(1)	(2)	(3)	(4)	(5)
Decreasing number of employees	(1)	(2)	(3)	(4)	(5)
Liquidations, selling operations and business	(1)	(2)	(3)	(4)	(5)
Creating safety image	(1)	(2)	(3)	(4)	(5)
Enhancing loyalty programs	(1)	(2)	(3)	(4)	(5)

6- The statements below describe the efficiency of government support against crisis. Please indicate your level of agreement or disagreement with each statement, using the scale ranging from 1 = Not important at all to 5 = Extremely important.					
Support aimed at facilitating demand					
Holiday credits	(1)	(2)	(3)	(4)	(5)
Extended bank holidays	(1)	(2)	(3)	(4)	(5)
Destination promotion	(1)	(2)	(3)	(4)	(5)
International lobbying activities and diplomacy	(1)	(2)	(3)	(4)	(5)
Financial support					
Tax holidays and discounts	(1)	(2)	(3)	(4)	(5)
Subsidized credits	(1)	(2)	(3)	(4)	(5)
Exchange rate policy	(1)	(2)	(3)	(4)	(5)
Seat support for flights	(1)	(2)	(3)	(4)	(5)
Rent support	(1)	(2)	(3)	(4)	(5)
Deferrals of utility (water, energy) charges	(1)	(2)	(3)	(4)	(5)
Accelerated depreciation	(1)	(2)	(3)	(4)	(5)
Renovation support	(1)	(2)	(3)	(4)	(5)
Digitalization and automation support	(1)	(2)	(3)	(4)	(5)
Advance public purchase of travel services to be used by government later	(1)	(2)	(3)	(4)	(5)
Supports to maintain and train workforce					
Salary contributions	(1)	(2)	(3)	(4)	(5)
Wage subsidies	(1)	(2)	(3)	(4)	(5)
Reduced social security contributions	(1)	(2)	(3)	(4)	(5)
Training support	(1)	(2)	(3)	(4)	(5)
Suspension of layoffs	(1)	(2)	(3)	(4)	(5)
Legislative Actions					
Government guarantees on loans	(1)	(2)	(3)	(4)	(5)
Holiday insurances	(1)	(2)	(3)	(4)	(5)
Vaccine passport	(1)	(2)	(3)	(4)	(5)
Cancellation refund delays	(1)	(2)	(3)	(4)	(5)
Operational Processes					
Safe tourism certification	(1)	(2)	(3)	(4)	(5)
Medical support services	(1)	(2)	(3)	(4)	(5)
Hygiene and capacity audits	(1)	(2)	(3)	(4)	(5)
Safe travel bubbles	(1)	(2)	(3)	(4)	(5)
Vaccination priority for tourism staff	(1)	(2)	(3)	(4)	(5)
Advisory and information provision services	(1)	(2)	(3)	(4)	(5)
7- Please indicate how tourism industry will shape after Covid-19 using the scale ranging from 1 = Very unlikely to 5 = Very likely					
Per person costs will increase	(1)	(2)	(3)	(4)	(5)
Capacity will decrease	(1)	(2)	(3)	(4)	(5)
Price based competition will increase.	(1)	(2)	(3)	(4)	(5)
Quality based competition will increase.	(1)	(2)	(3)	(4)	(5)
Number of intermediaries will decrease.	(1)	(2)	(3)	(4)	(5)
Utilizing external services (Outsourcing) will decrease.	(1)	(2)	(3)	(4)	(5)
The impact of brand image will increase.	(1)	(2)	(3)	(4)	(5)
Usage of external service providers (subcontractors) will increase	(1)	(2)	(3)	(4)	(5)
Customized services will gain more importance.	(1)	(2)	(3)	(4)	(5)
Number of employees per unit (e.g. room, seat, tour) will increase.	(1)	(2)	(3)	(4)	(5)
Quality HR will become harder to attract in tourism.	(1)	(2)	(3)	(4)	(5)
Demand for small-size family hotels will increase.	(1)	(2)	(3)	(4)	(5)
Service automation and robots will be increasingly used in service production and delivery.	(1)	(2)	(3)	(4)	(5)

Pandemic Hygiene standards will be permanent.	(1)	(2)	(3)	(4)	(5)
Travel insurances will be more popular.	(1)	(2)	(3)	(4)	(5)
Investments will decrease.	(1)	(2)	(3)	(4)	(5)
8- The statements below describe the importance of government support against crisis. Please indicate your level of agreement or disagreement with each statement, using the scale ranging from 1 = Not important at all to 5 = Very important.					
Safe Travel certification	(1)	(2)	(3)	(4)	(5)
Hygiene & Capacity Audits	(1)	(2)	(3)	(4)	(5)
Vaccination priority for tourism staff	(1)	(2)	(3)	(4)	(5)
Advisory and information provision services	(1)	(2)	(3)	(4)	(5)
Medical Support Services	(1)	(2)	(3)	(4)	(5)
Tax holidays and discounts	(1)	(2)	(3)	(4)	(5)
Subsidized credits	(1)	(2)	(3)	(4)	(5)
Seat support for flights	(1)	(2)	(3)	(4)	(5)
Rent support	(1)	(2)	(3)	(4)	(5)
Deferrals of utility (water, energy) charges	(1)	(2)	(3)	(4)	(5)
Accelerated depreciation	(1)	(2)	(3)	(4)	(5)
Renovation	(1)	(2)	(3)	(4)	(5)
Digitalization and upgrading support	(1)	(2)	(3)	(4)	(5)
Advance public purchase of travel services (e.g. airline tickets)	(1)	(2)	(3)	(4)	(5)
Salary contributions	(1)	(2)	(3)	(4)	(5)
Wage subsidies	(1)	(2)	(3)	(4)	(5)
Reduced social security contributions	(1)	(2)	(3)	(4)	(5)
Training support	(1)	(2)	(3)	(4)	(5)
Suspension of layoffs	(1)	(2)	(3)	(4)	(5)
Government guarantees on loans	(1)	(2)	(3)	(4)	(5)
Holiday insurances	(1)	(2)	(3)	(4)	(5)
Vaccine passport	(1)	(2)	(3)	(4)	(5)
Cancellation refund delays	(1)	(2)	(3)	(4)	(5)
Government holiday vouchers	(1)	(2)	(3)	(4)	(5)
Holiday credits	(1)	(2)	(3)	(4)	(5)
Extended bank holidays	(1)	(2)	(3)	(4)	(5)
Destination promotion	(1)	(2)	(3)	(4)	(5)
International lobbying activities	(1)	(2)	(3)	(4)	(5)
9- Open-ended Questions					
What opportunities might emerge after Covid-19? What should be done to create competitive advantage after crisis? Please write your comments below.					
What should be done to manage the crisis more effectively on destination and business levels in short-mid-long term? Please write your comments below.					