



TOURISM MITIGATION STRATEGIES AMID COVID-19 IN OIC COUNTRIES



COMCEC COORDINATION OFFICE
Prepared by: Assoc.Prof. Dr. Gurel Cetin

RISK AND CRISES MANAGEMENT IN TOURISM

Tourism is perishable and can not be stored.

Tourism spending is discretionary and can be postponed.

Amalgam of services and products, requires a collective response.

Industry structure; large fixed costs.

Tourism is frequently labeled as the scape goat during crises.



EPIDEMICS AS TOURISM CRISES

SARS, MERS, H1N1, Ebola

Globalization and connections;

Spread

Border restrictions

Quarantine – Lock Downs

Human Interaction and mobility

Inseparability

CHARACTERISTICS OF COVID-19 AS TOURISM CRISES

Rapid spread to global level

Severity of its volume

Duration

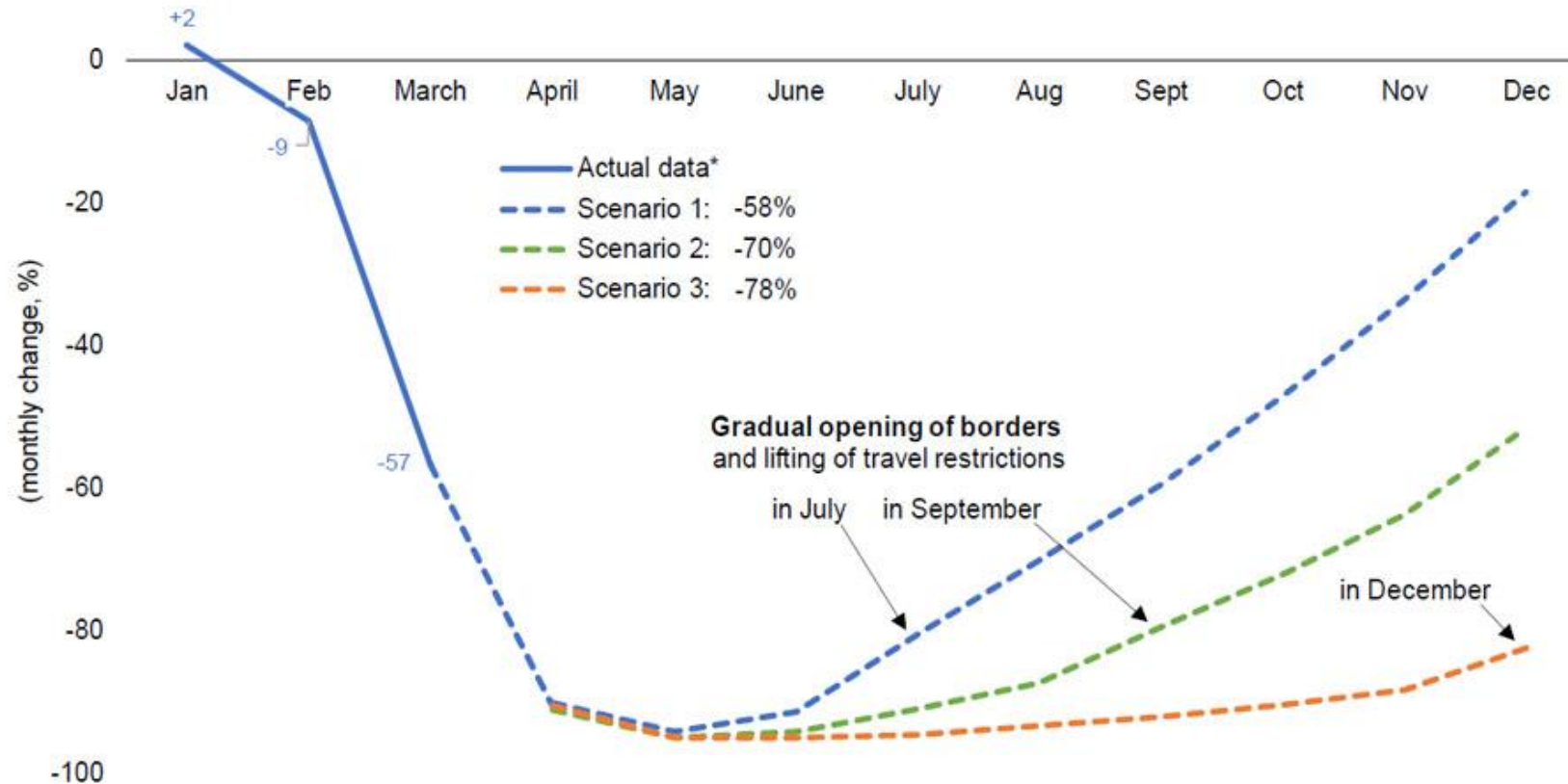
Uncertainty (re-lockdowns, mutations)

Socio-economic impacts

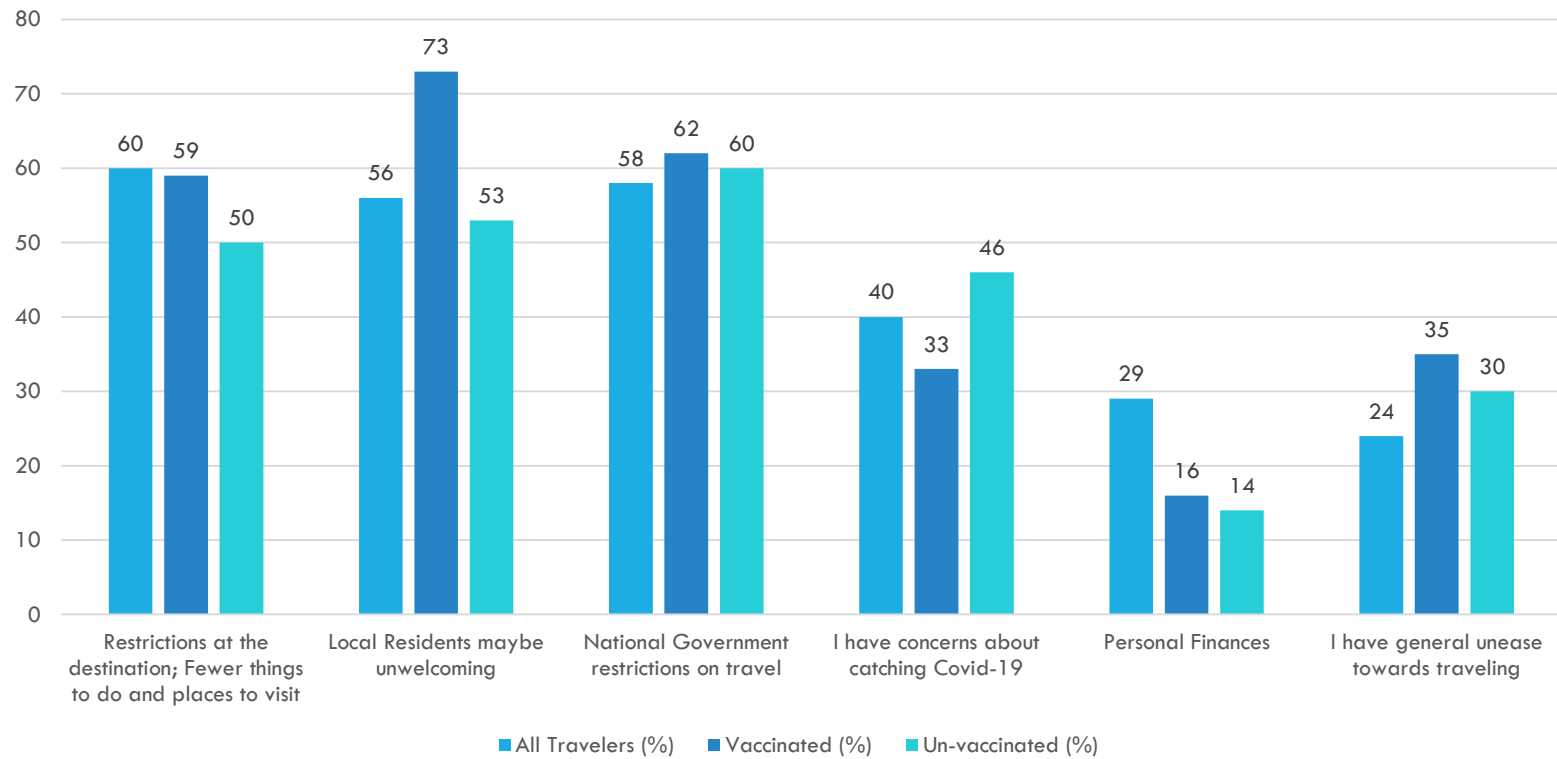
Transformation and adoption

Government intervention

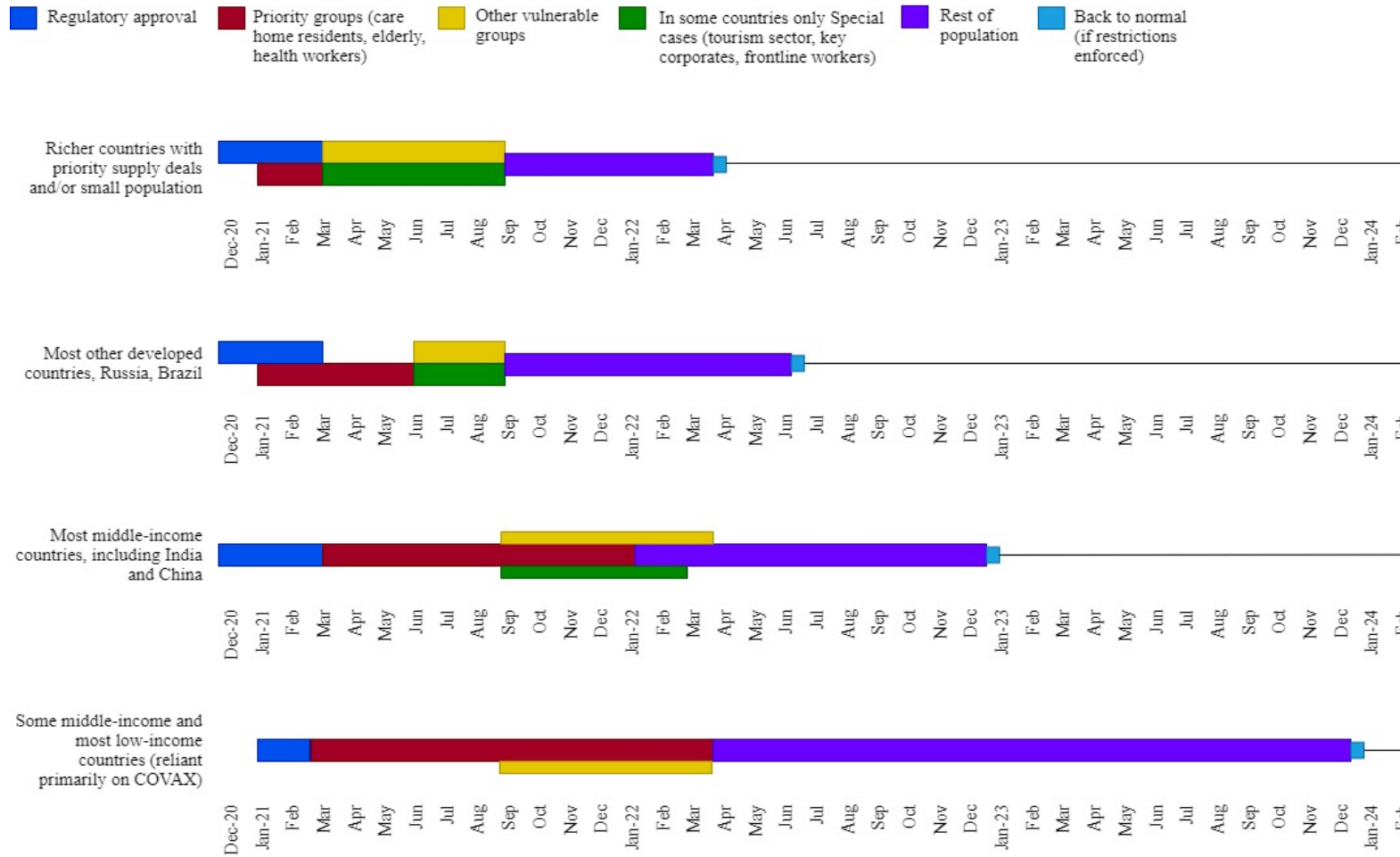
IMPACTS OF COVID-19 ON GLOBAL TOURISM



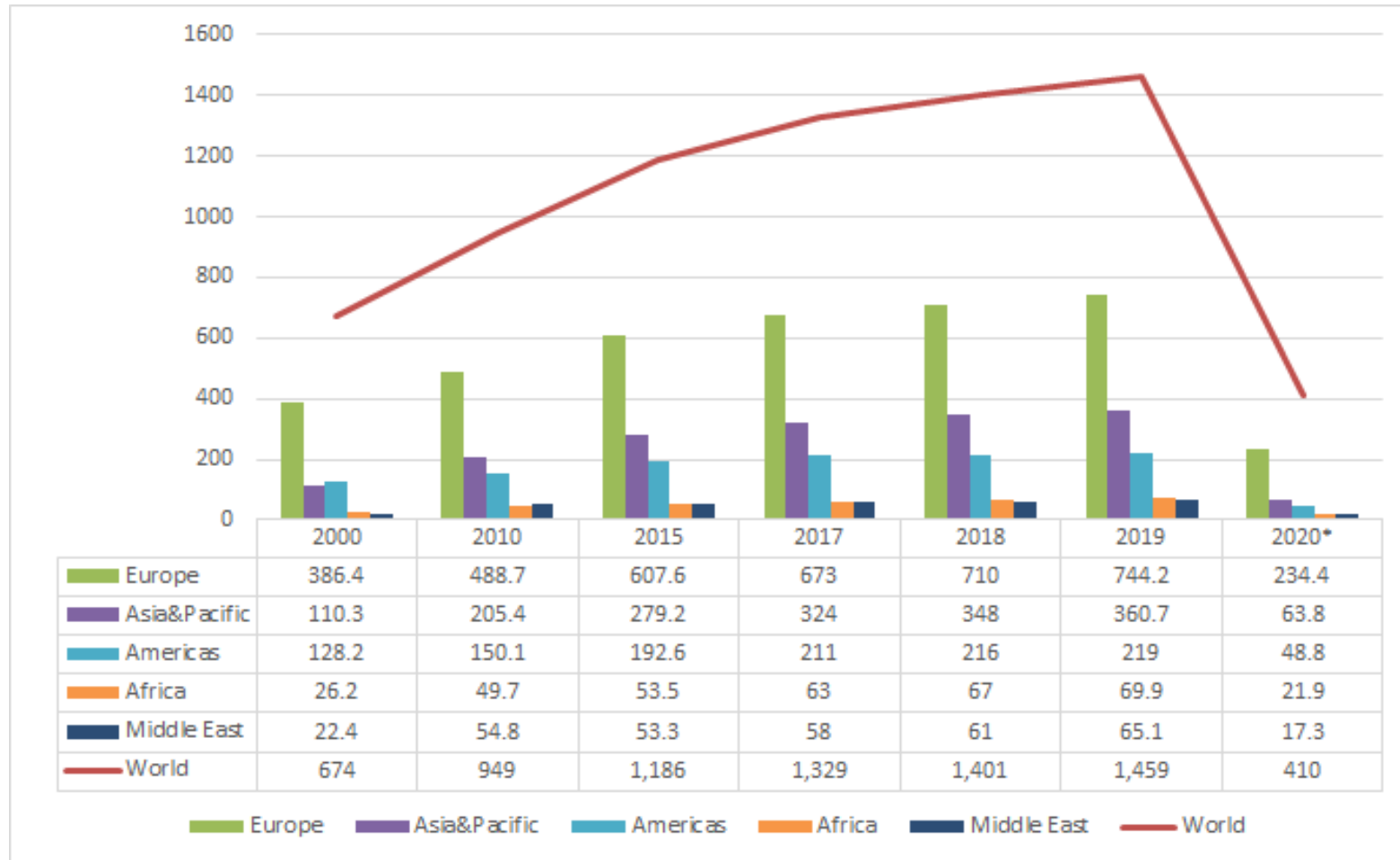
RECOVERY SCENERIOS - BOOM



RECOVERY SCENERIOS - GRADUAL



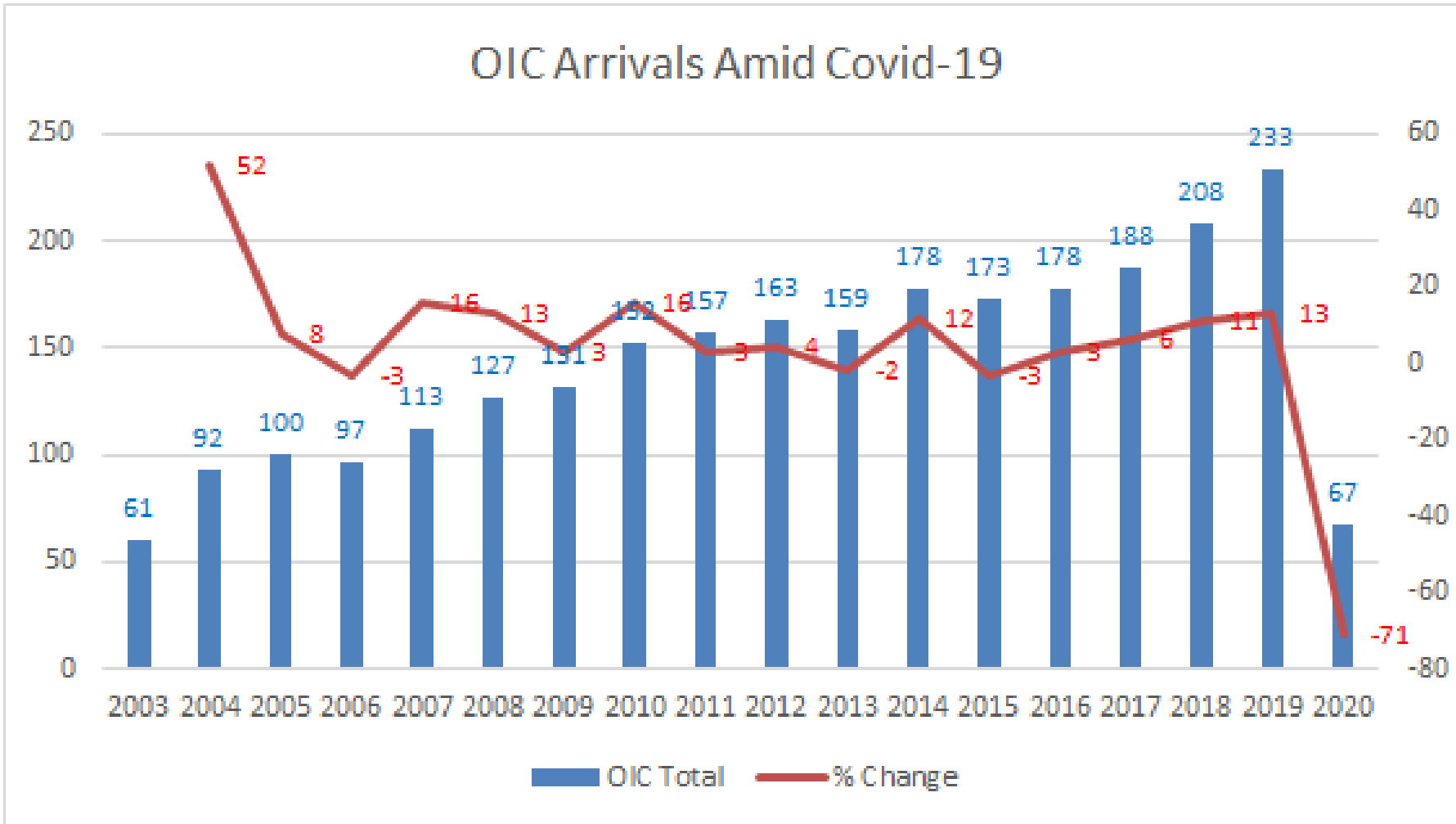
COVID-19 IMPACT ON GLOBAL TOURISM



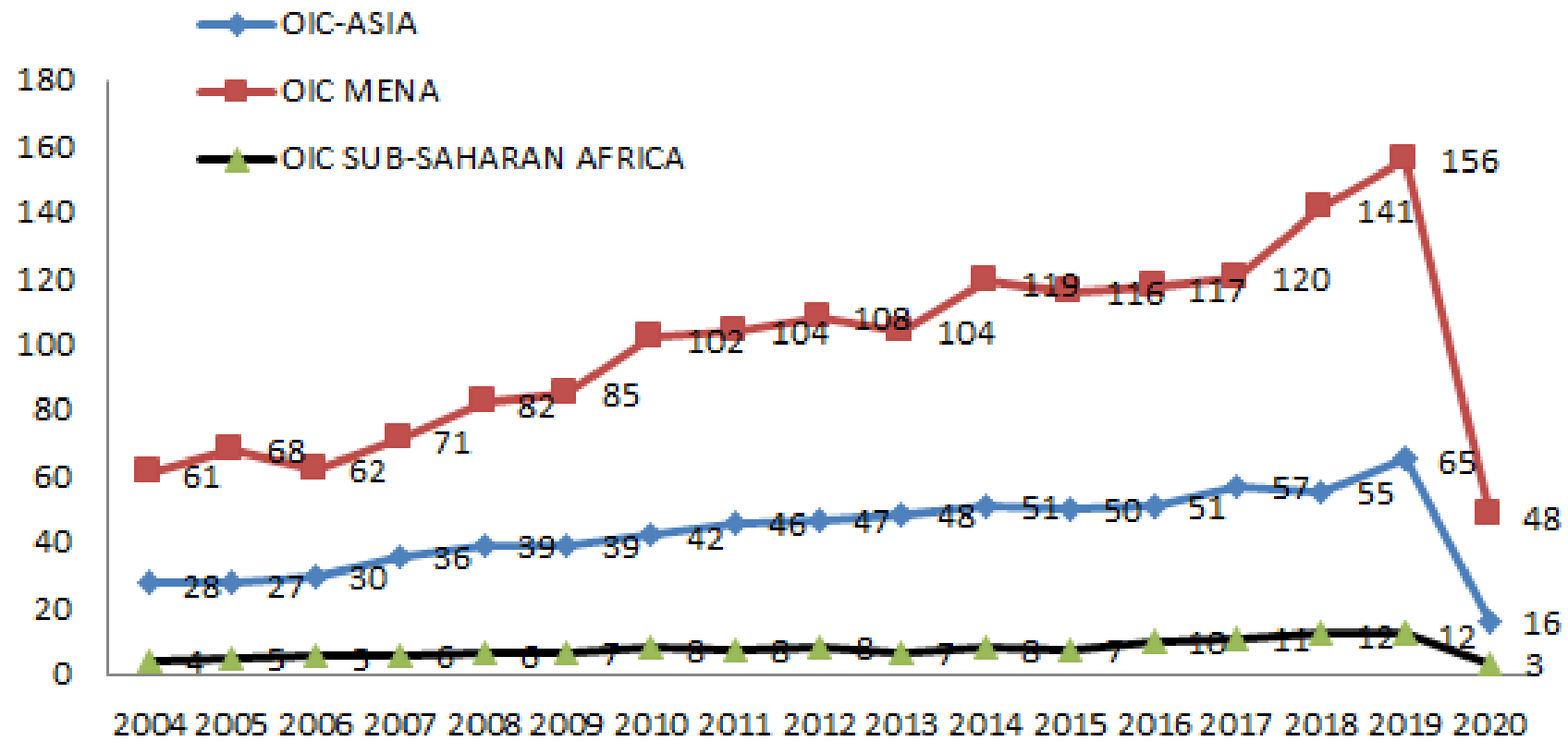
GLOBAL AND REGIONAL TOURISM

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

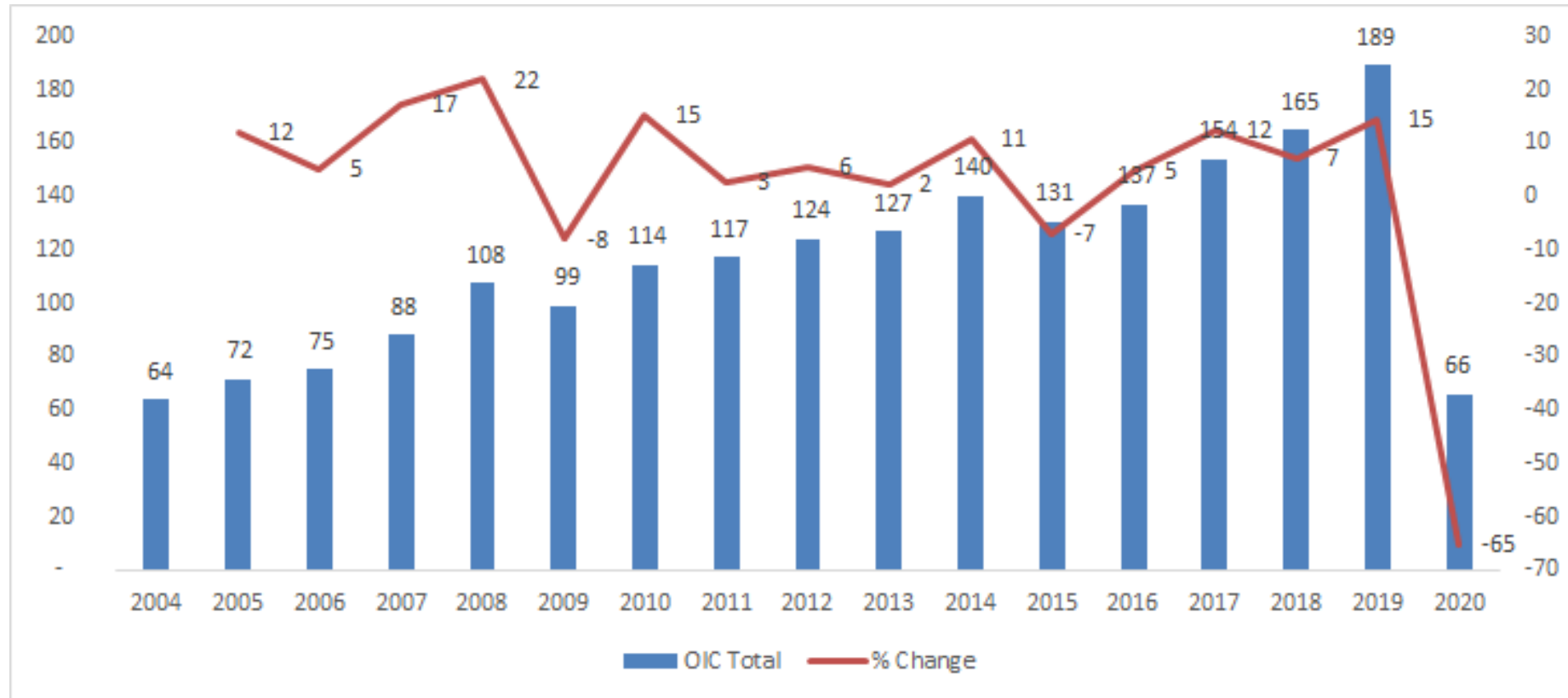
IMPACTS OF COVID-19 ON OIC TOURISM



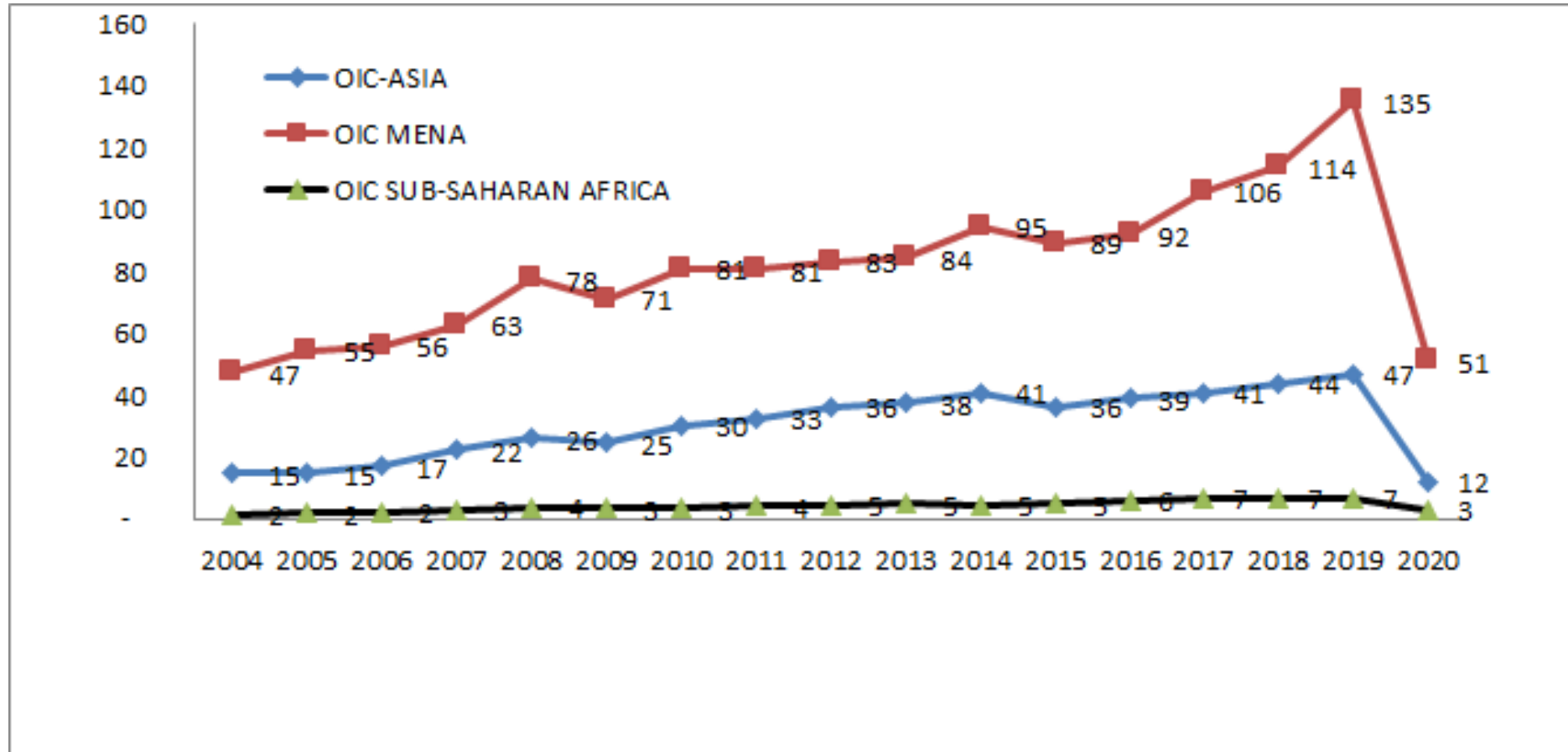
REGIONAL OIC ARRIVALS



OIC TOURISM RECEIPTS



REGIONAL OIC TOURISM RECEIPTS



MITIGATION STRATEGIES

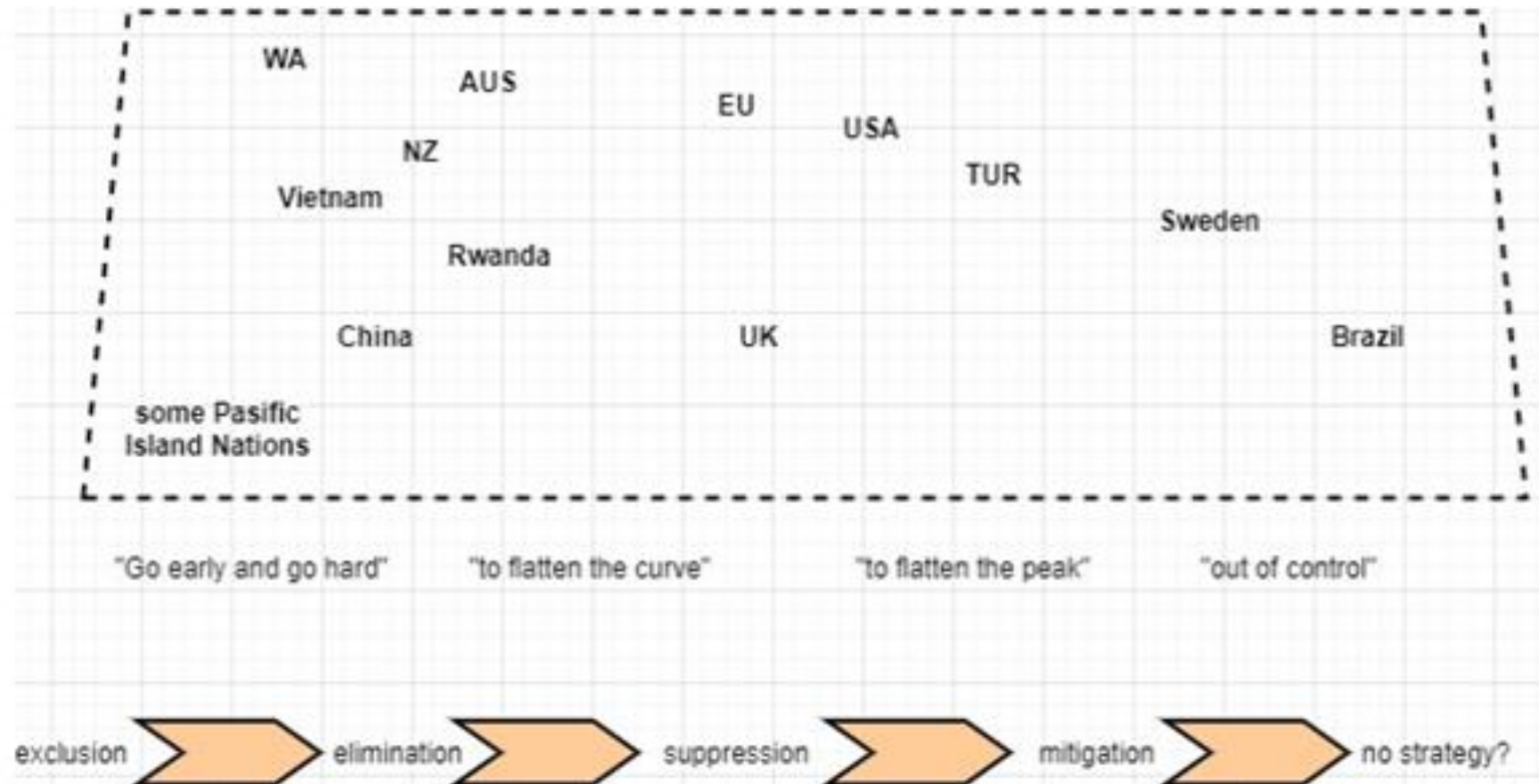
Collective and coordinated response

- Governments
- Private Sector

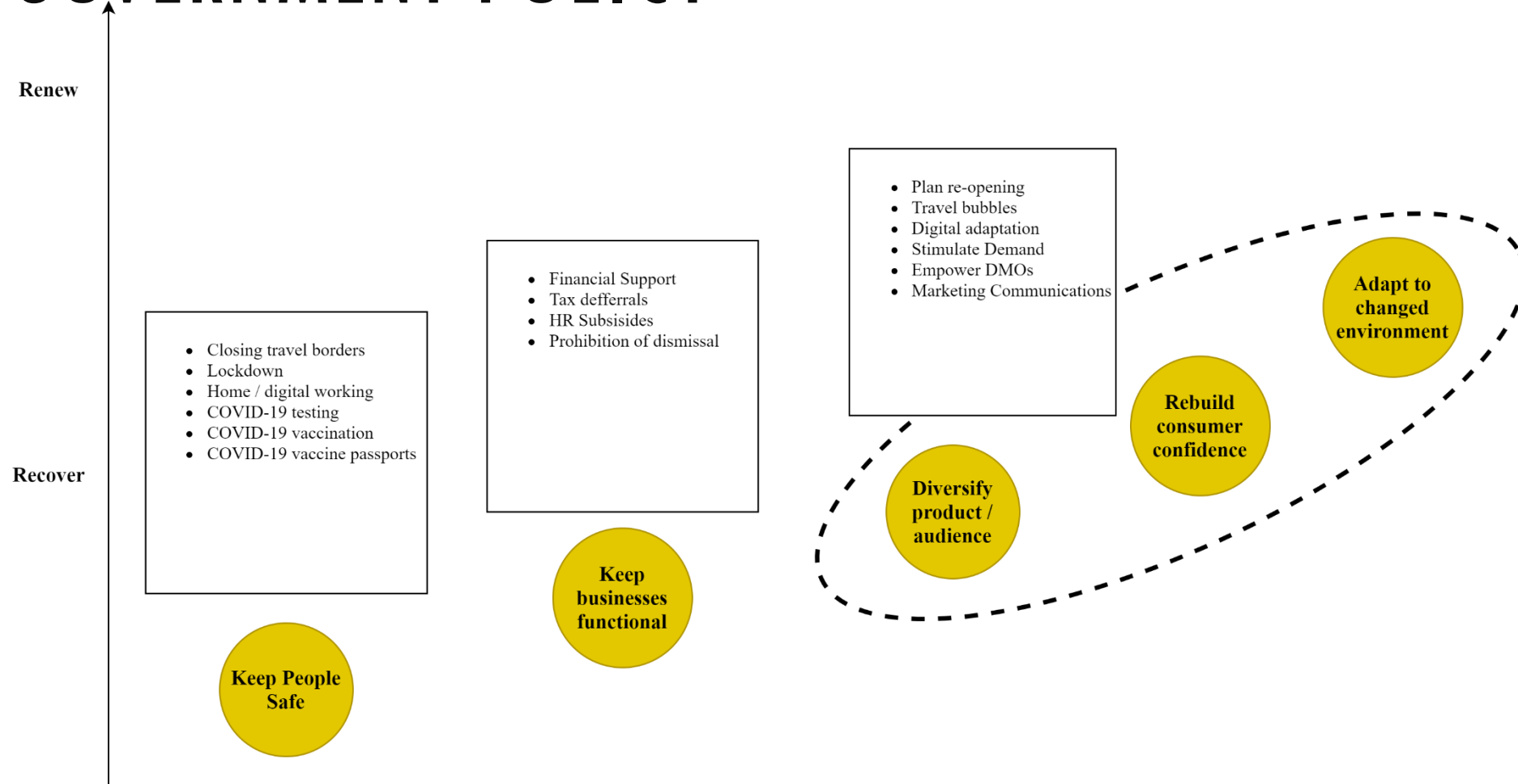
Features of response

- Structure of Tourism (e.g. dependency, SMEs)
- Level of Pandemic
- Health Infra-structure
- Vaccination, immunity levels
- Economy

GOVERNMENT MITIGATION STRATEGIES



GOVERNMENT POLICY



GENERIC GOVERNMENT MEASURES

- Fight with virus
- Protect Citizens
- Support Economy
 - Reliefs / Deferrals
 - Credits
 - HR Support
 - Investment support

TOURISM SPECIFIC GOVERNMENT SUPPORT

Financial

- Tourism specific credits and subsidies, wage support

Operational

- Tourist bubbles, sanitation, committees, infra-structural investments

Stimulating Demand

- Promotion, vouchers

Legal

- Postponing cancellation refunds, certification, accelerated depreciation

PRIVATE SECTOR MITIGATION STRATEGIES

Reducing costs

- Limiting services and capacities

Operational

- Hygiene standards, cancellation policies, ICT

Marketing

- Promotion, diversification

Financial

- Debt restructuring, government support, Postponed investments



TRANSFORMATIONS FACING TOURISM

New expectations

New standards

Alteration in markets and products

Automation

Importance of domestic tourism

Importance of Collaboration and destination governance



MITIGATION IN TURKEY AND POLICY RECOMMENDATIONS FOR OIC COUNTRIES

COMCEC COORDINATION
OFFICE

Prepared by: Assoc.Prof. Dr.
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CASE COUNTRY METHODOLOGY

Objectives

- Identify the impact of Covid-19 on tourism industry
- Explore private sector crises management strategies
- Identify government mitigation strategies and measure their effectiveness
- Examine transformation in tourism amid Covid-19
- Describe features of crises resilient organizations

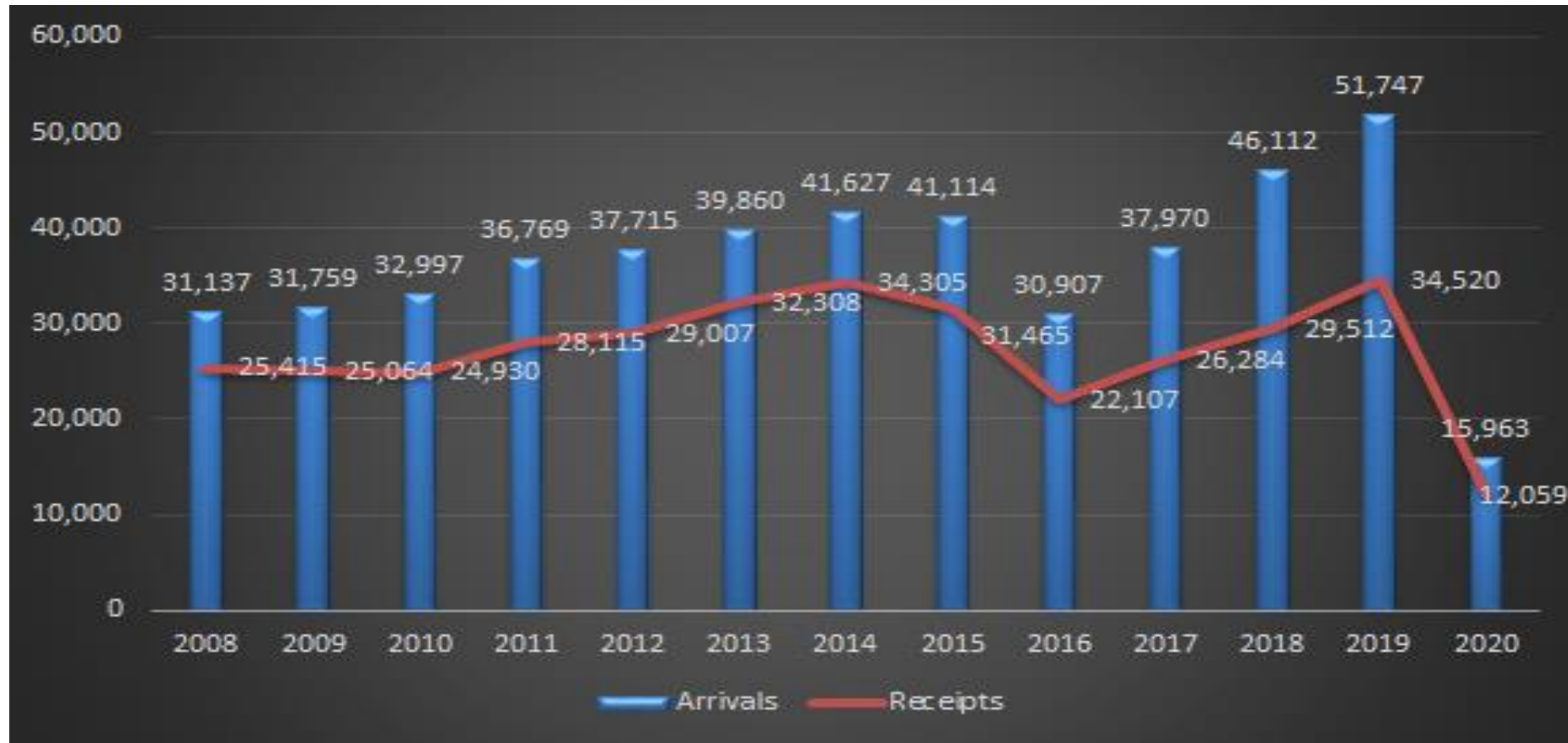
Case Countries

- Qualitative Analysis
 - Interviews with tourism stakeholders
- Quantitative Analysis
 - Surveys with tourism stakeholders

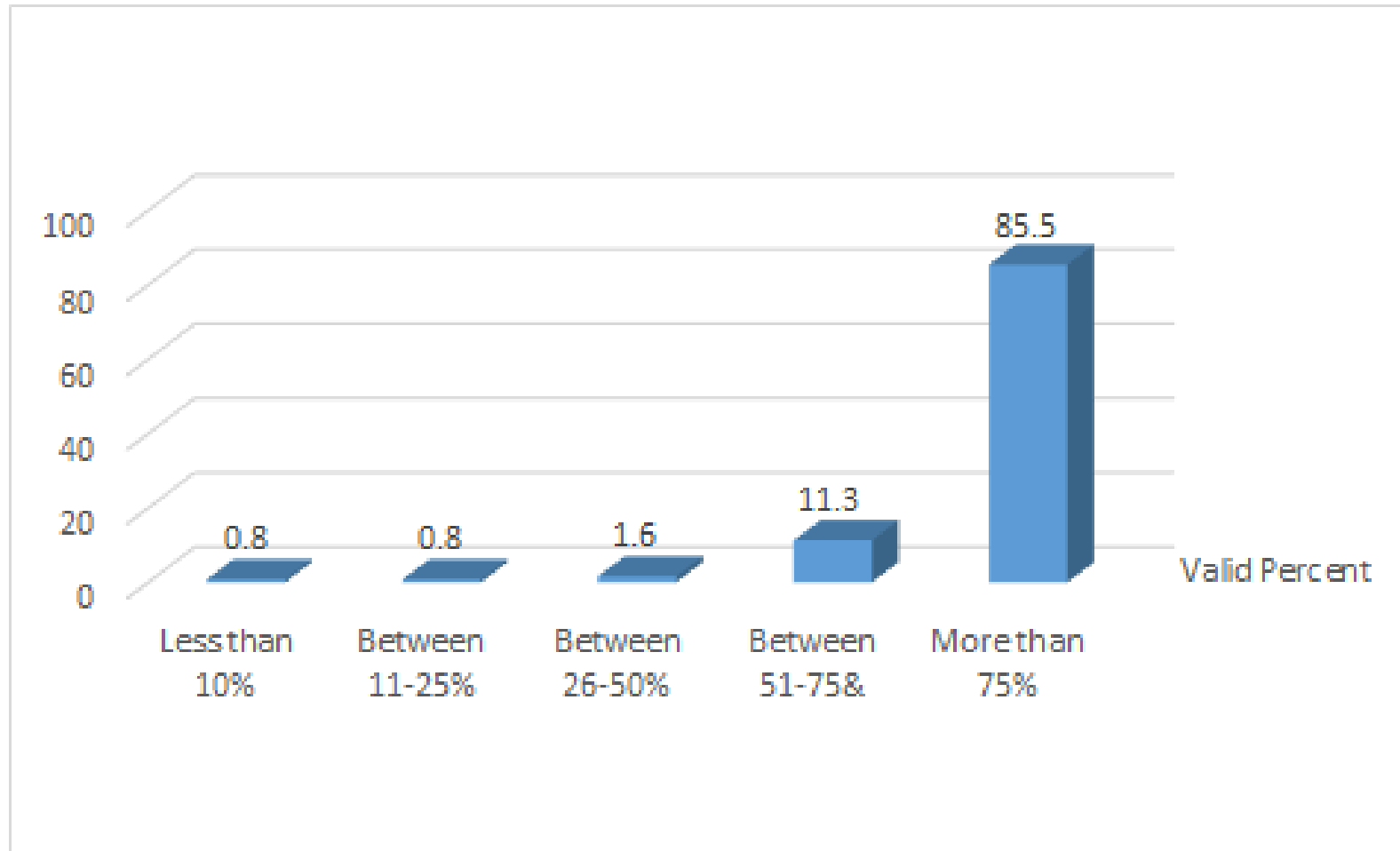
THE TURKISH CASE

- Global destination
- 9% of employment and 12% of GDP
- Crises & Risk Management
 - Tourism Industry Resiliency
 - Government Incentives
 - Product & Market Diversification

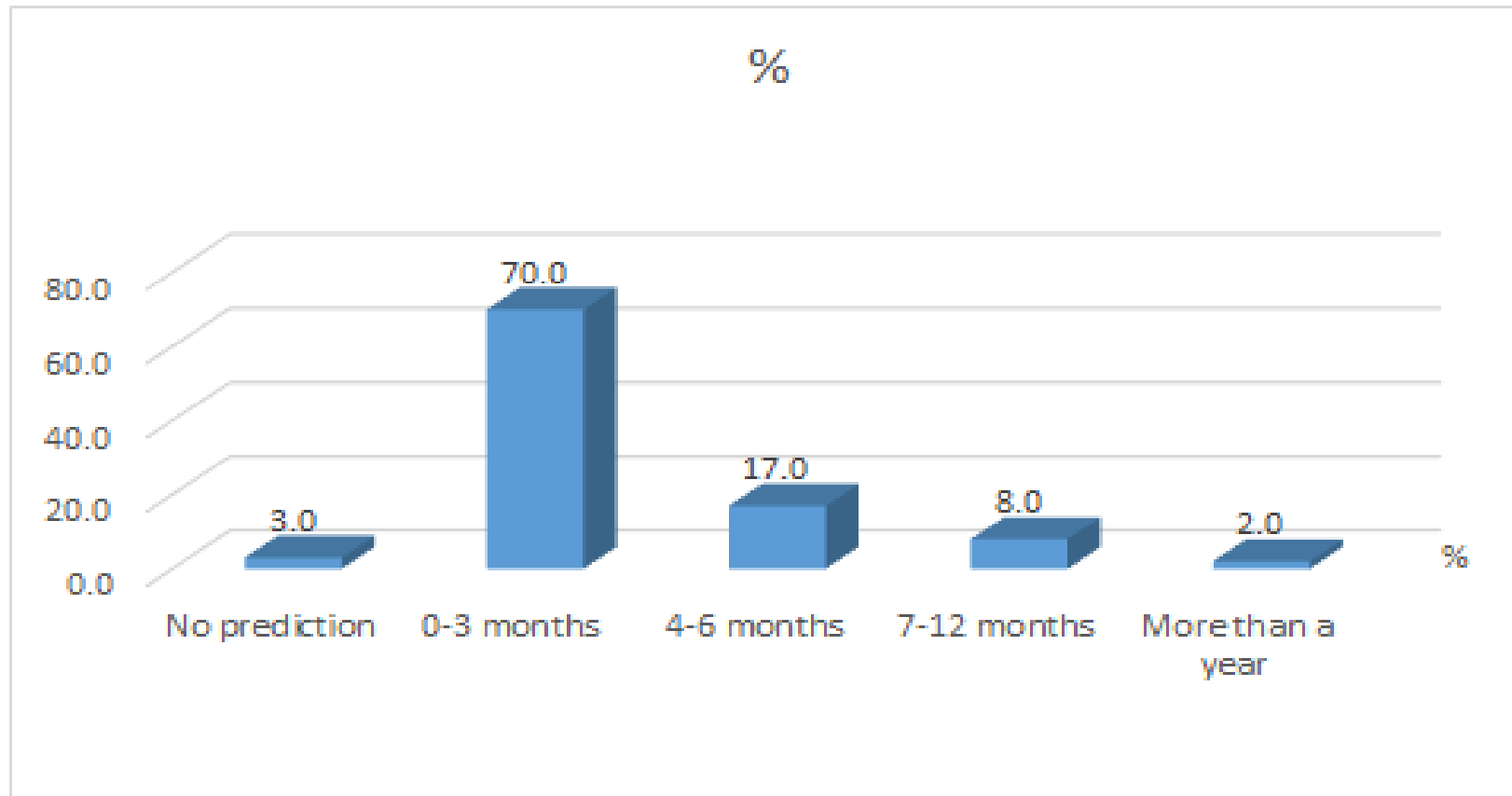
IMPACTS COVID-19



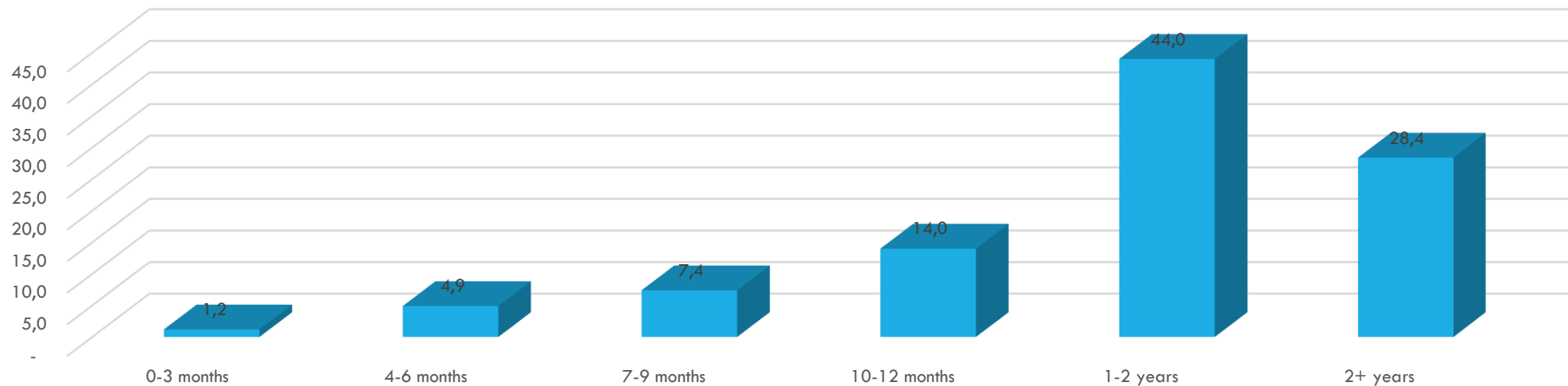
REVENUE LOSS IN TOURISM INDUSTRY



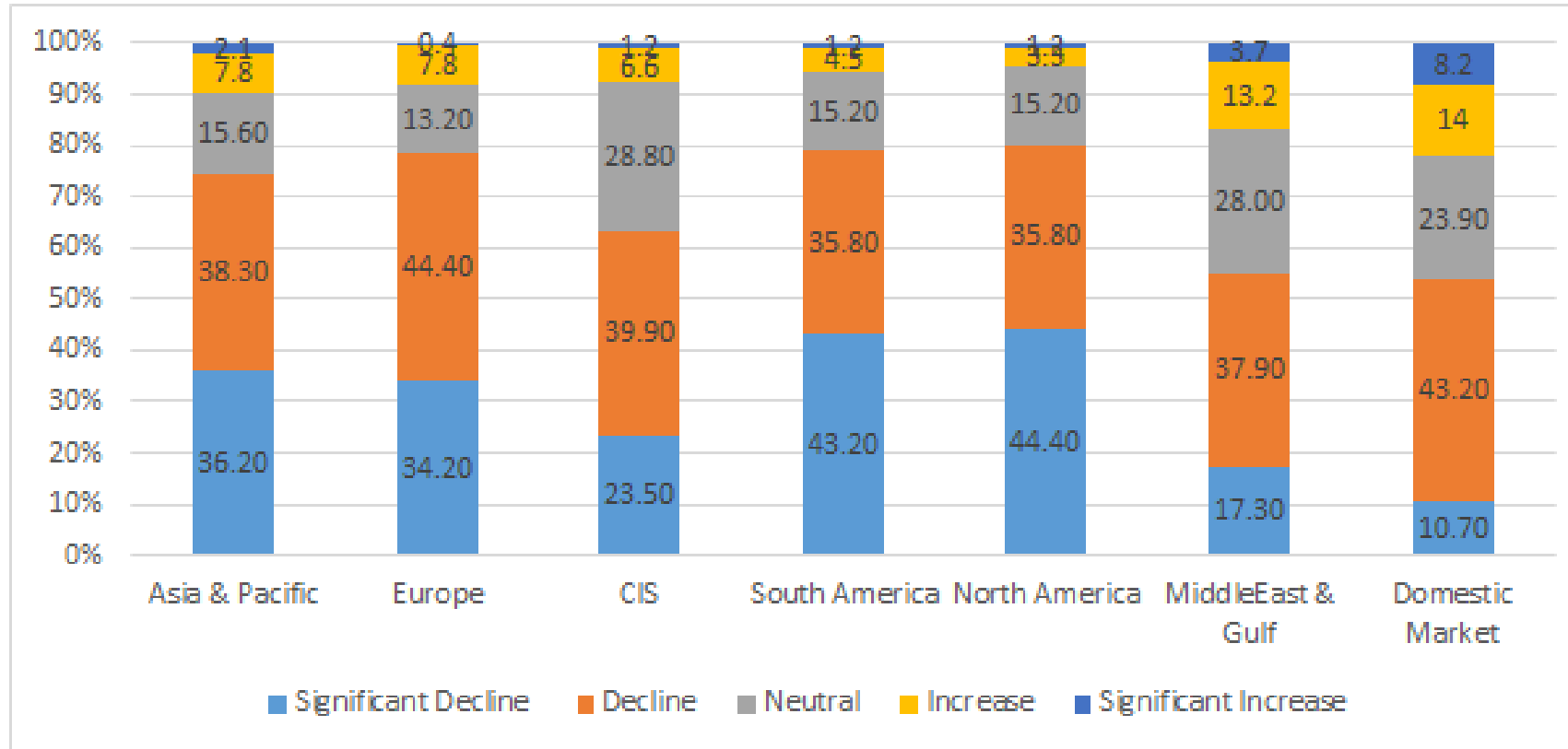
SURVIVAL OF TOURISM INDUSRTY



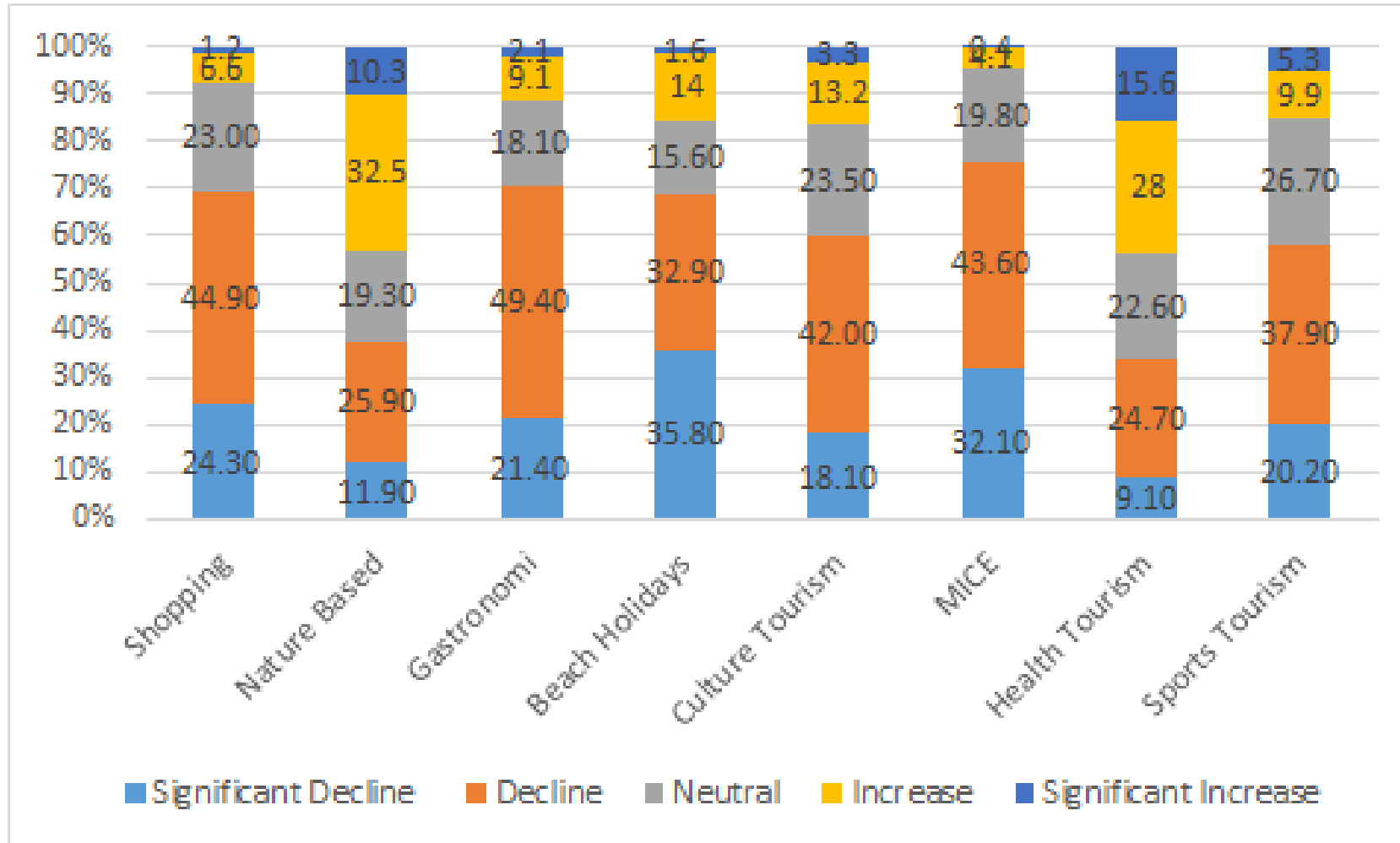
RECOVERY TO PRE-COVID VOLUME



TRANSFORMATION IN MARKETS



TRANSFORMATIONS IN TRAVEL MOTIVATIONS





GOVERNMENT STRATEGIES

Short-term work allowance

Tax reduction and deferrals

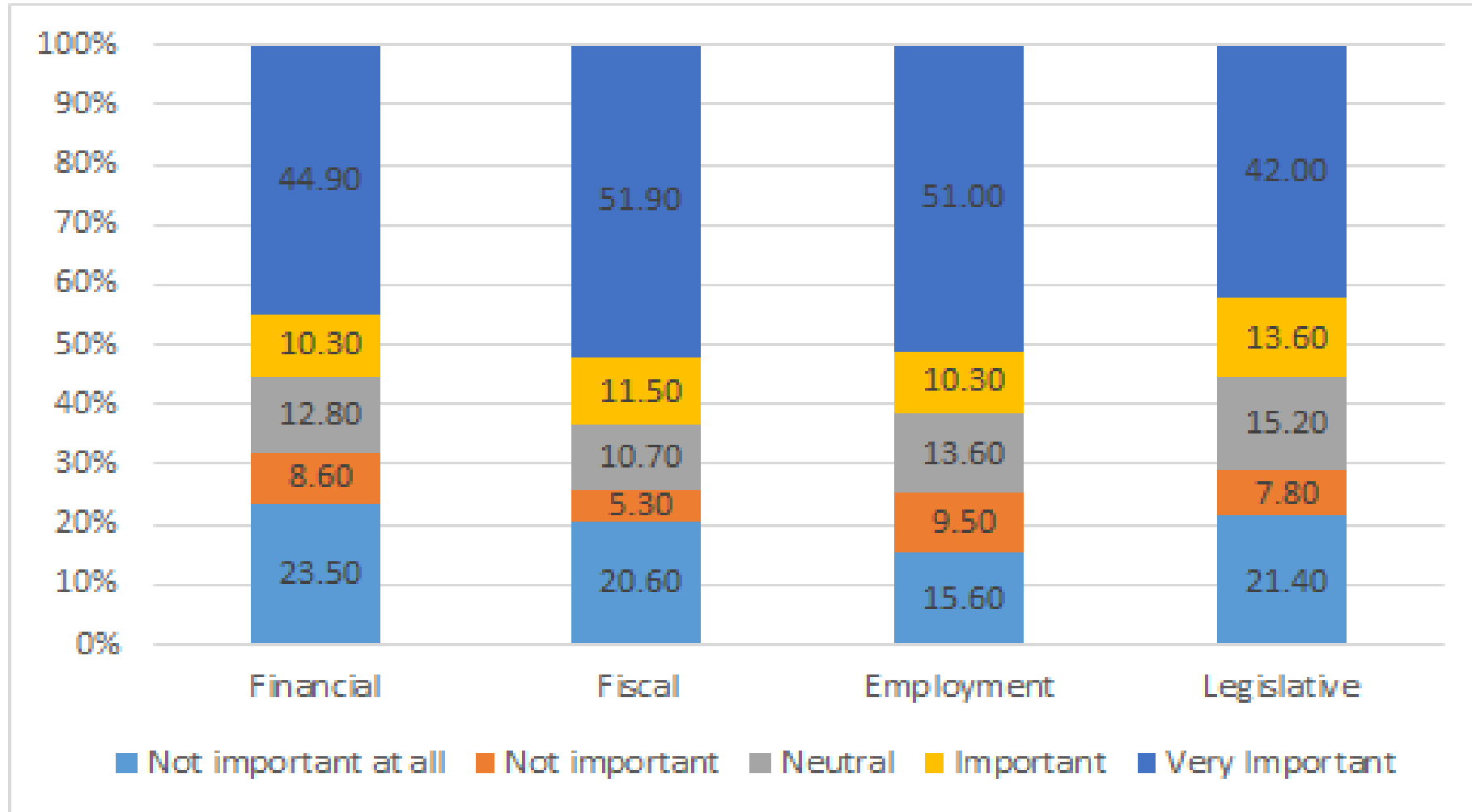
Credit facilities

Postponing cancellation refunds

Safe tourism and vaccination priority

International PR and diplomacy

GOVERNMENT MITIGATION





INDUSTRY STRATEGIES

Restructuring debts

Reducing operating costs

Downsizing & Liquidation

Hygiene and safety standards

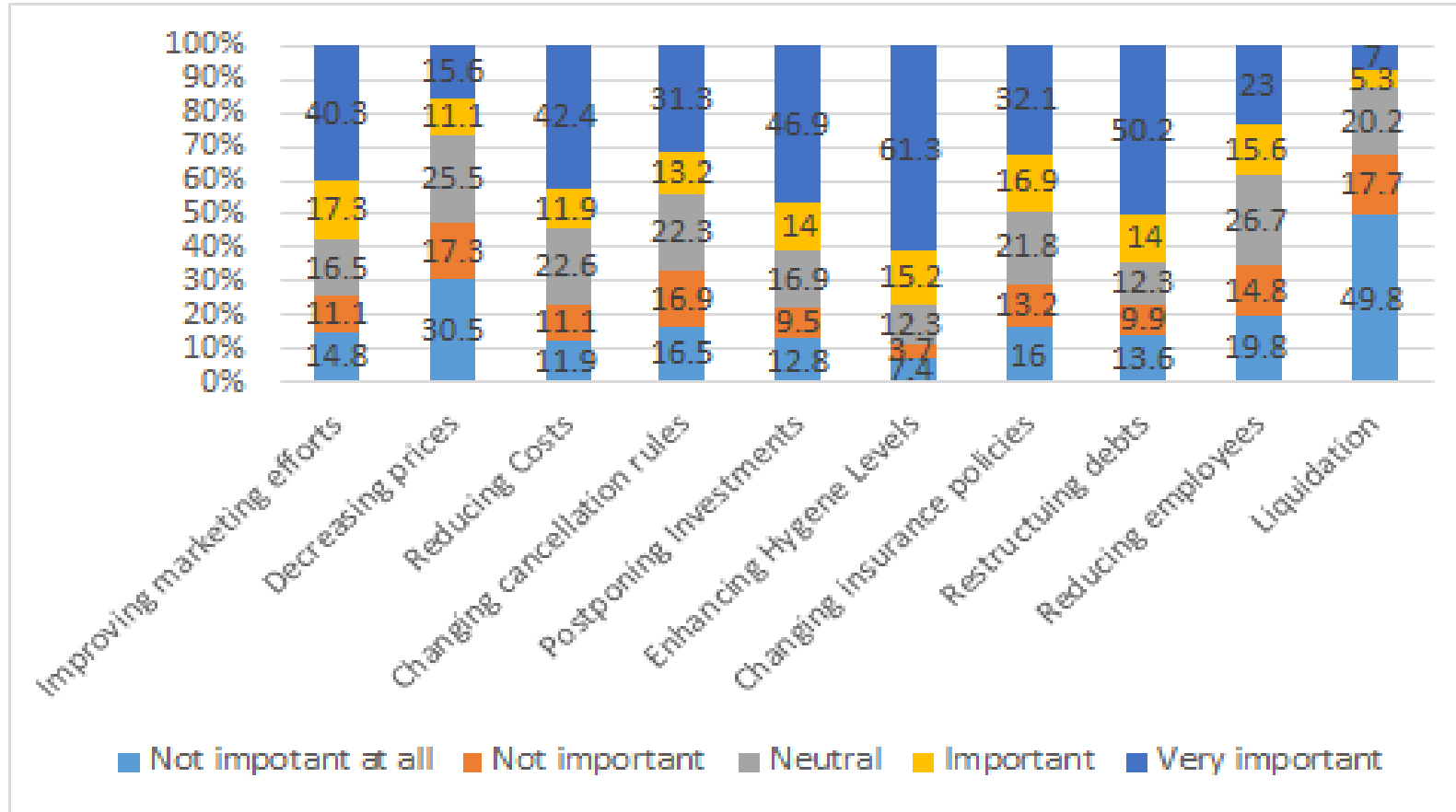
Diversification

Product development

Enhancing quality

Relaxing cancellation policies

INDUSTRY SURVIVAL STRATEGIES





TRANSFORMATIONS IN THE INDUSTRY

Digital Transformations

Product Innovation

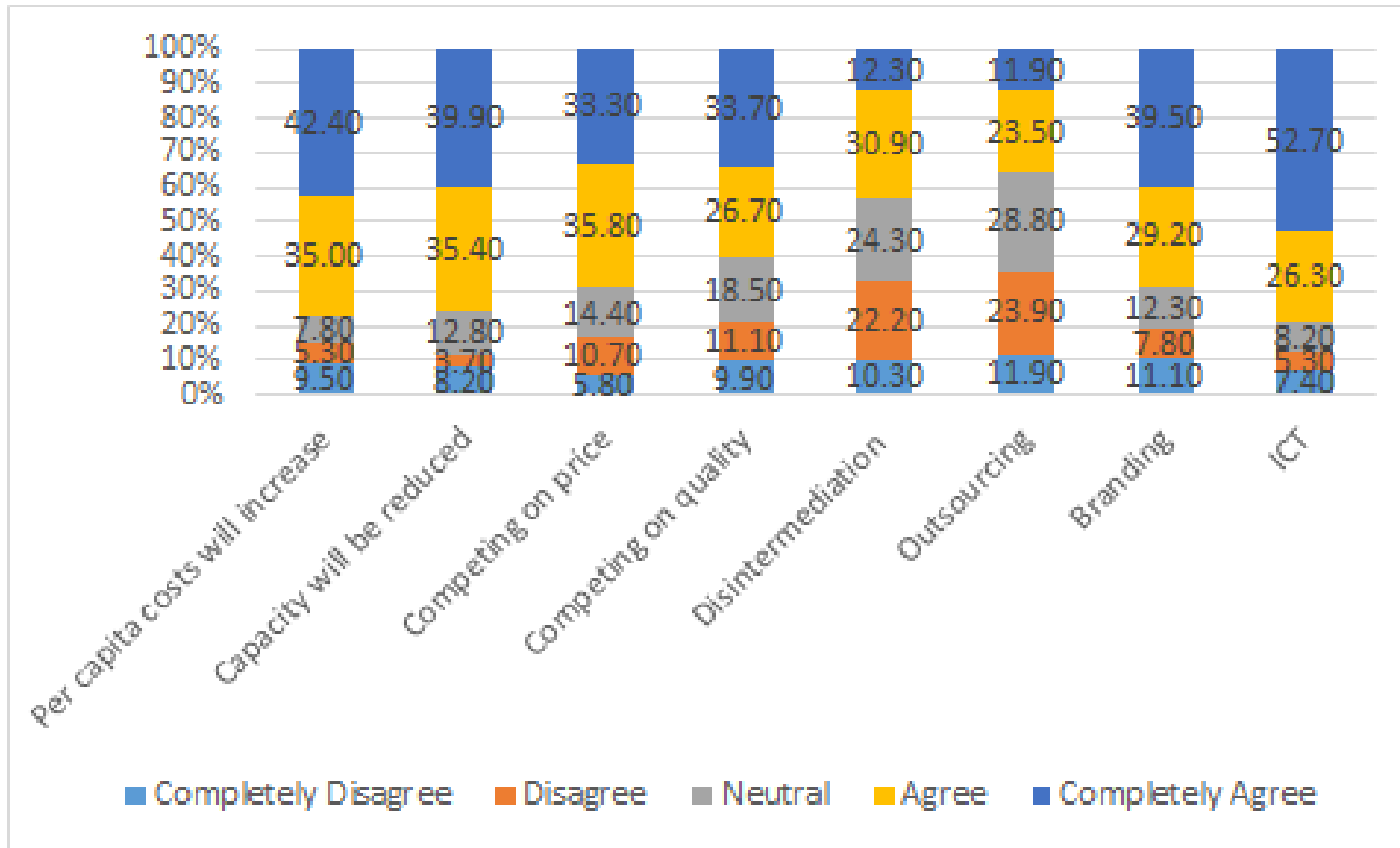
Market Transformations

Collaboration

Increased prices

Sustainability

TRANSFORMATIONS IN THE MARKET





CRISES RESILIENT TOURISM

Ownership type of buildings

Business size

Location

Affiliation

Market segments

Capital structure

Organizational culture and flexibility

POLICY RECOMMENDATIONS FROM TURKEY

Safe Image & Branding

PR for locals

Collaboration & destination governance

Targeting SMEs and informal economy

Prioritize markets and products

Integration of Big Data in Scenario Planning

Balance supply and Demand at optimum price

POLICY RECOMMENDATIONS FOR OIC

Central oversight at OIC

Tourism Corridors and standards

Establish a Standard Semafor within OIC

Marketing Communications and PR

Prioritize Markets and Products

Create safe image and build trust

Integration of Big data and Scenario Planning

Protect intra-OIC airlines

Enhance tourist experience

SPREAD BASED PREVENTION SYSTEM

	LOW RISK	MEDIUM RISK	HIGH RISK	VERY HIGH RISK
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

POLICY RECOMMENDATIONS FOR OIC

Central oversight at OIC

Covid-19 free tourist bubbles

Establish a Standard Semafor within OC

Marketing Communications and PR

Create safe image and build trust

Prioritize Markets and Products

Integration of Big data and Scenario Planning

Protect intra-OIC airlines

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THANK YOU FOR YOUR ATTENTION

