



# 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

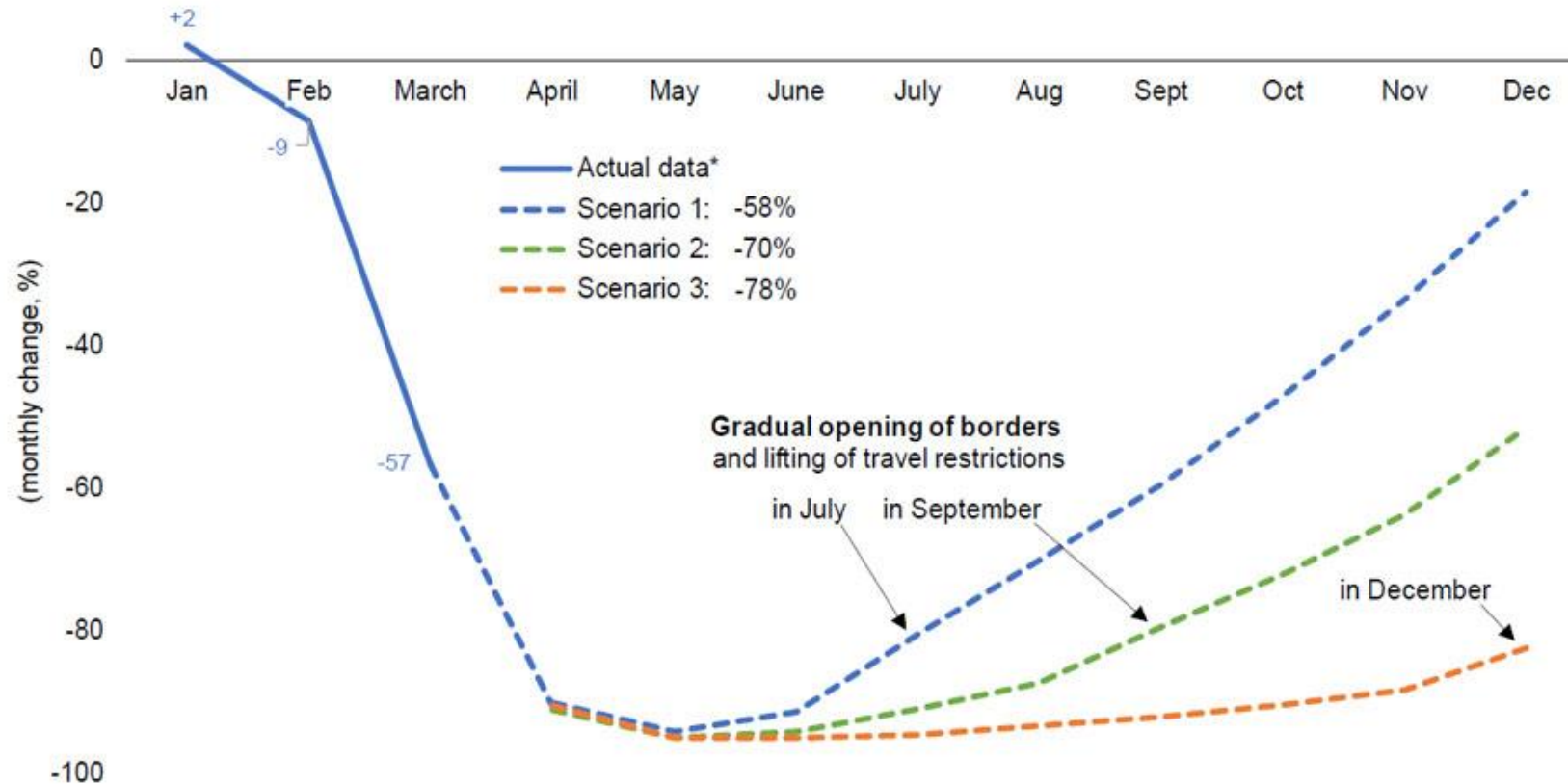
Uncertainty (re-lockdowns, mutations)

Socio-economic impacts

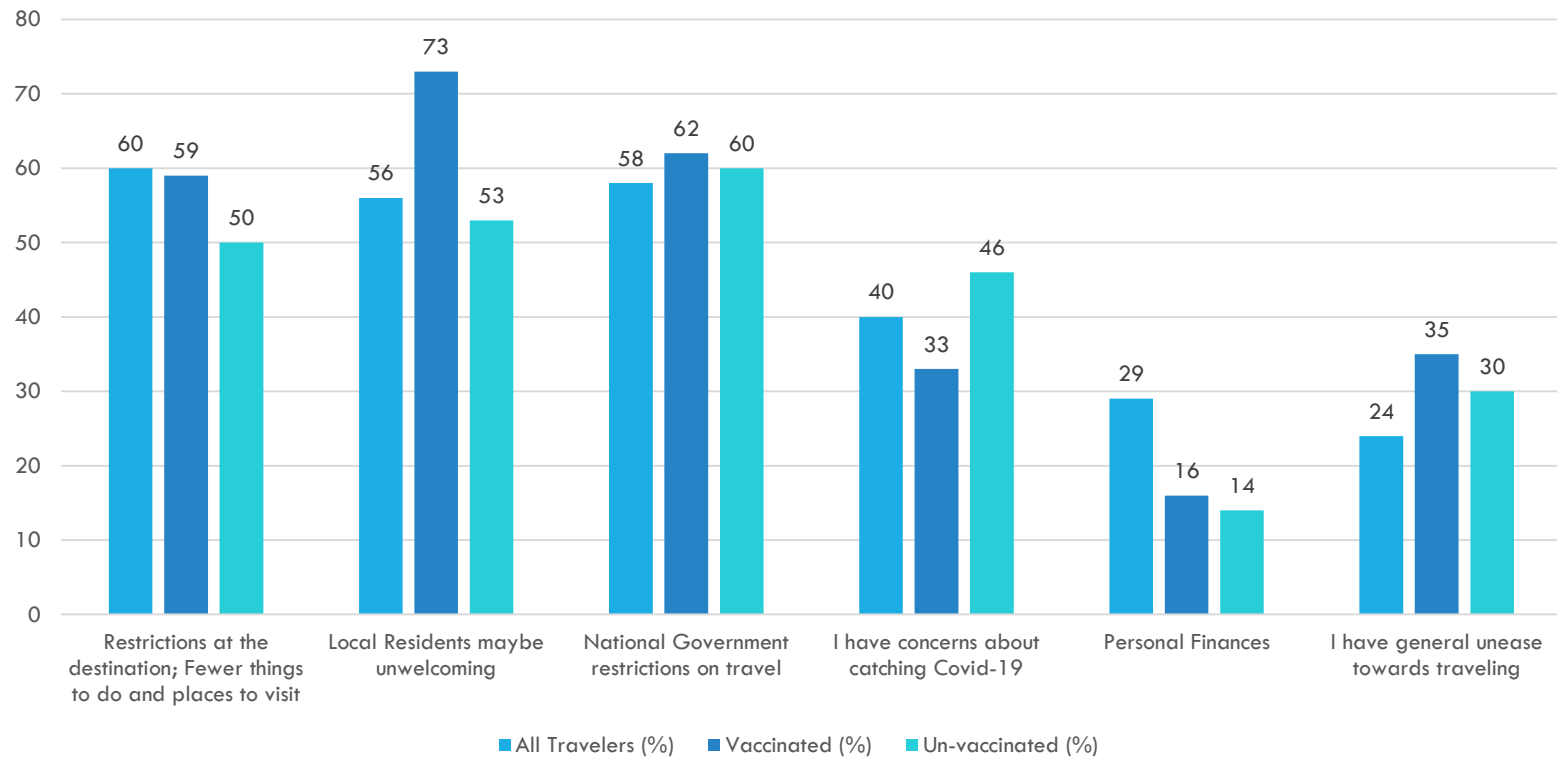
Transformation and adoption

Government intervention

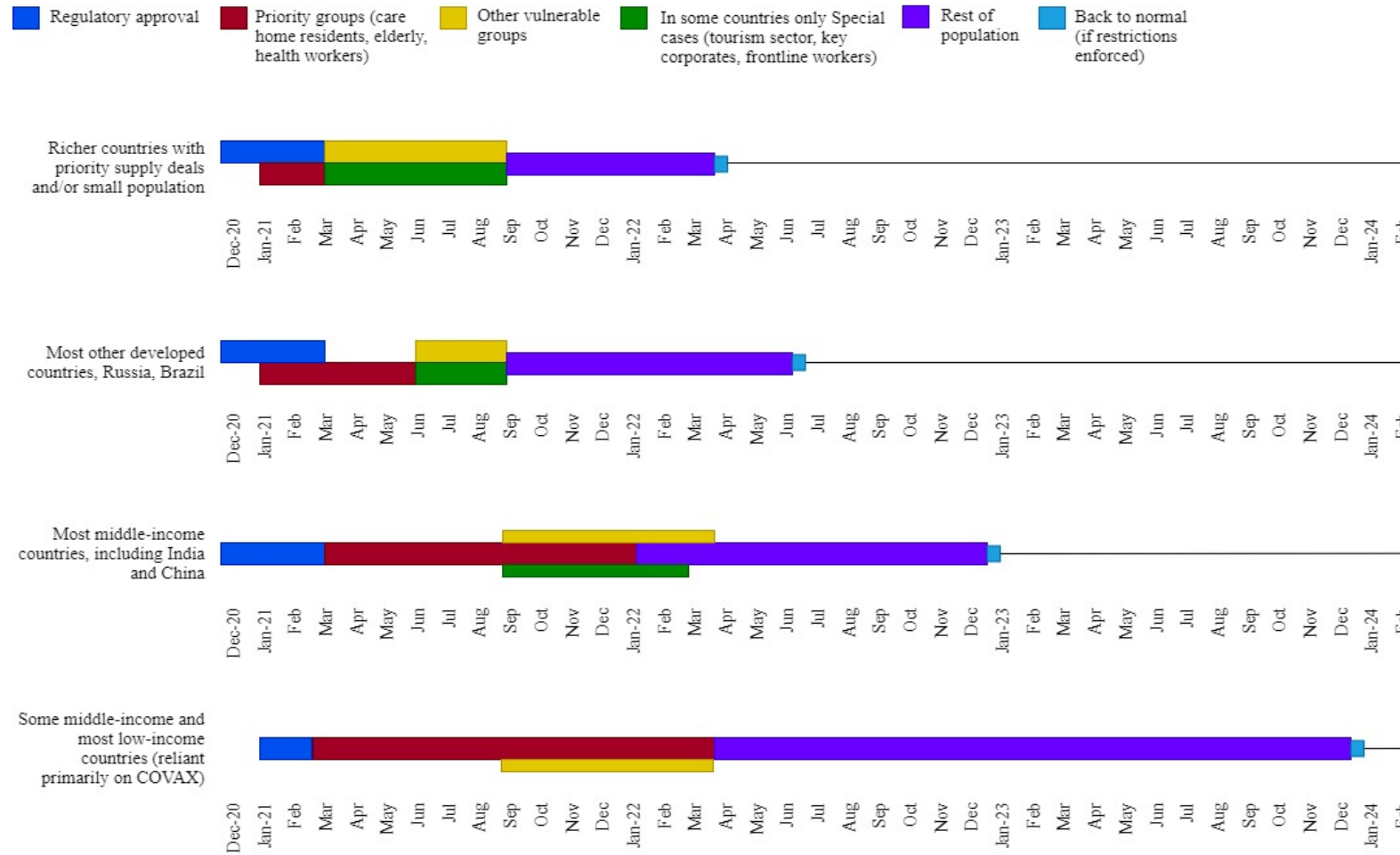
# IMPACTS OF COVID-19 ON GLOBAL TOURISM



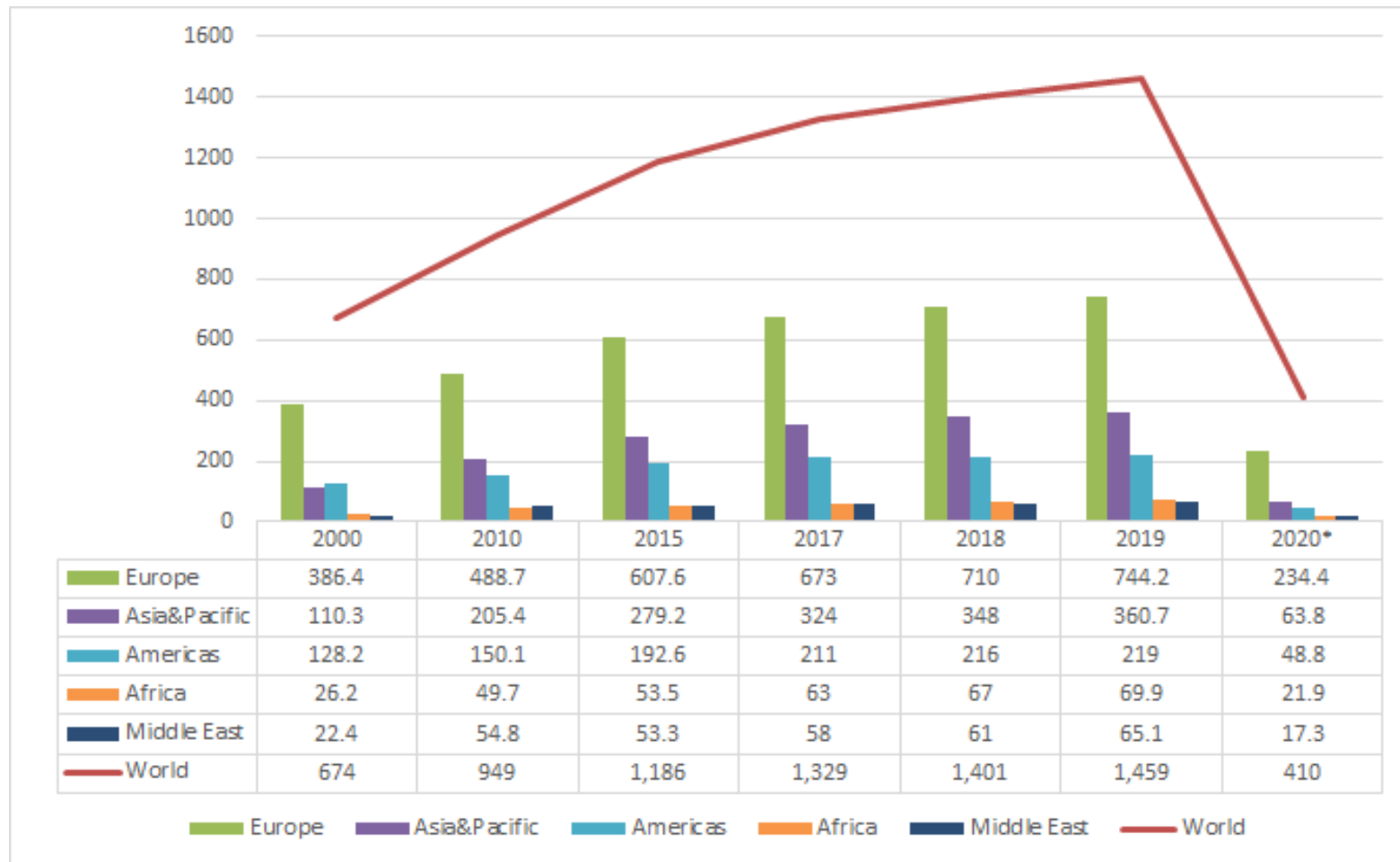
# RECOVERY SCENERIOS - BOOM



# RECOVERY SCENERIOS - GRADUAL



# COVID-19 IMPACT ON GLOBAL TOURISM

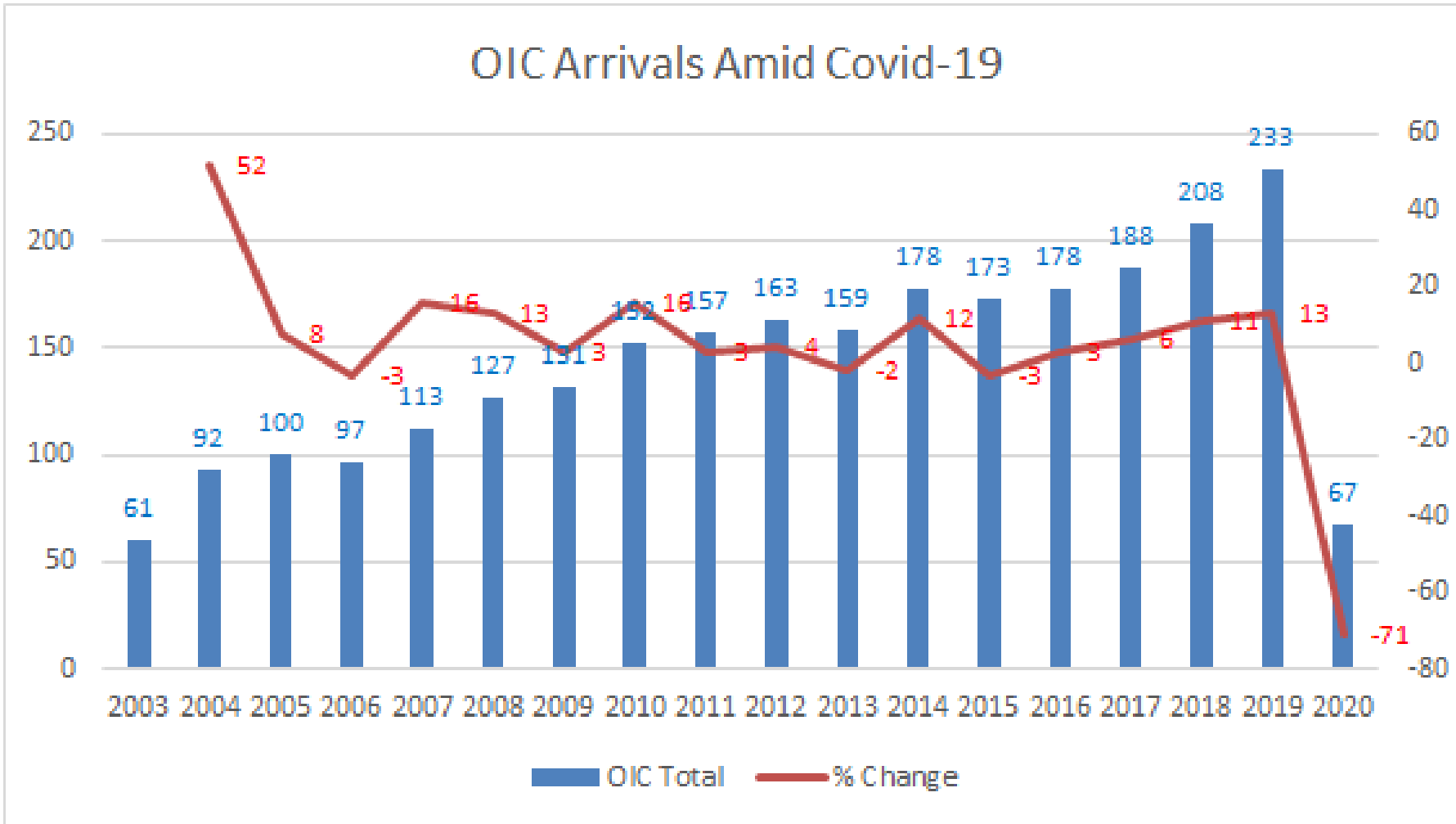




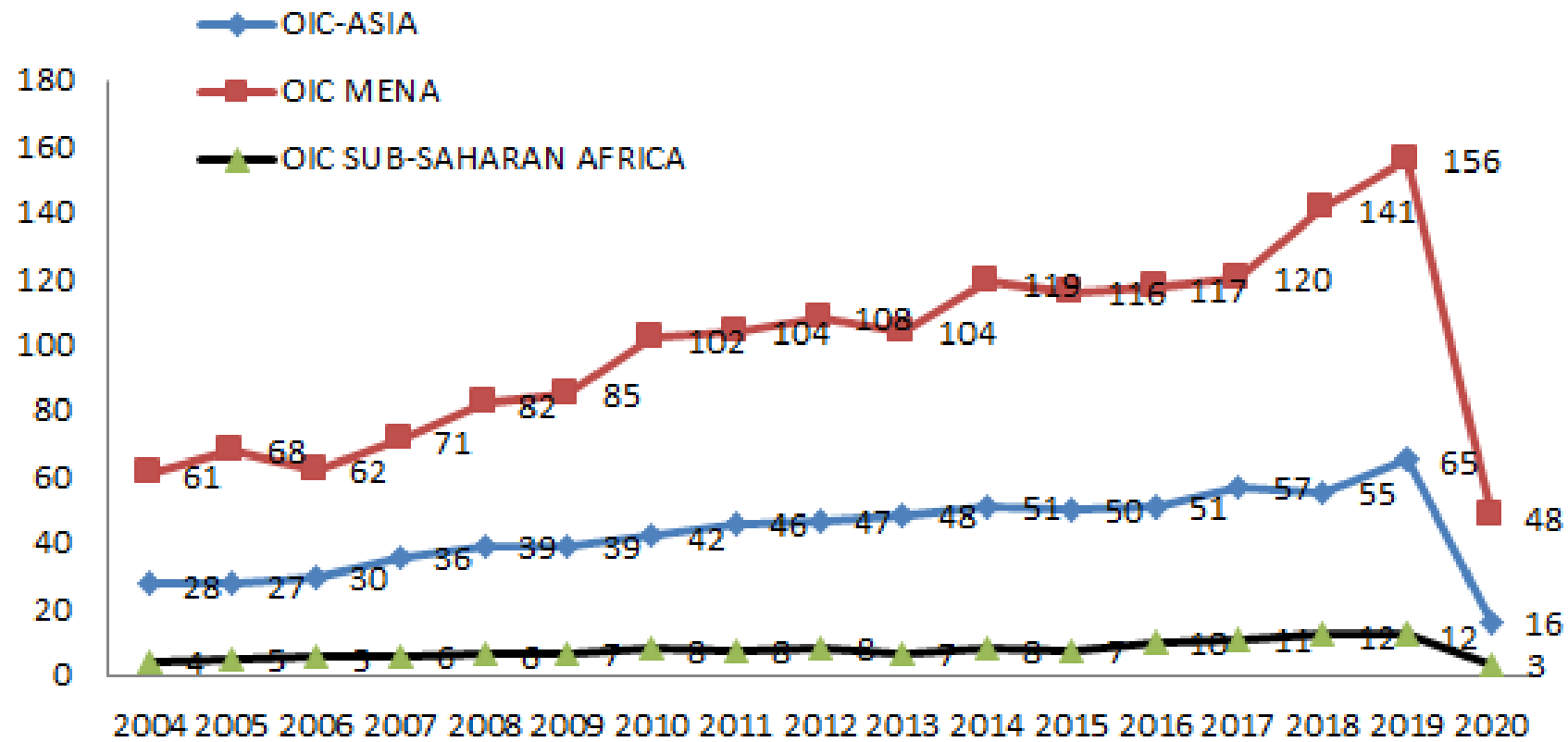
# GLOBAL AND REGIONAL TOURISM

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

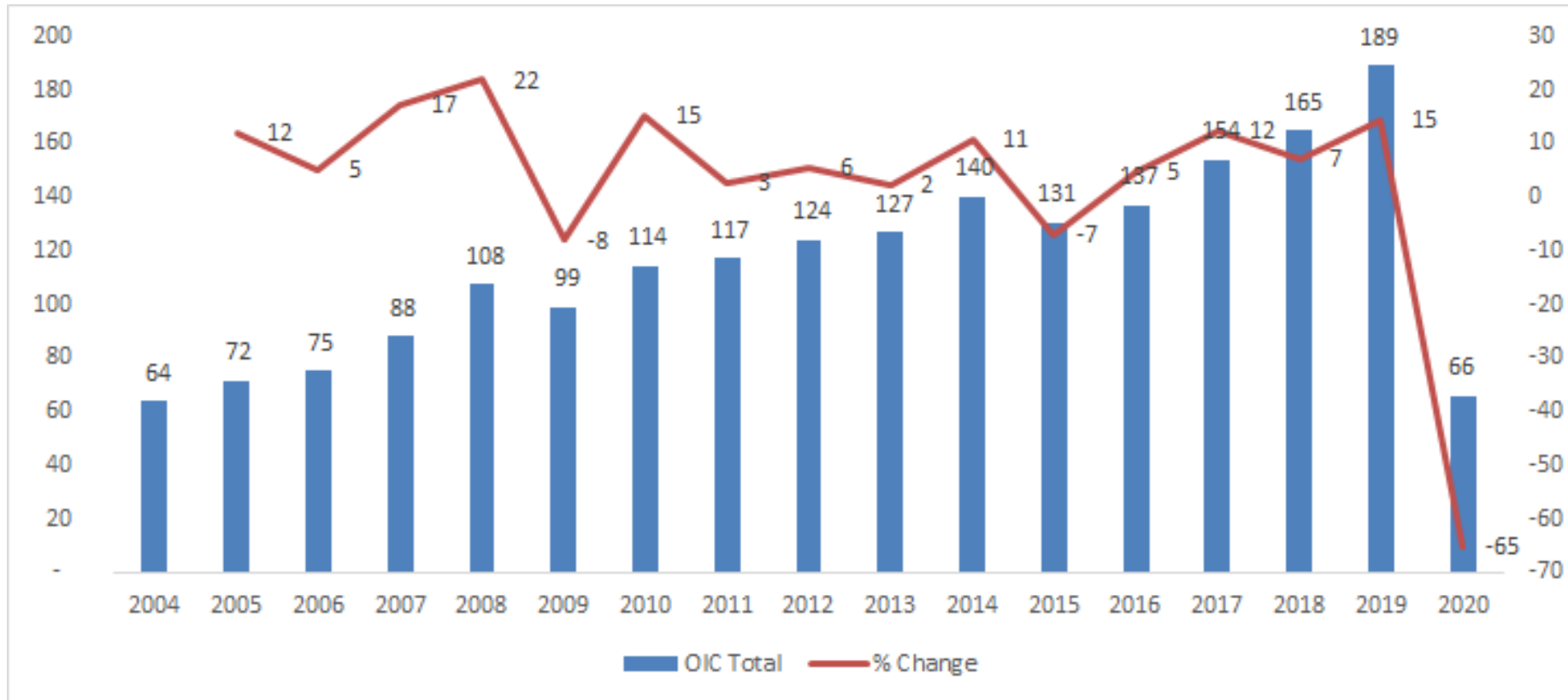
# IMPACTS OF COVID-19 ON OIC TOURISM



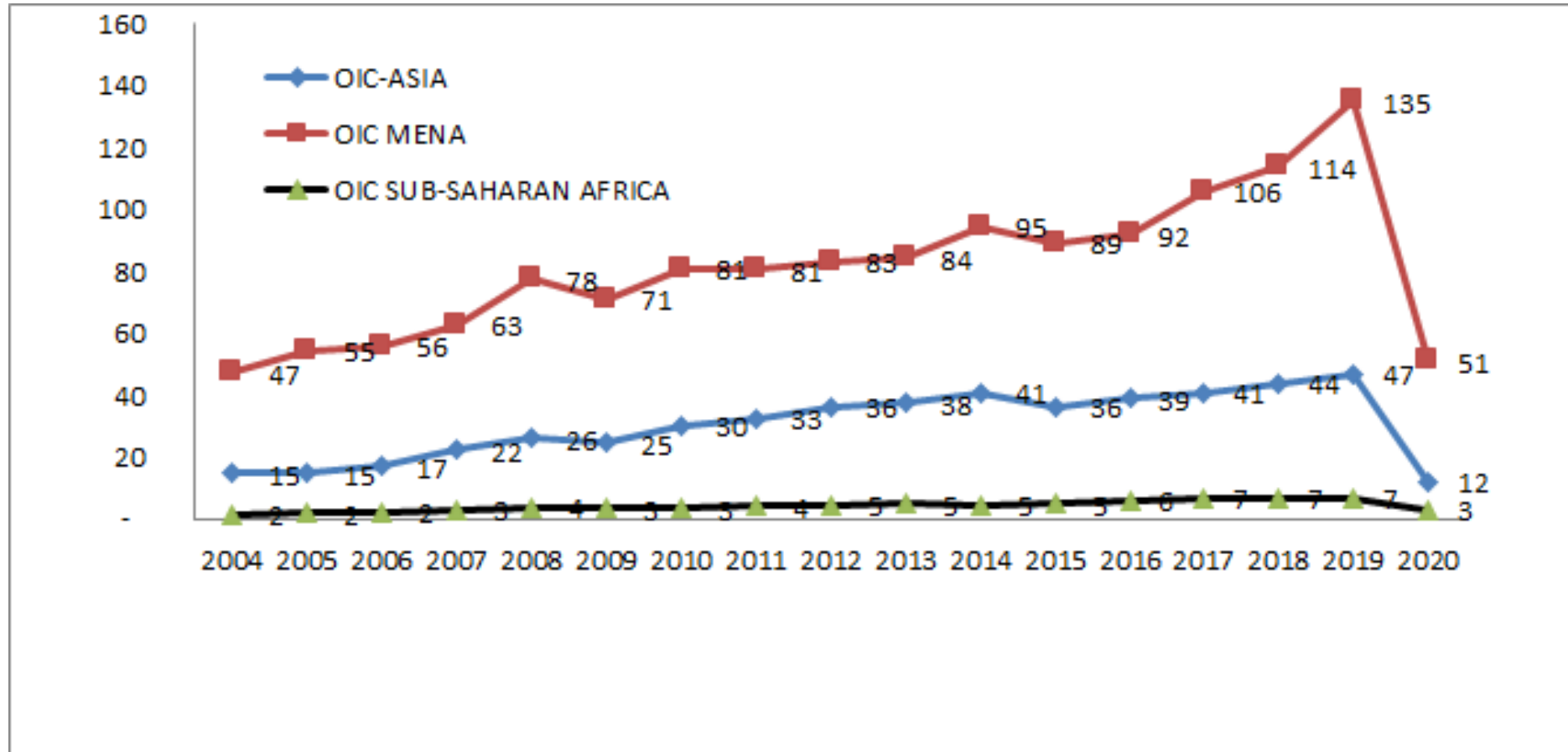
# REGIONAL OIC ARRIVALS



# OIC TOURISM RECEIPTS



# REGIONAL OIC TOURISM RECEIPTS



# MITIGATION STRATEGIES

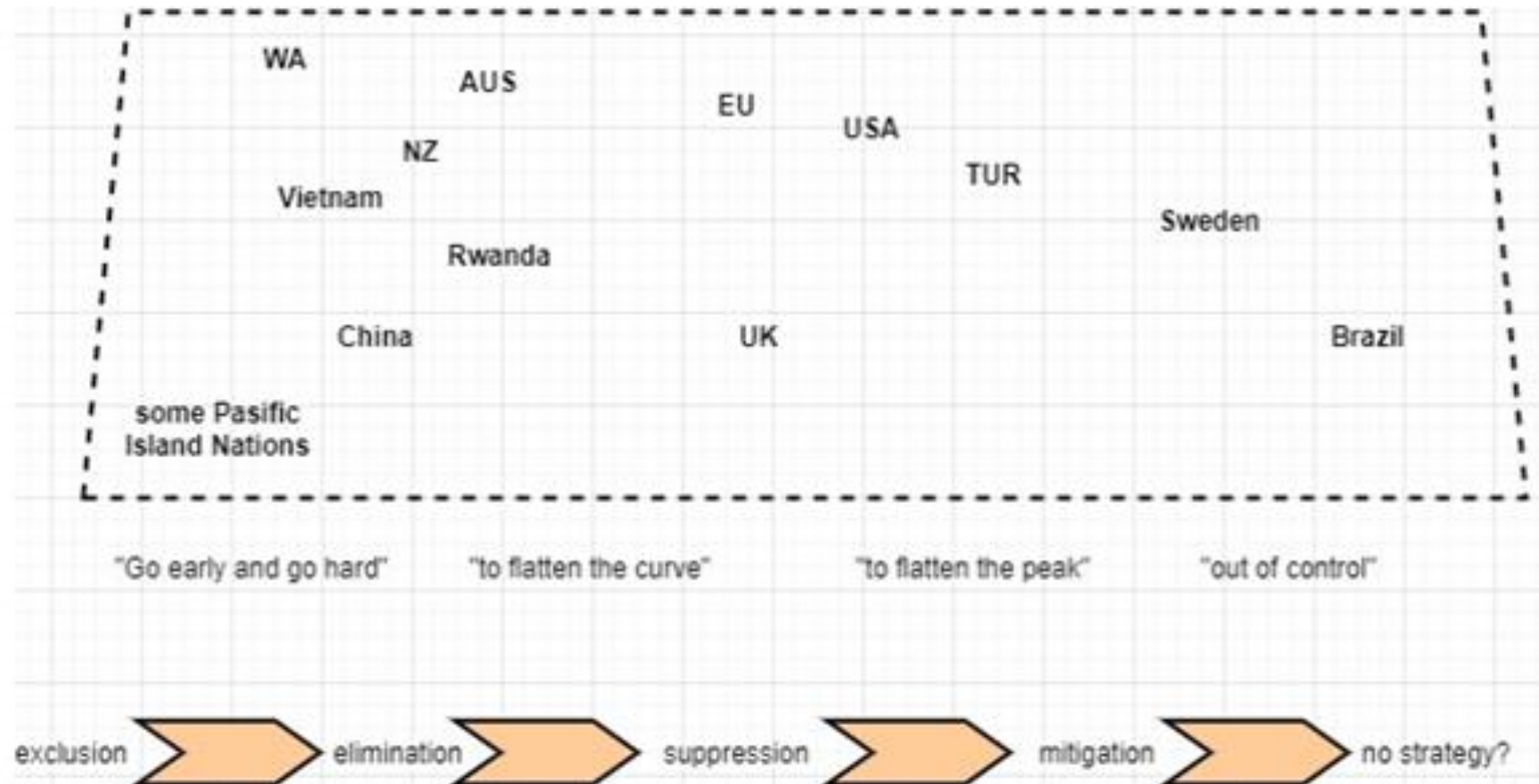
## Collective and coordinated response

- Governments
- Private Sector

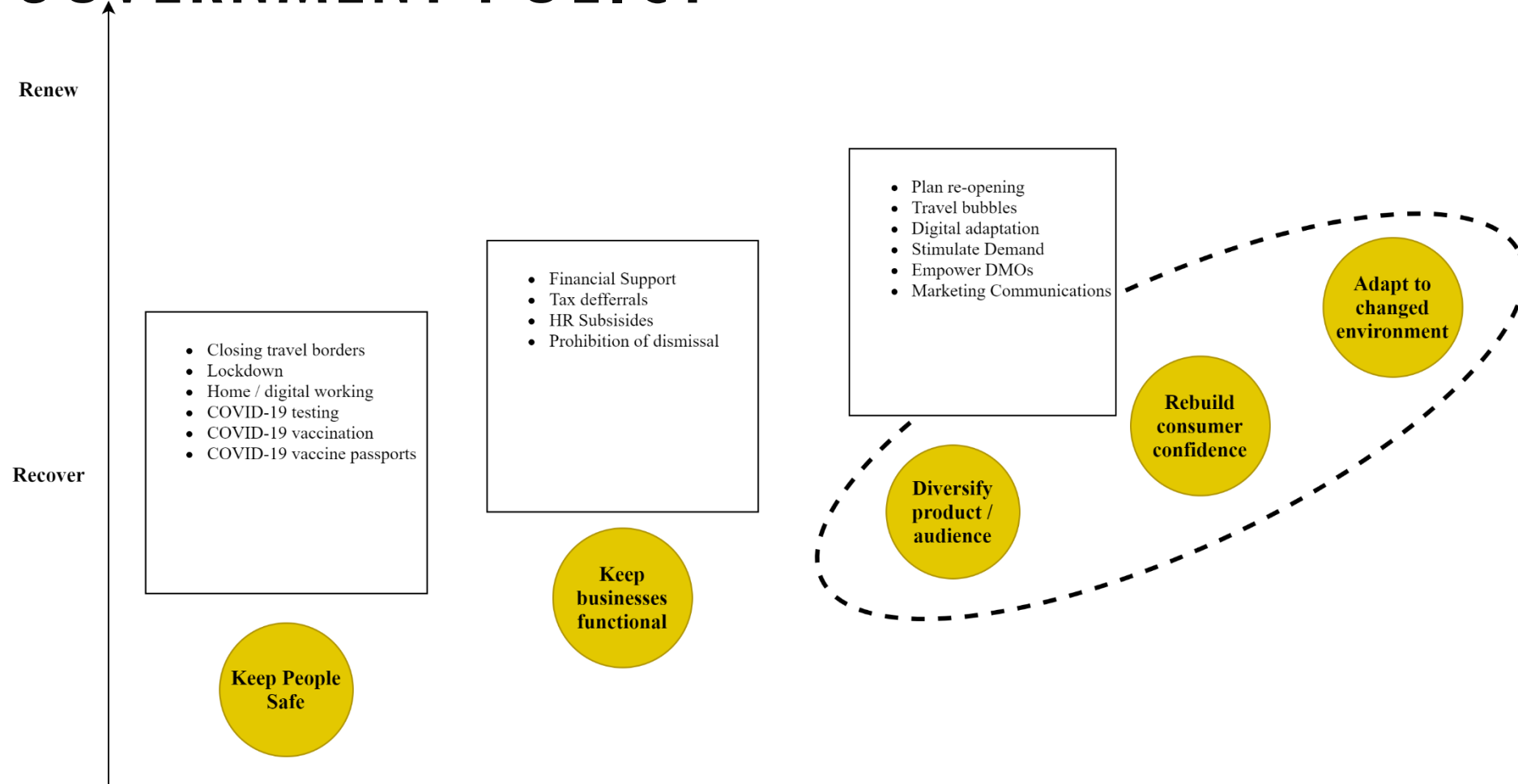
## Features of response

- 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.  
Gurel Cetin

# 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

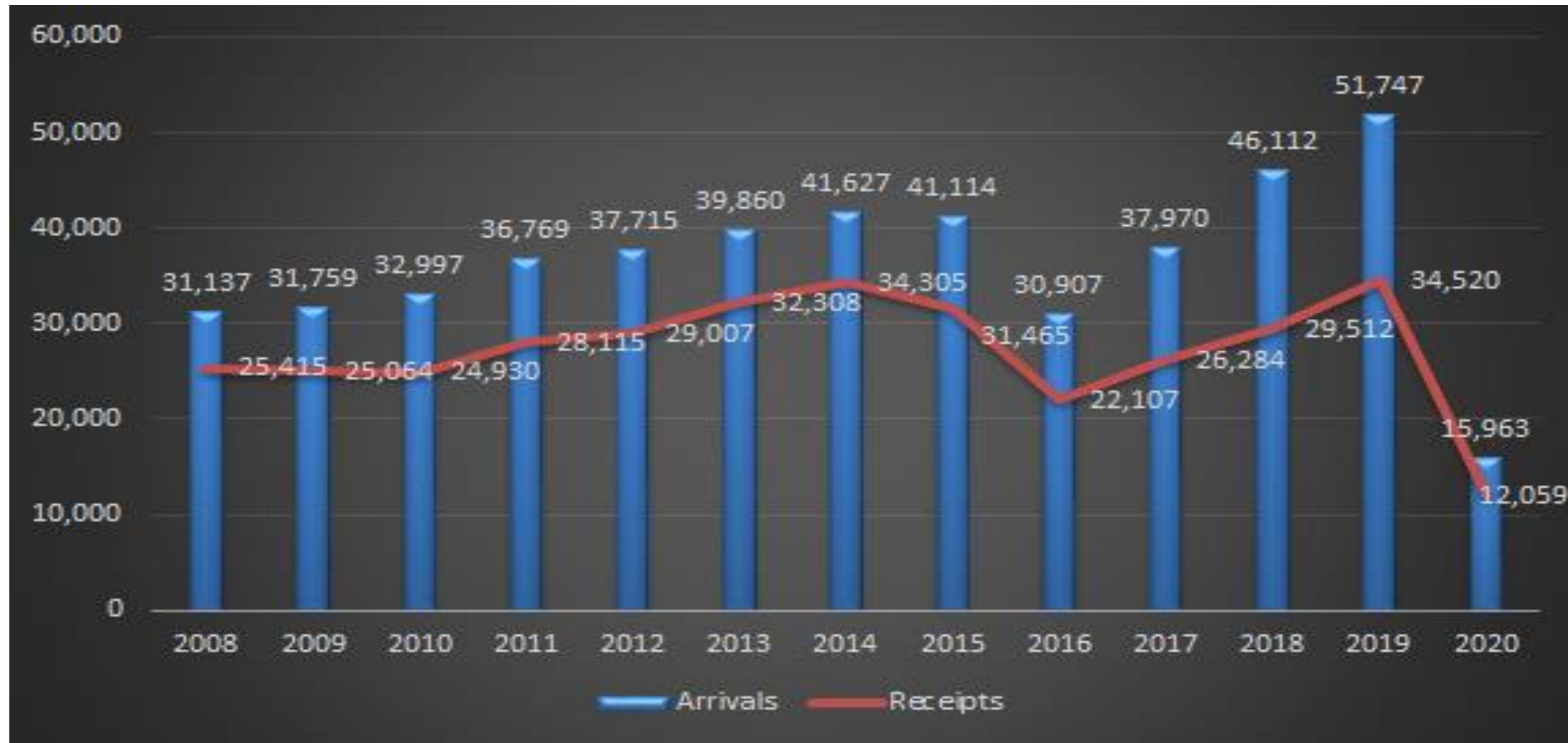
## Case Countries

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

# THE TURKISH CASE

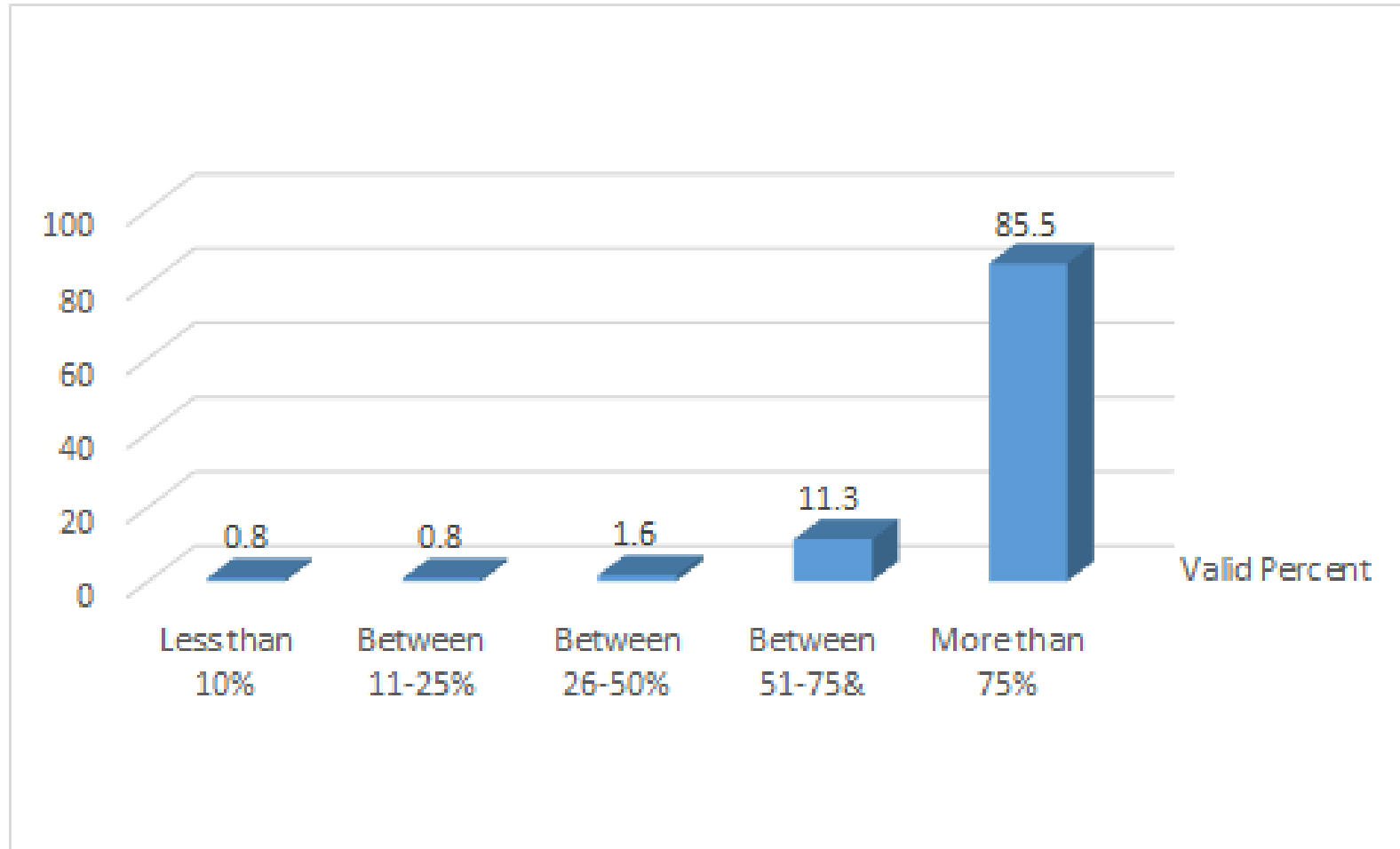
- Global destination
- 9% of employment and 12% of GDP
- Crises & Risk Management
  - Tourism Industry Resiliency
  - Government Incentives
  - Product & Market Diversification

# IMPACTS COVID-19

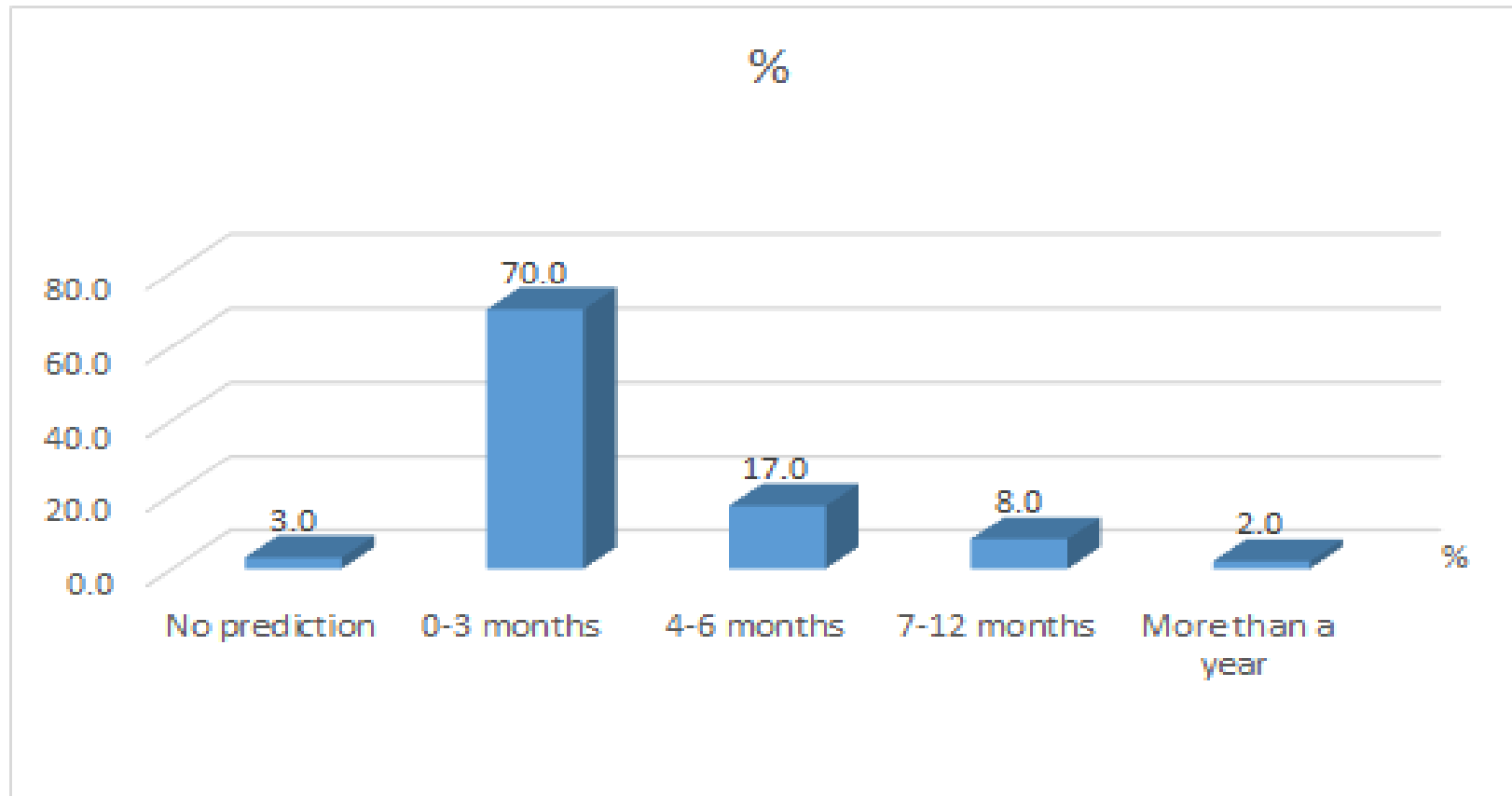




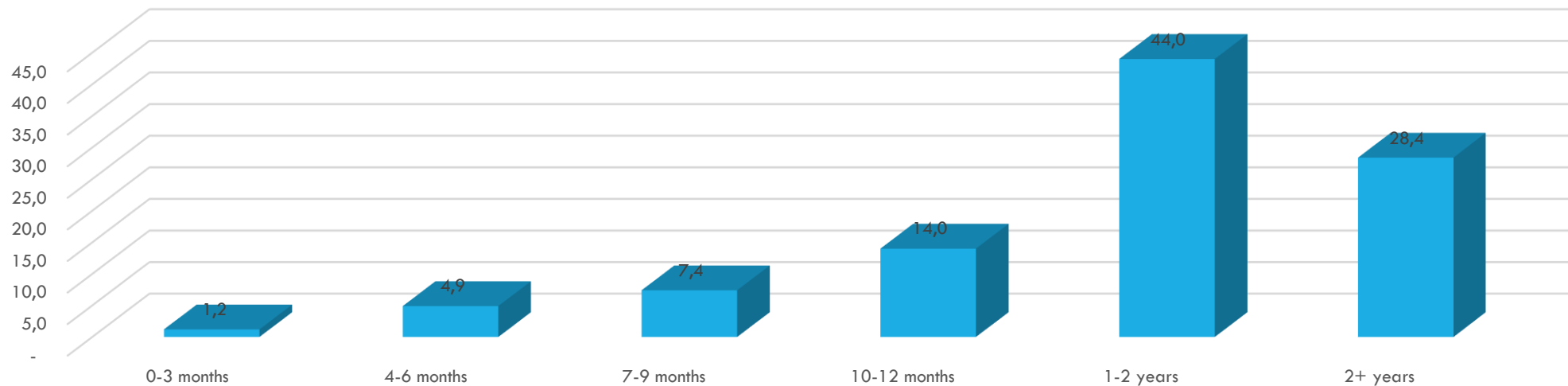
# REVENUE LOSS IN TOURISM INDUSTRY



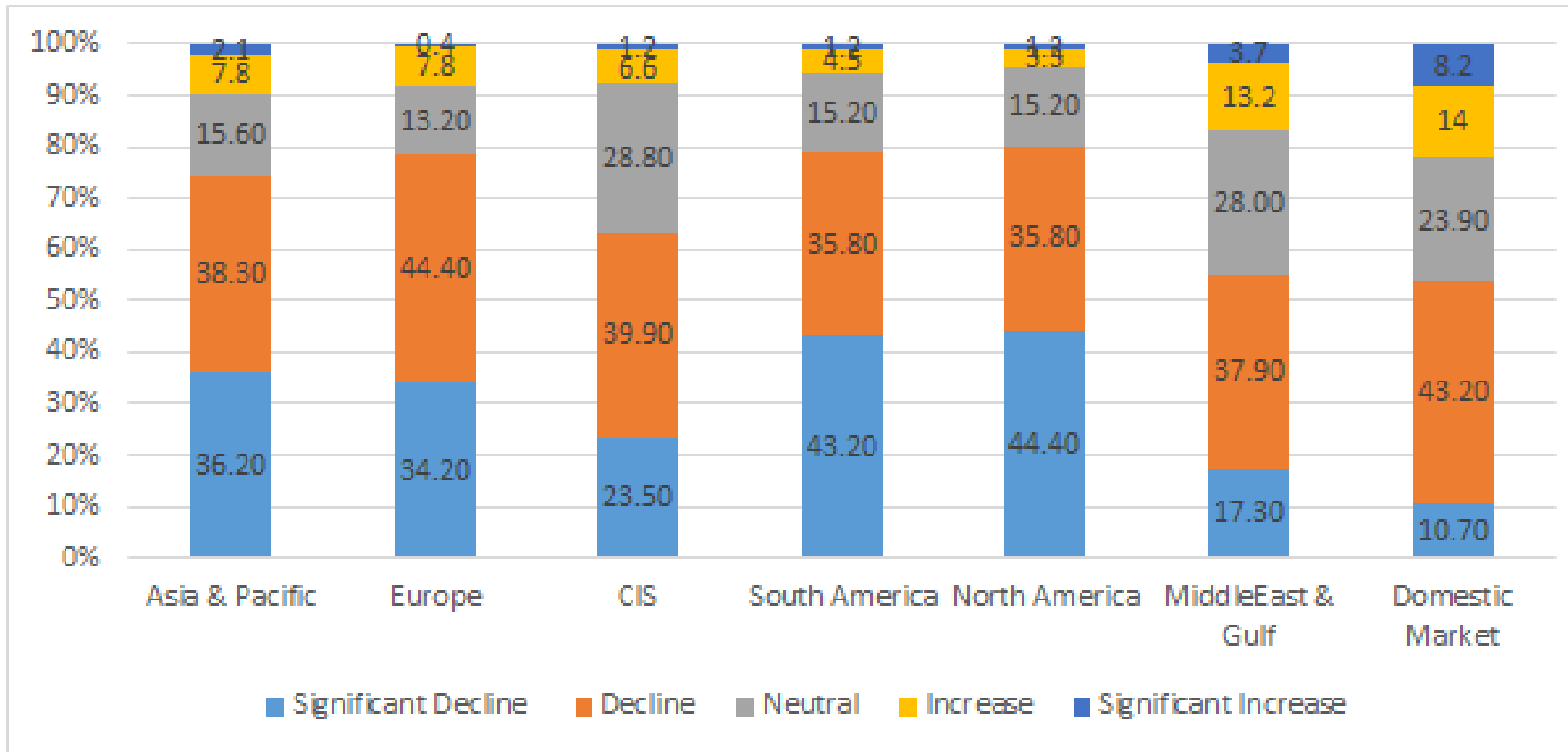
# SURVIVAL OF TOURISM INDUSTRY



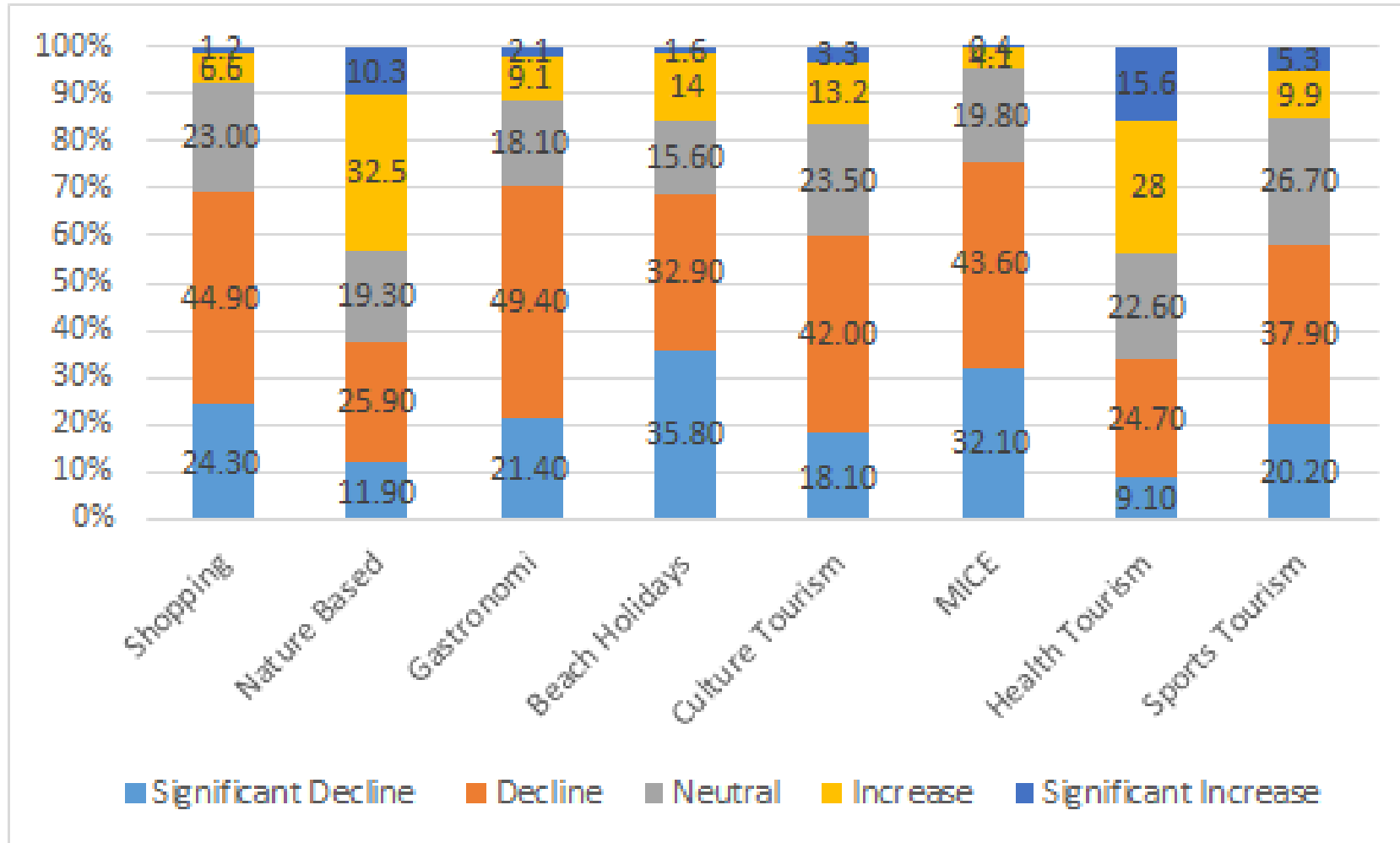
# RECOVERY TO PRE-COVID VOLUME



# TRANSFORMATION IN MARKETS



# TRANSFORMATIONS IN TRAVEL MOTIVATIONS





# GOVERNMENT STRATEGIES

Short-term work allowance

Tax reduction and deferrals

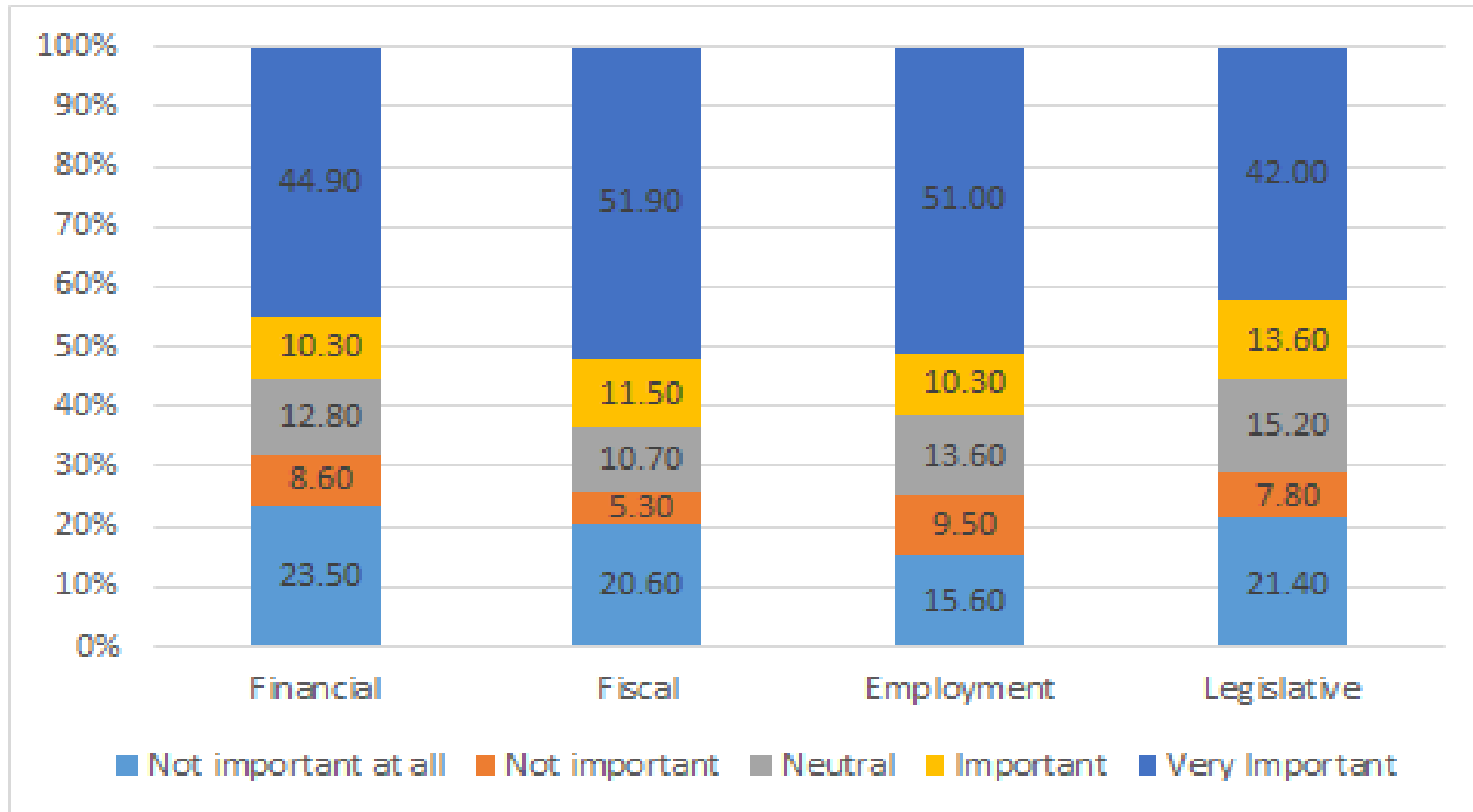
Credit facilities

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

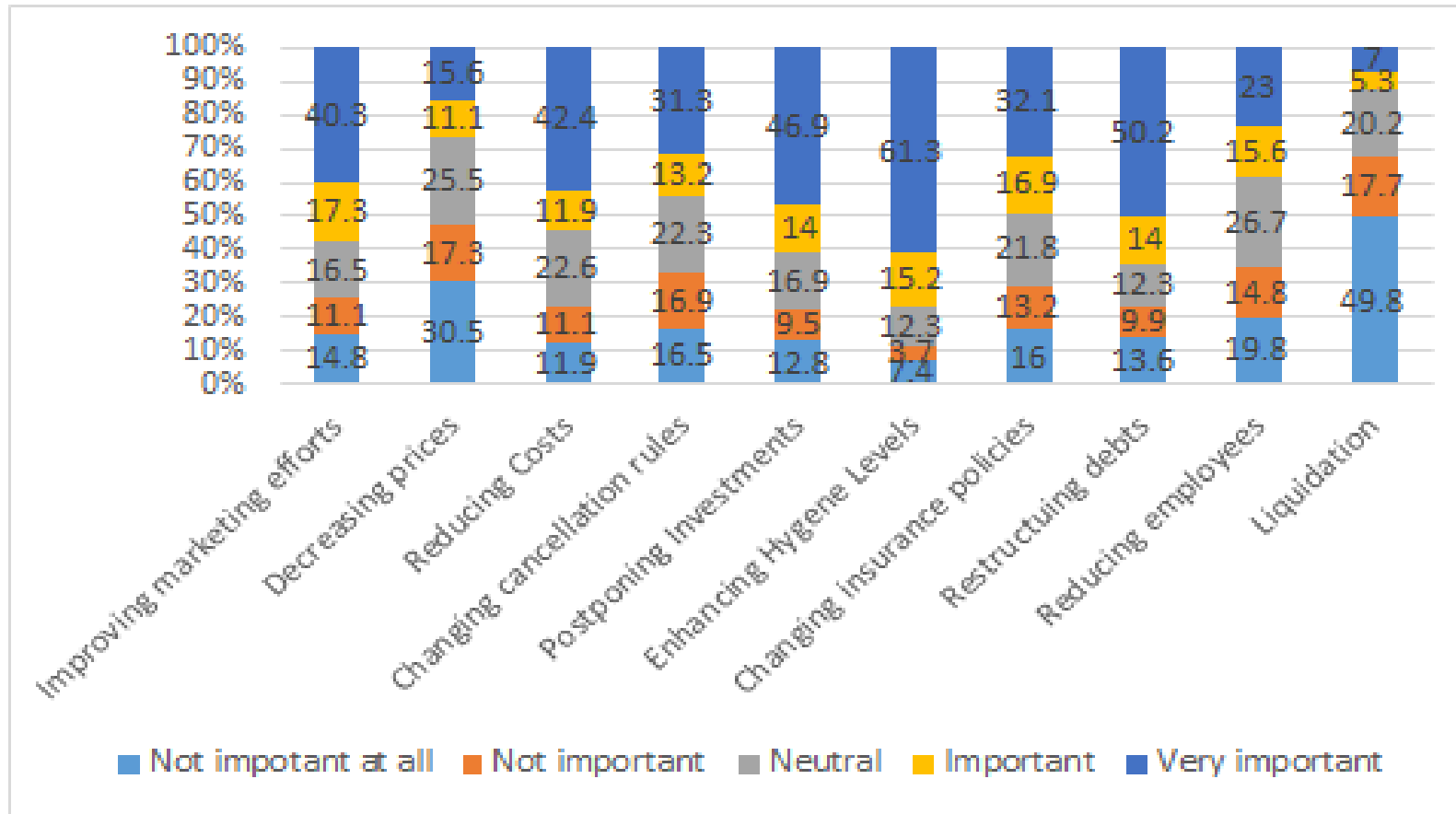
Product development

Enhancing quality

Relaxing cancellation policies



# INDUSTRY SURVIVAL STRATEGIES





# TRANSFORMATIONS IN THE INDUSTRY

Digital Transformations

Product Innovation

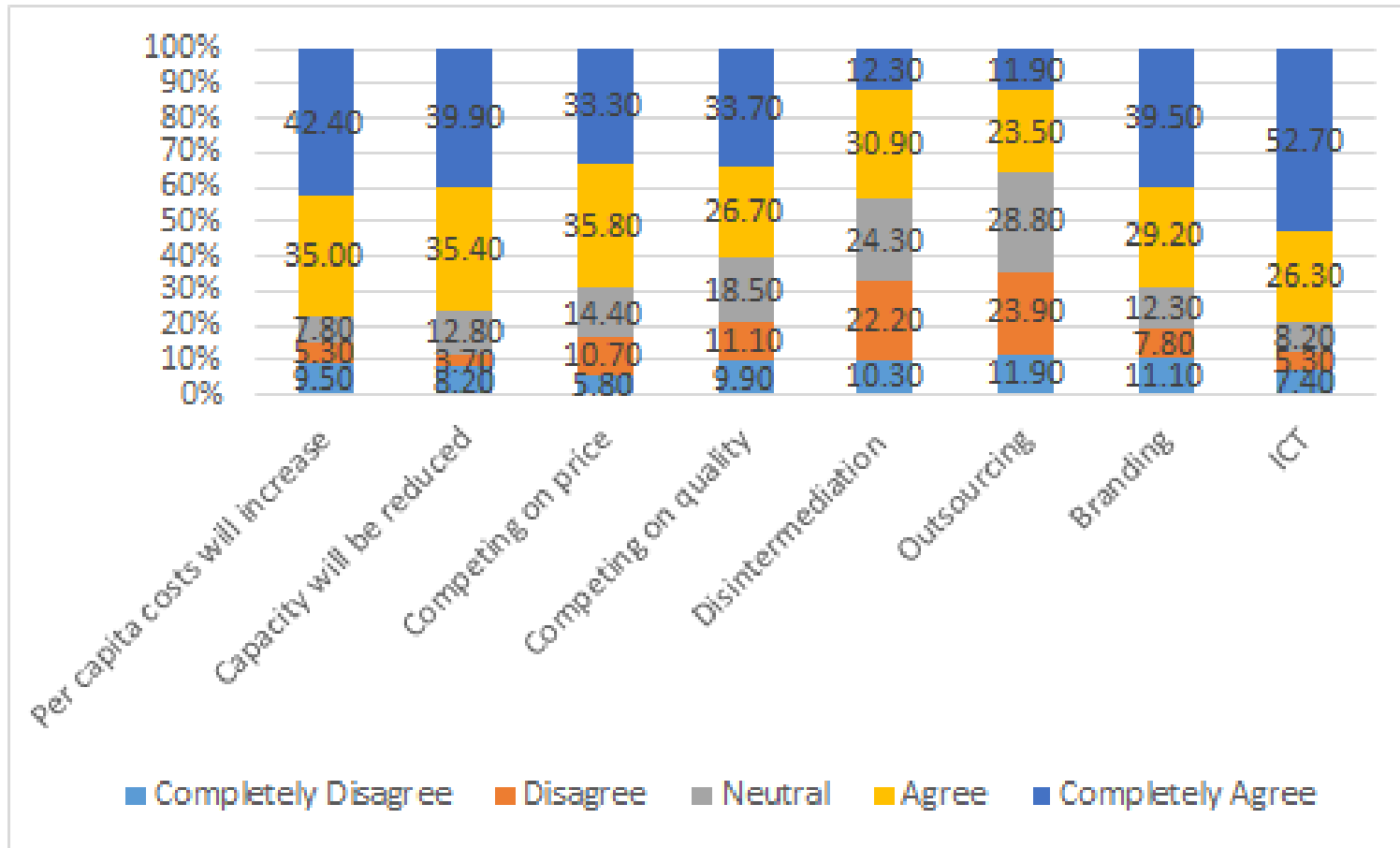
Market Transformations

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
<b>GOING OUT ON THE WEEKEND</b>	ALLOWED	ALLOWED	SUNDAY CURFEW	SUNDAY CURFEW
<b>GOING OUT AT NIGHT</b>	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.
<b>AGES +65 AND -20</b>	ALLOWED	ALLOWED	WILL BE EASED	WILL BE EASED
<b>PRE-SCHOOLS</b>	OPEN	OPEN	OPEN	OPEN
<b>ELEMENTARY SCHOOLS</b>	OPEN	OPEN	OPEN	OPEN
<b>GRADES 8 AND 12</b>	OPEN	OPEN	OPEN	OPEN
<b>MIDDLE SCHOOLS</b>	OPEN	OPEN	CLOSED	CLOSED
<b>HIGH SCHOOLS</b>	OPEN	OPEN	IN-PERSON EXAMS	IN-PERSON EXAMS
<b>CAFES/ RESTAURANTS/ BAKERIES/ CONFECTIONERS/ TEA GARDENS</b>	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
<b>FOOTBALL FIELDS/ SWIMMING POOLS</b>	9.00 A.M.-7.00 P.M	9.00 A.M.-7.00 P.M	CLOSED	CLOSED
<b>PUBLIC INSTITUTIONS</b>	NORMAL	NORMAL	NORMAL	NORMAL
<b>WEDDING HALLS</b>	UP TO 50 PEOPLE 1 HOUR	UP TO 50 PEOPLE 1 HOUR	UP TO 50 PEOPLE 1 HOUR	UP TO 50 PEOPLE 1 HOUR
<b>GENERAL ASSEMBLIES</b>	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

Enhance tourist experience





COMCEC

THANK YOU FOR YOUR ATTENTION

