



TOURISM MITIGATION STRATEGIES AMID COVID-19 IN OIC COUNTRIES



COMCEC COORDINATION OFFICE
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RISK AND CRISES MANAGEMENT IN TOURISM

Tourism is perishable and can not be stored.

Tourism spending is discretionary

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

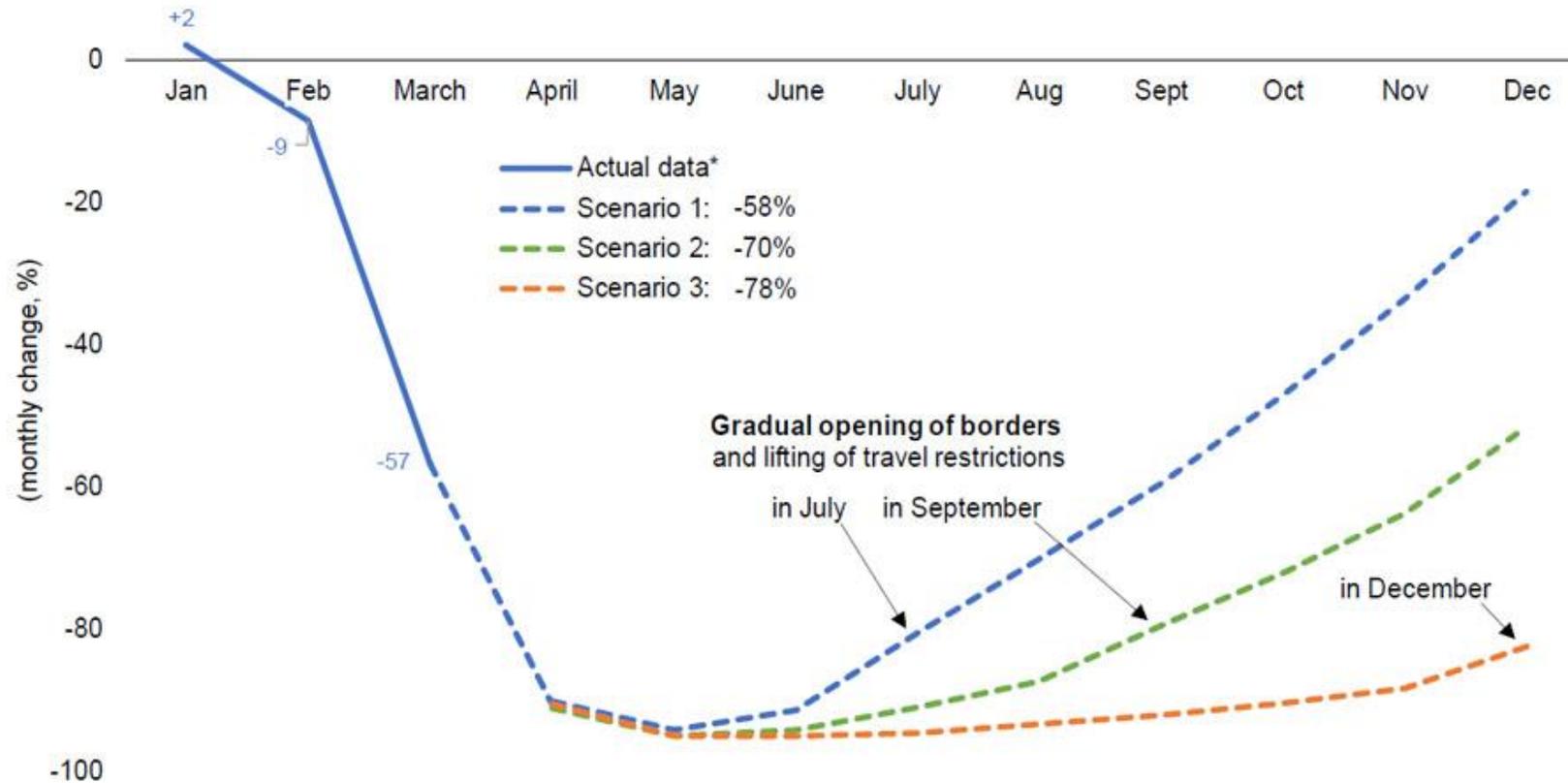
Uncertainty (re-lockdowns, mutations)

Socio-economic impacts

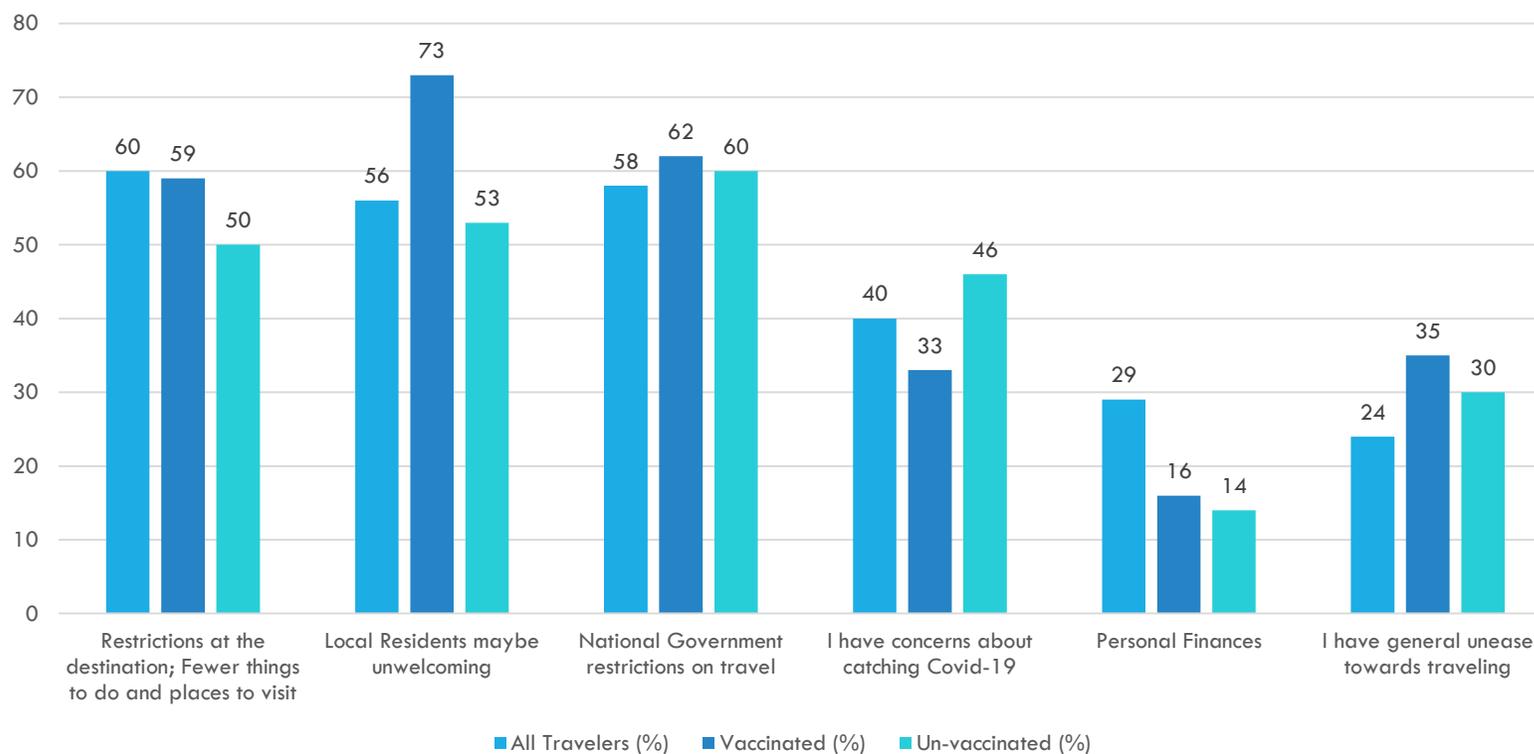
Transformation and adoption

Government intervention

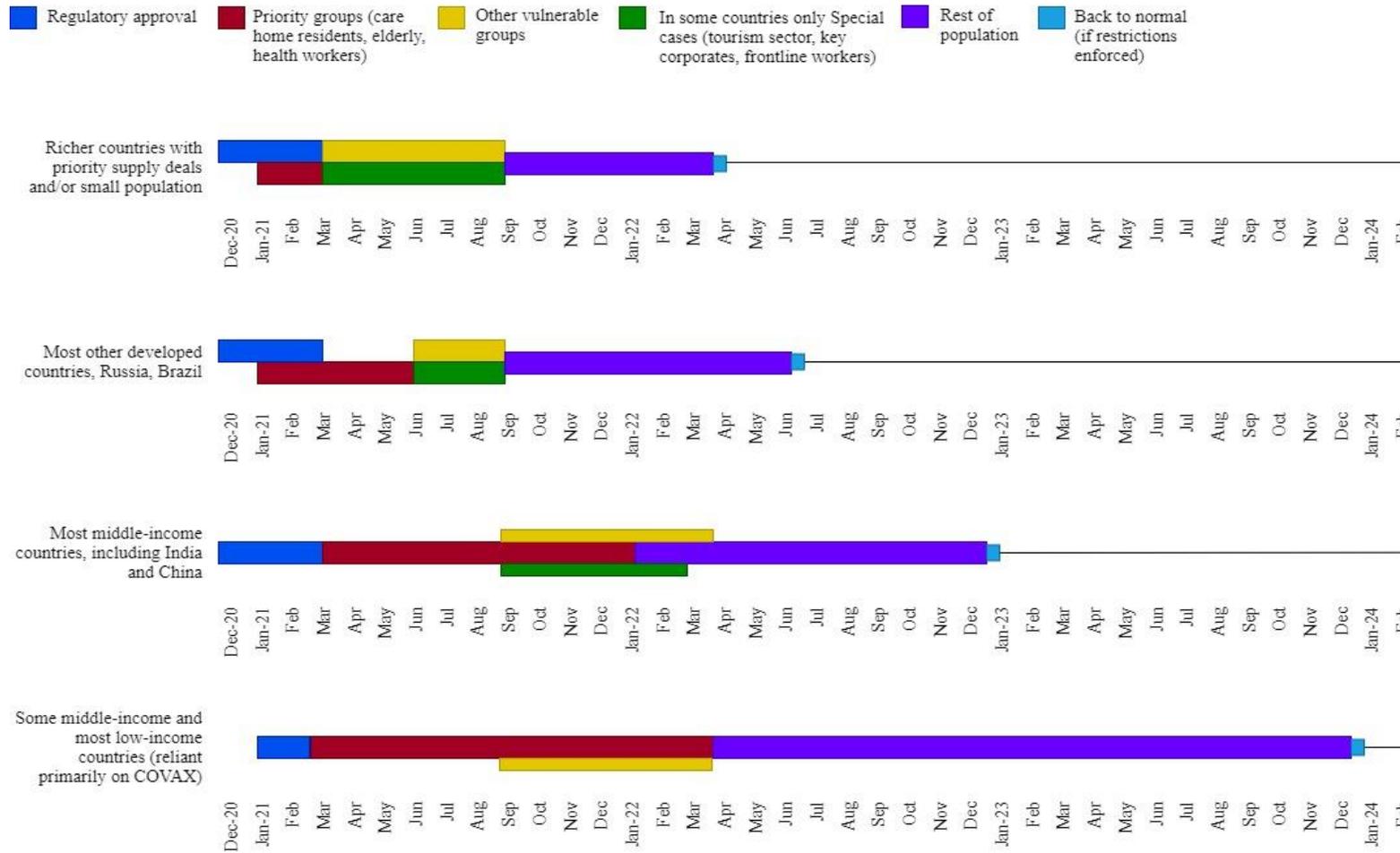
IMPACTS OF COVID-19 ON GLOBAL TOURISM



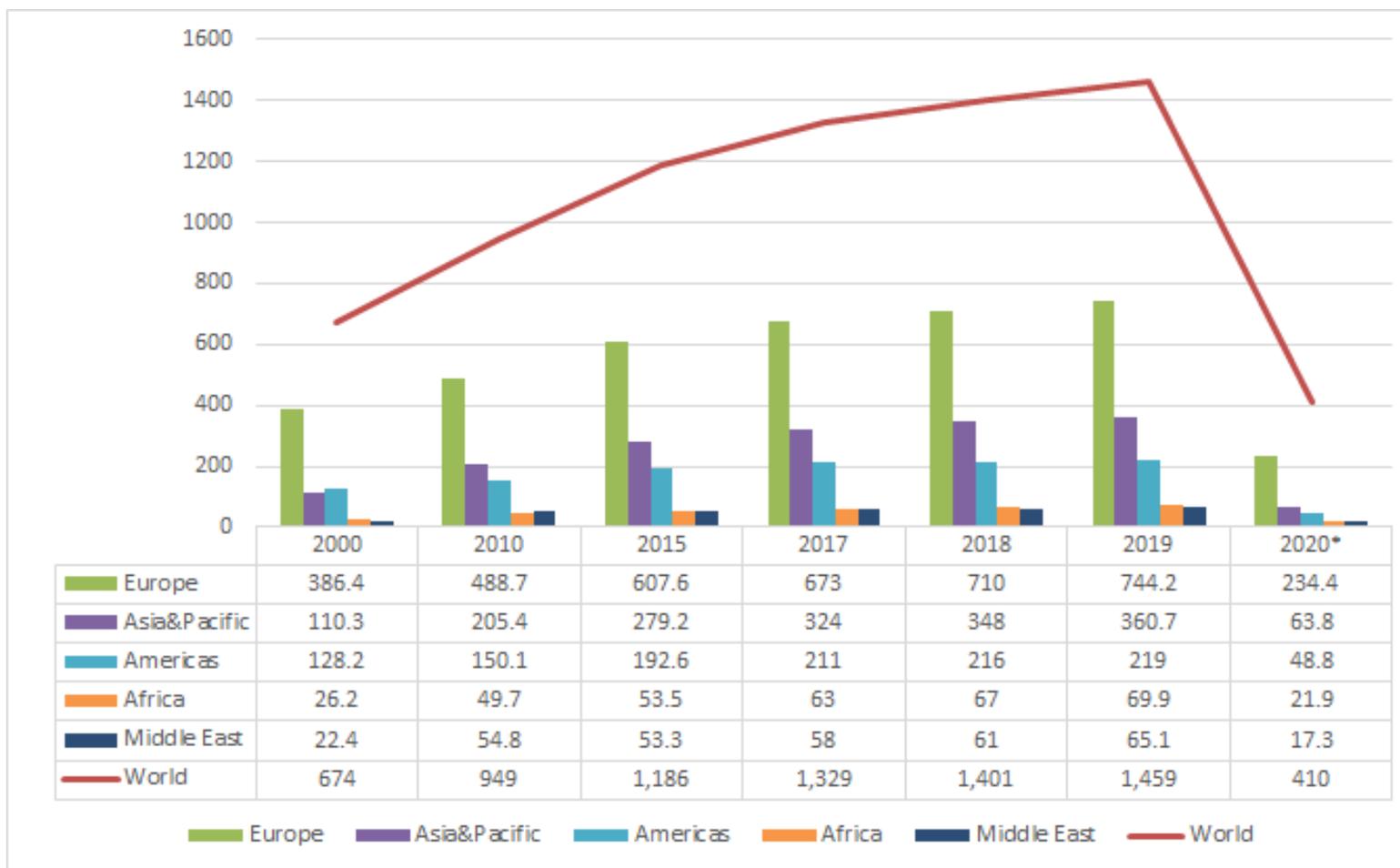
RECOVERY SCENERIOS - BOOM



RECOVERY SCENERIOS - GRADUAL



COVID-19 IMPACT ON GLOBAL TOURISM

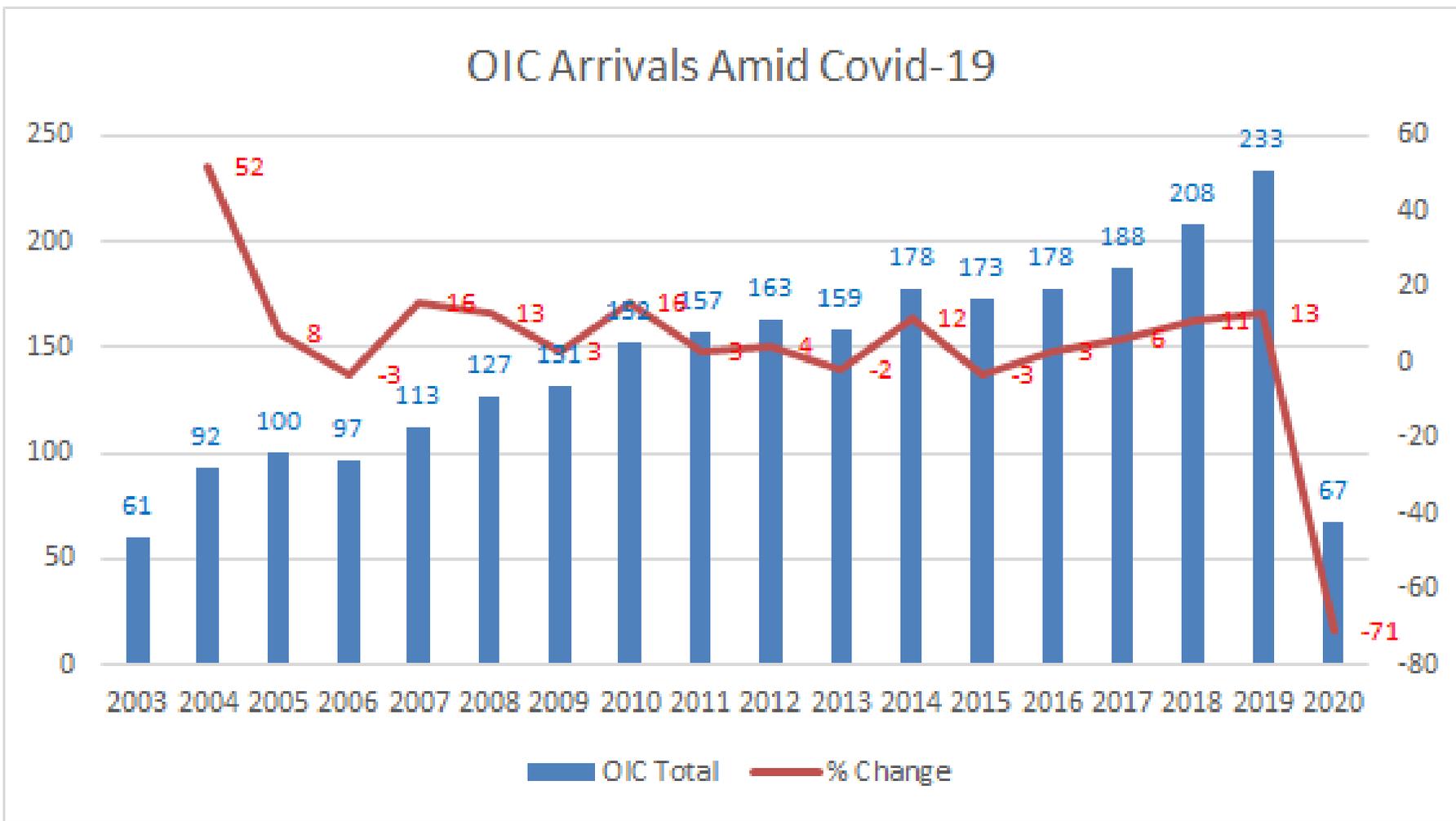


GLOBAL AND REGIONAL TOURISM

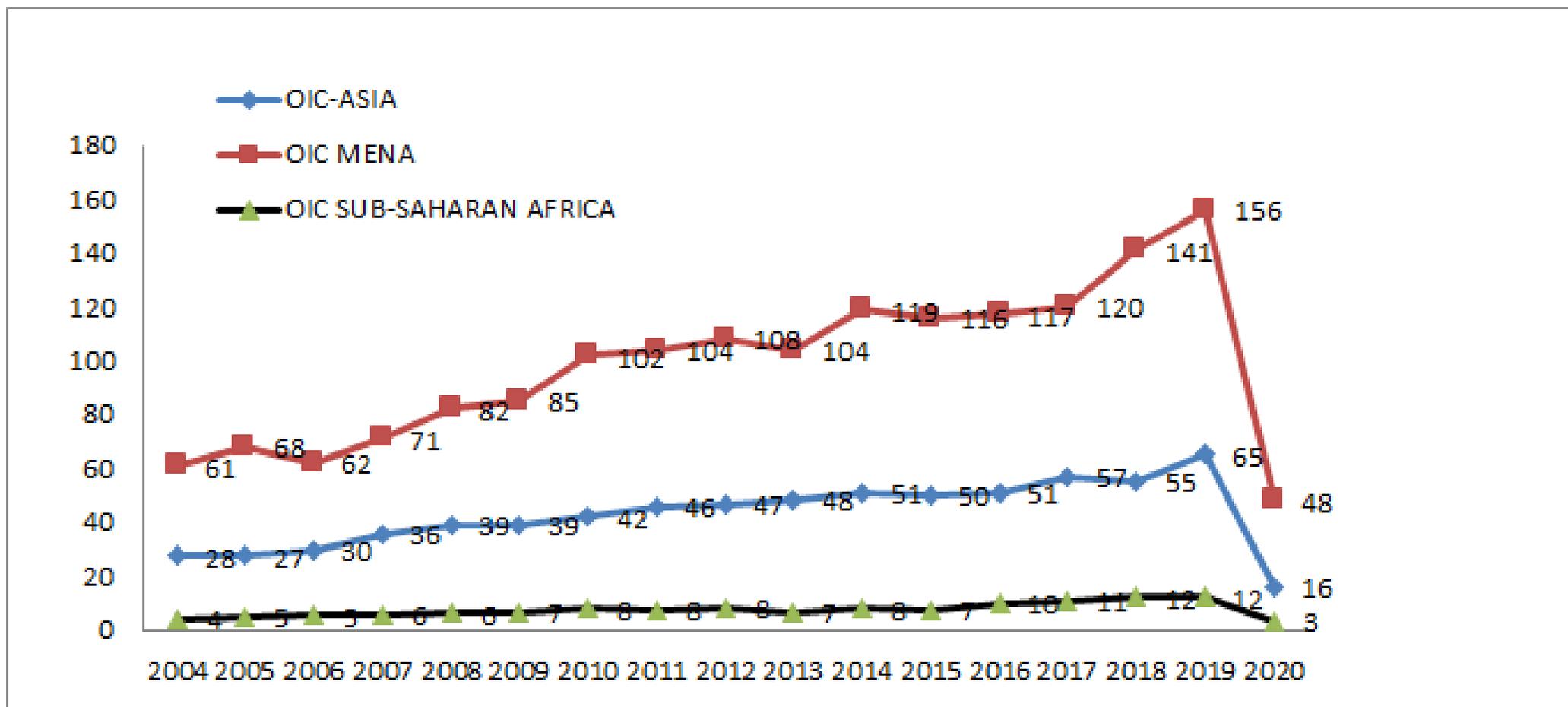


Arrivals	2000	2010	2015	2017	2018	2019	2020*	19/20*	(%)
World	674	949	1,186	1,329	1,401	1,459	410	-72%	100
Europe	386.4	488.7	607.6	673	710	744.2	234.4	-68.5%	50.7
Asia & Pacific	110.3	205.4	279.2	324	348	360.7	63.8	-82.3%	24.8
Americas	128.2	150.1	192.6	211	216	219	48.8	-67.7%	15.4
Africa	26.2	49.7	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

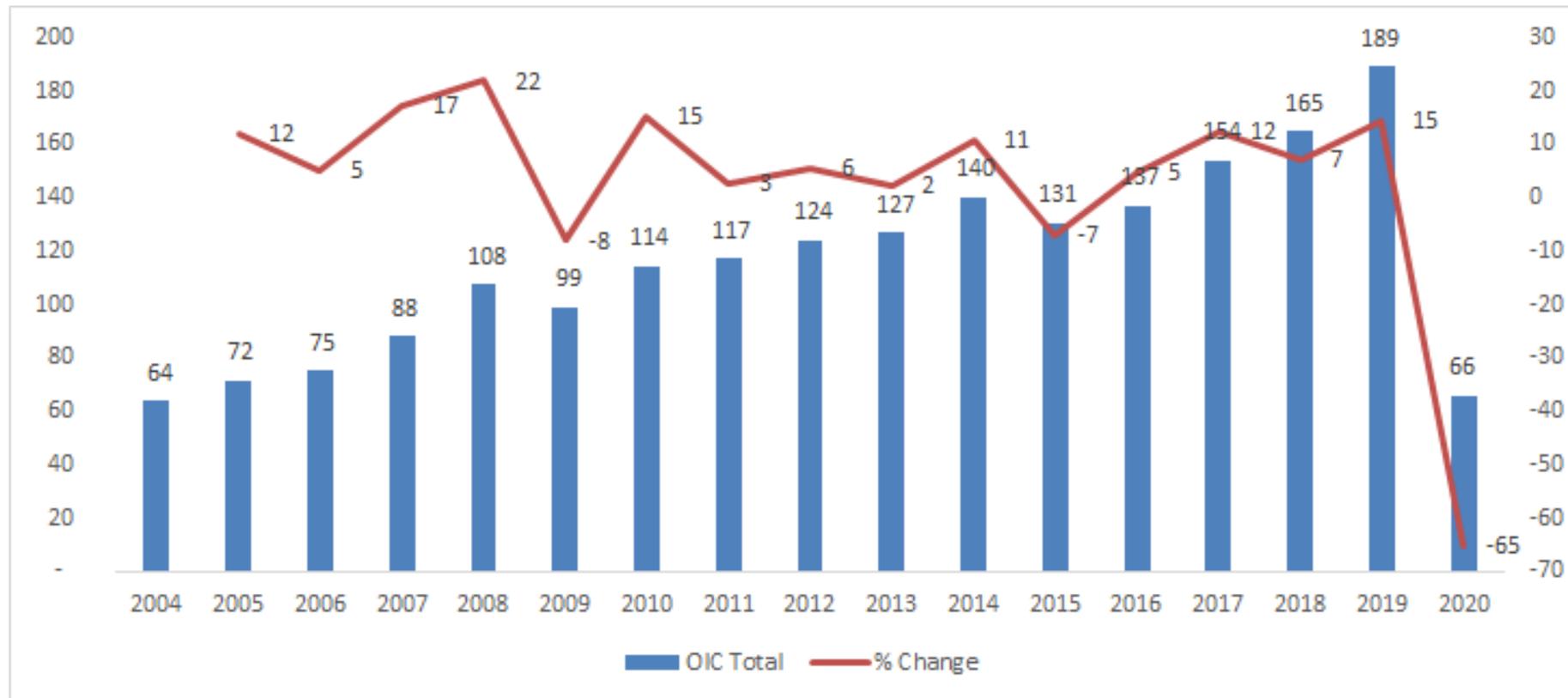
IMPACTS OF COVID-19 ON OIC TOURISM



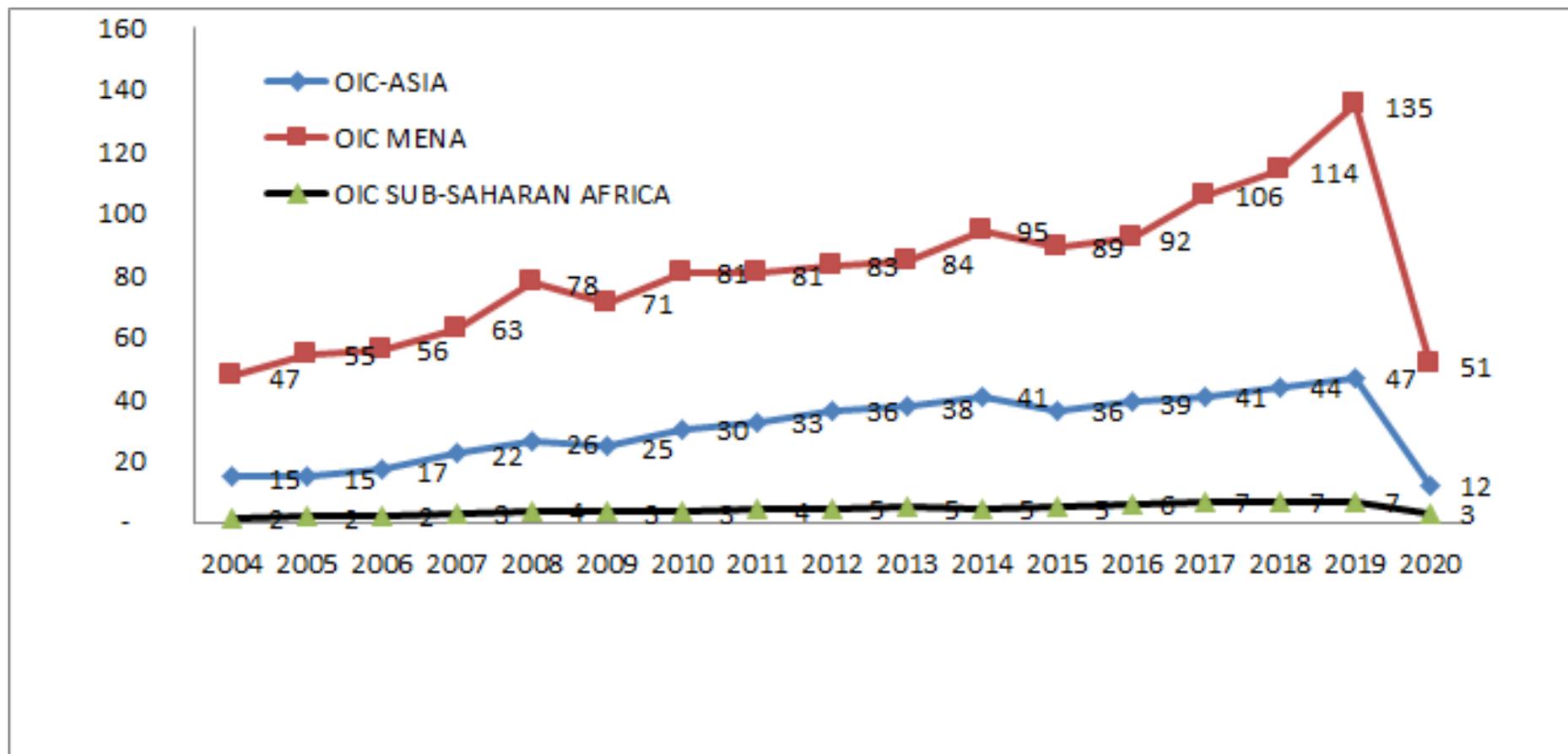
REGIONAL OIC ARRIVALS



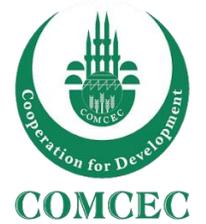
OIC TOURISM RECEIPTS



REGIONAL OIC TOURISM RECEIPTS



MITIGATION STRATEGIES



Collective and coordinated response

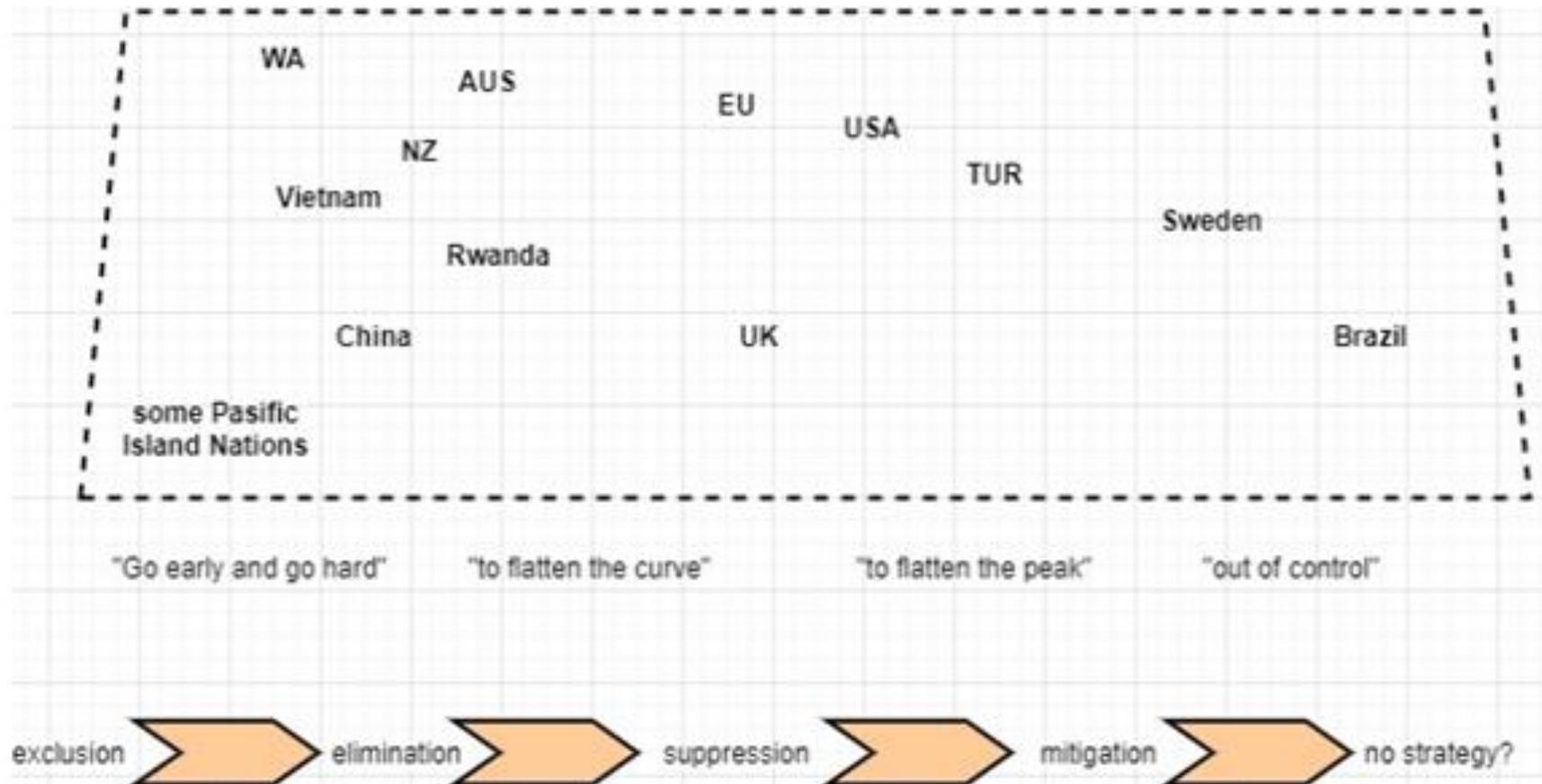
- Governments
- Private Sector

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

Renew

Recover

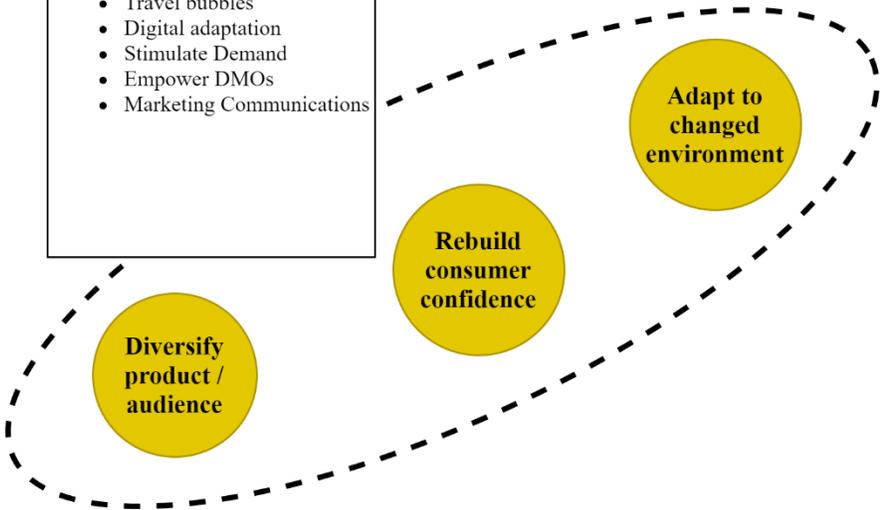
- Closing travel borders
- Lockdown
- Home / digital working
- COVID-19 testing
- COVID-19 vaccination
- COVID-19 vaccine passports

Keep People Safe

- Financial Support
- Tax deferrals
- HR Subsidies
- Prohibition of dismissal

Keep businesses functional

- Plan re-opening
- Travel bubbles
- Digital adaptation
- Stimulate Demand
- Empower DMOs
- Marketing Communications



GENERIC GOVERNMENT MEASURES

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



TOURISM SPECIFIC GOVERNMENT SUPPORT

Stimulating Demand

- Promotion, vouchers, extended holidays, diplomacy

Financial Support

- Tourism specific credits and subsidies, tax holidays and discounts, Earmarked support, Advance purchase

Human Resources

- Wage support, suspension of layoffs, training, social security

Legislative

- Vaccine passport, refund delays, holiday insurances, loan guarantees

Operational

- Certification, medical support and advise, audits, staff vaccination.

PRIVATE SECTOR MITIGATION STRATEGIES

Reducing costs

- Limiting services and capacities, reducing quality

Operational

- Hygiene standards, service quality, mergers, cancellation policies, ICT

Marketing

- Promotion, diversification

Financial

- Debt restructuring, government support, Postponed investments



TRANSFORMATIONS FACING TOURISM



New standards

New expectations

Alteration in markets and products

Automation

Importance of domestic tourism

Importance of Collaboration and destination governance



MITIGATION IN CASE COUNTRIES AND POLICY RECOMMENDATIONS FOR OIC COUNTRIES

COMCEC COORDINATION
OFFICE
Prepared by: Assoc.Prof. Dr.
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METHODOLOGY



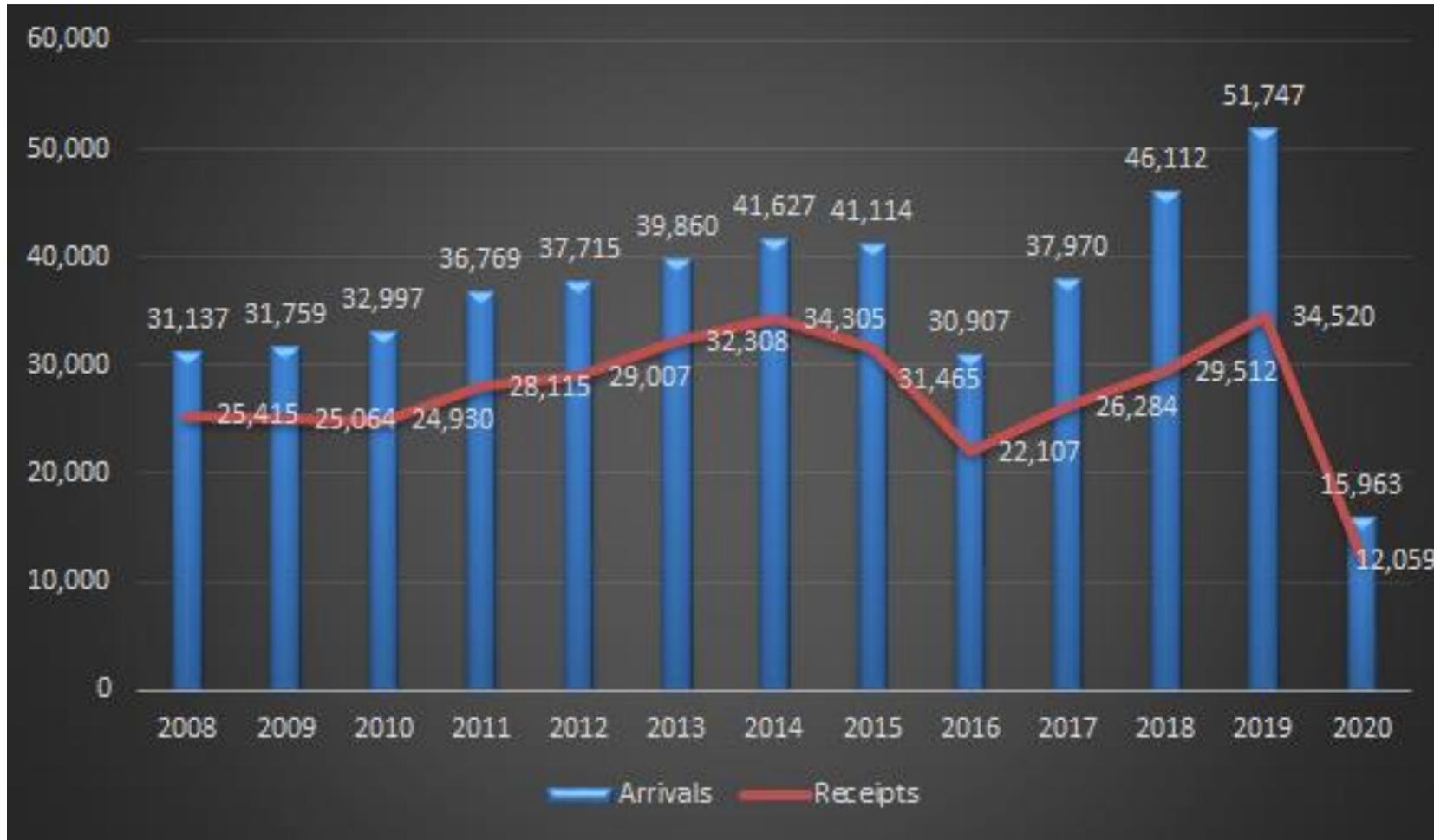
Objectives

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

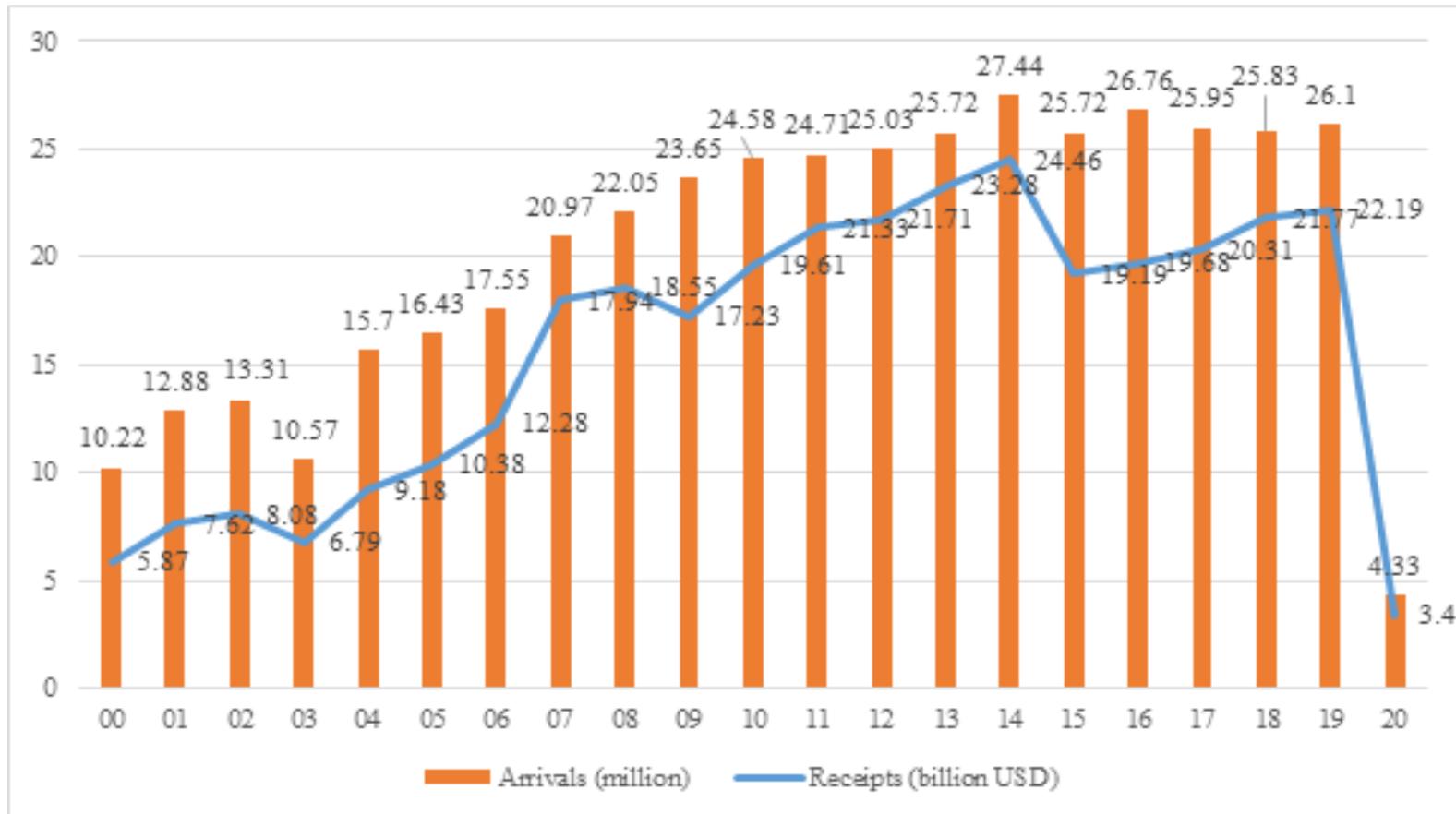
Case Countries

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

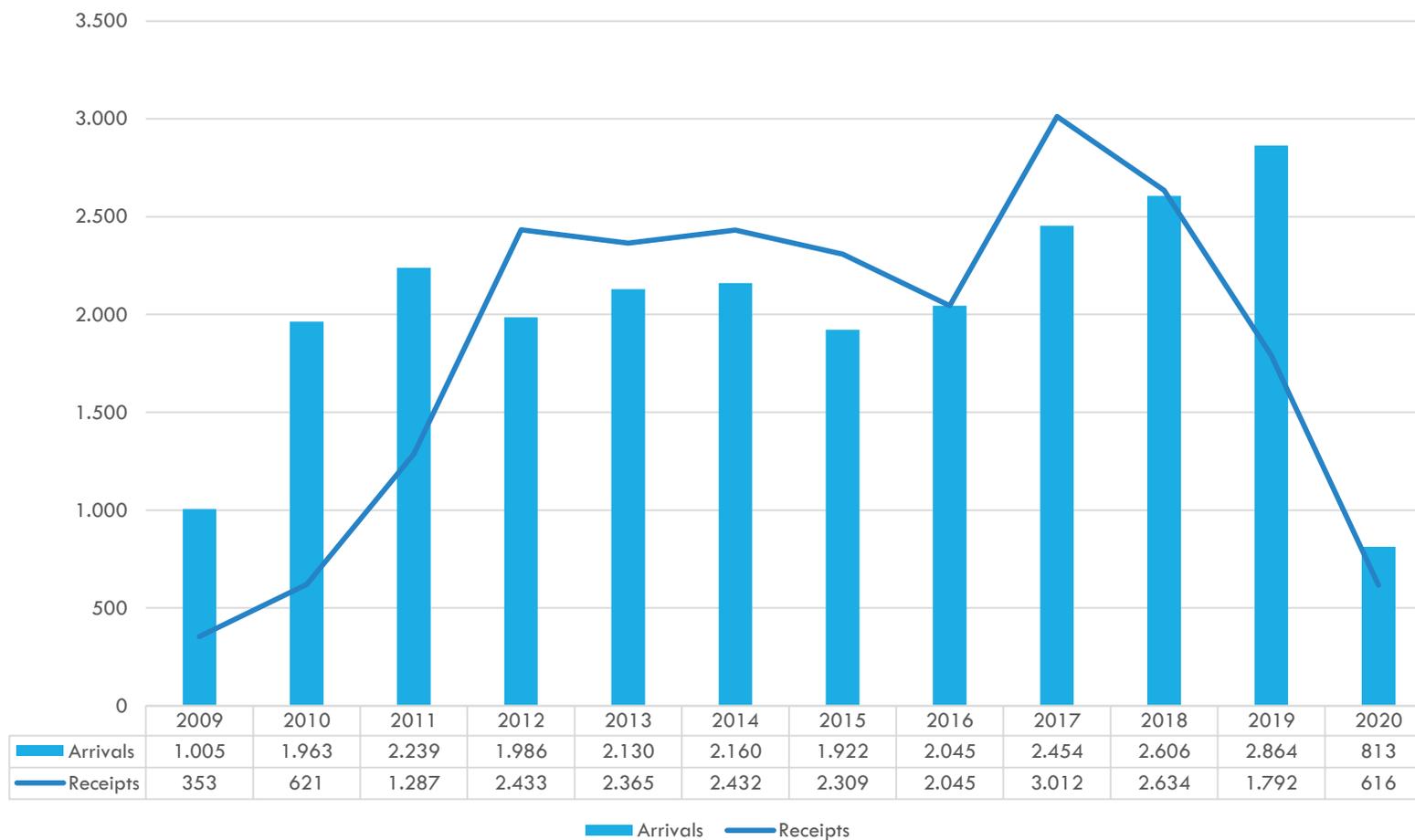
THE TURKISH CASE



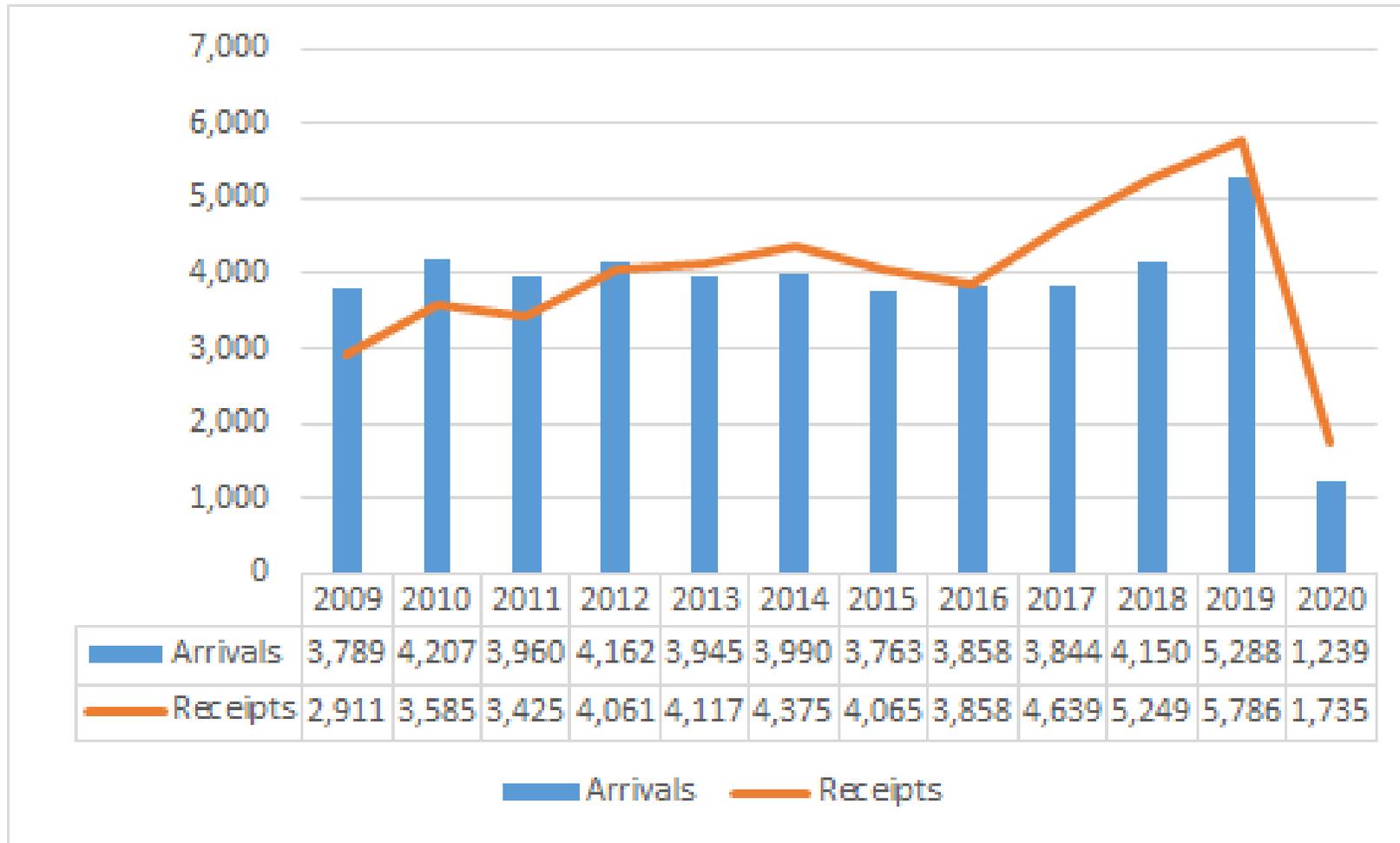
THE MALAYSIAN CASE



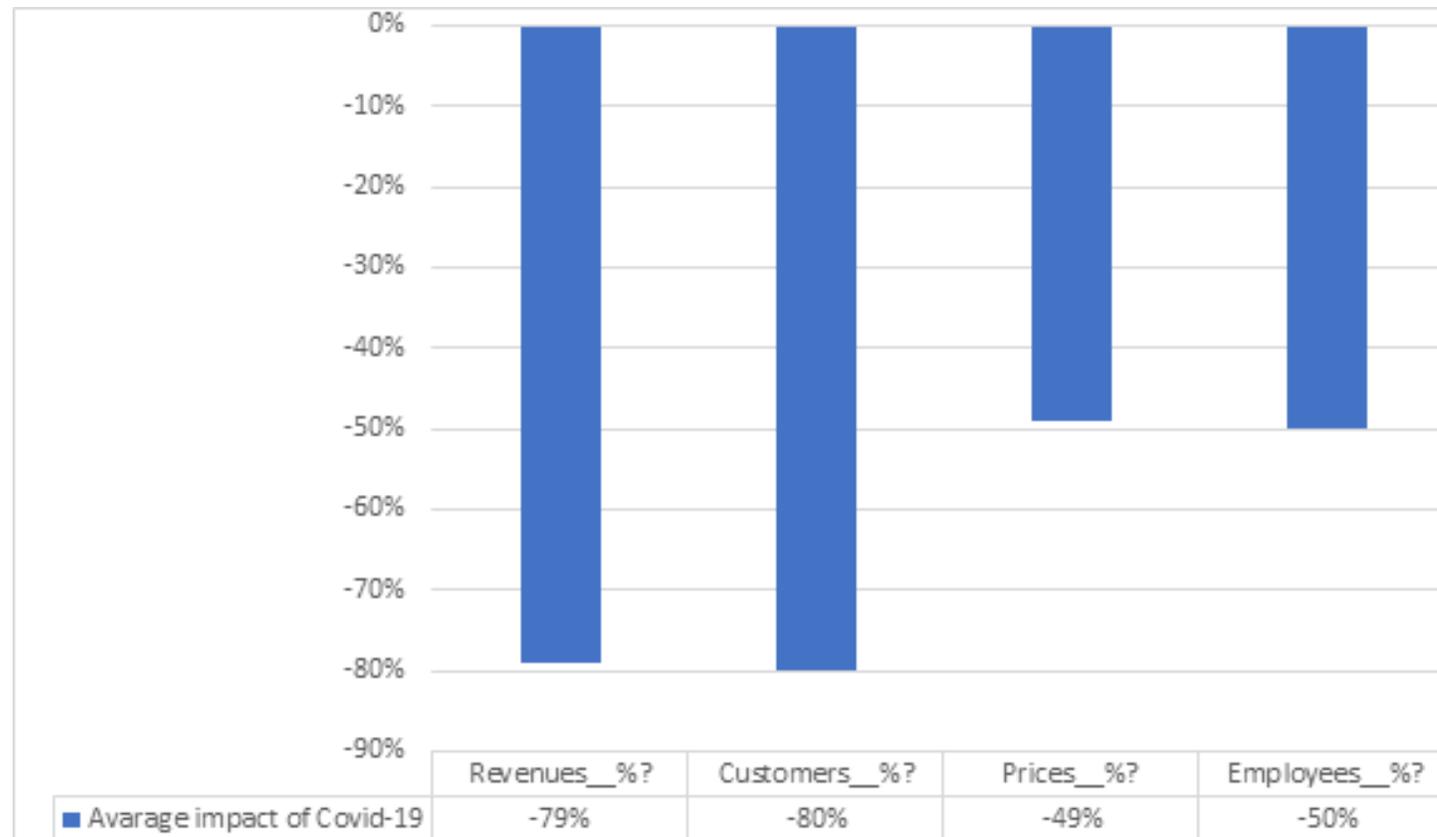
THE AZERBAIJAN CASE



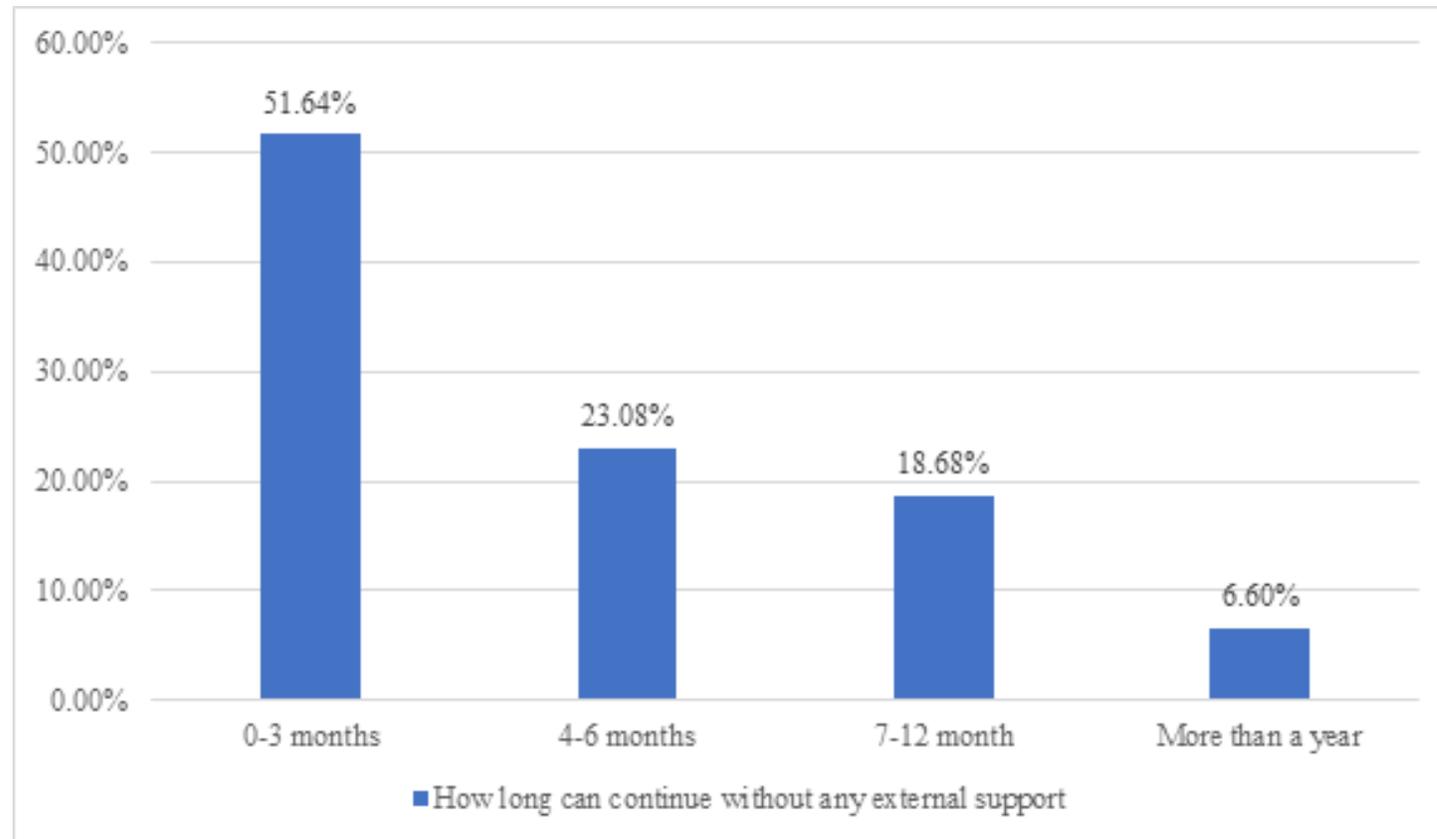
THE JORDAN CASE



REVENUE LOSS IN TOURISM INDUSTRY



OPERATIONAL SURVIVAL



CRISES RESILIENT TOURISM ORGANIZATIONS



Business size

Location

Affiliation

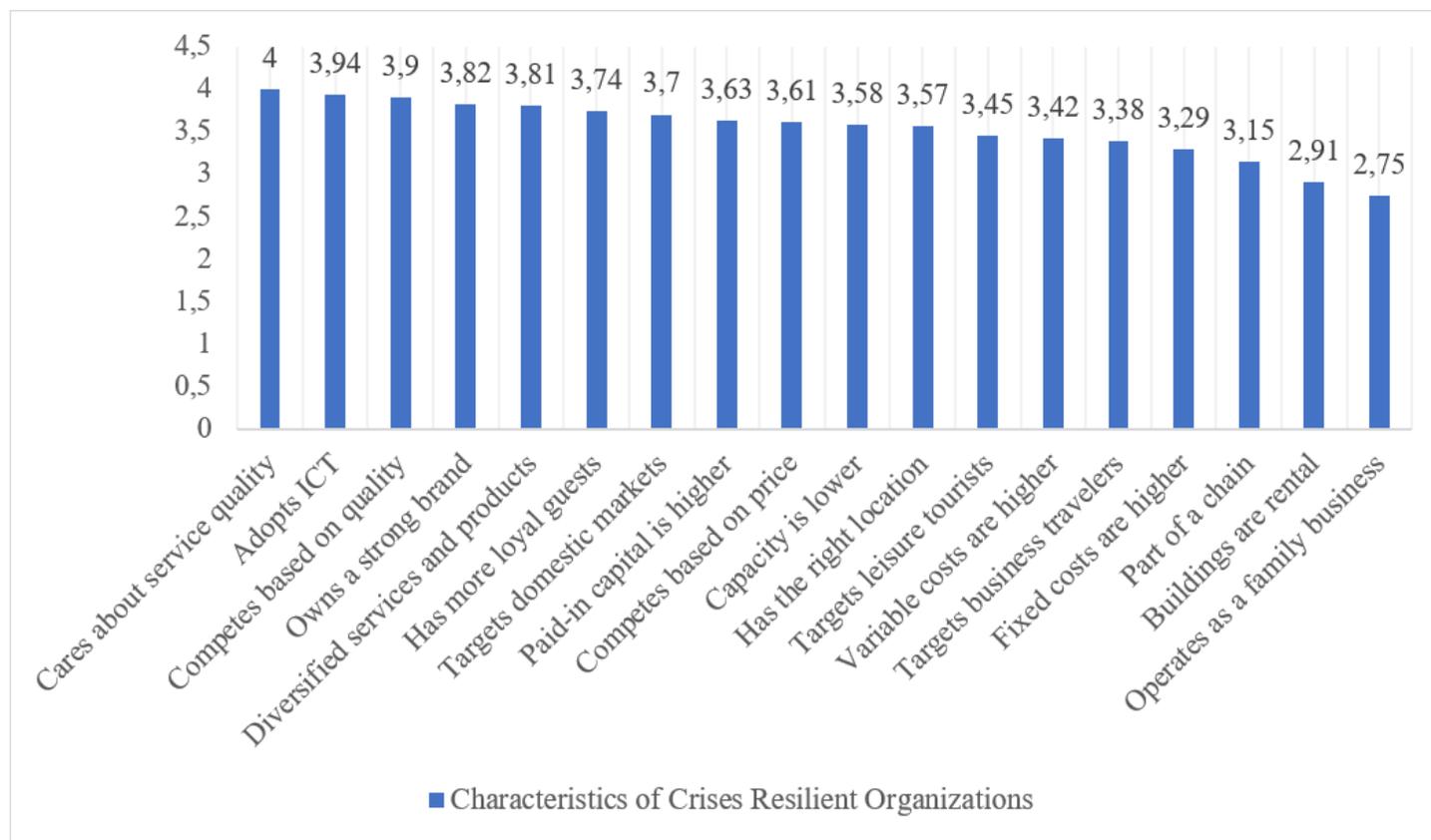
Market segments

Capital structure

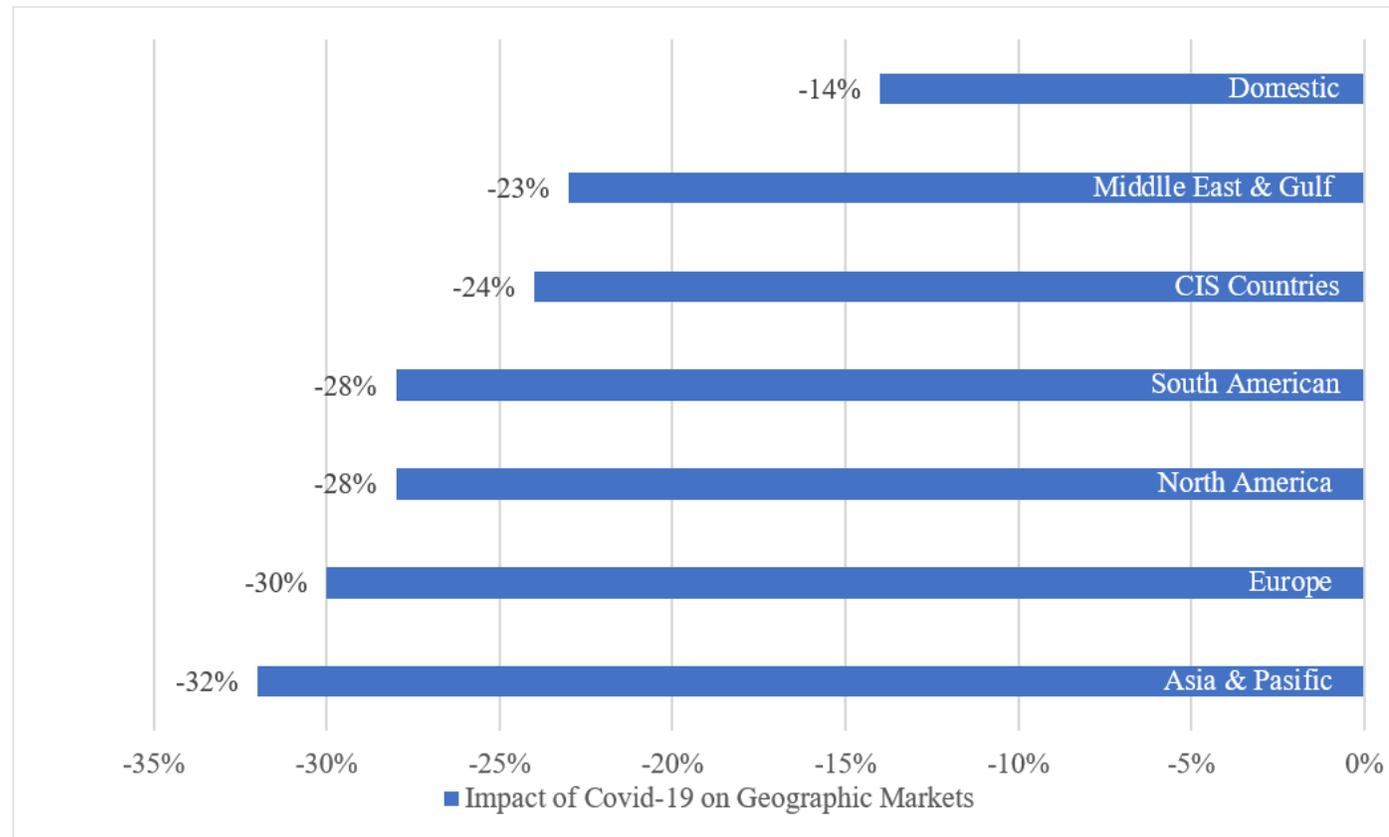
Organizational culture and flexibility

Ownership type of buildings

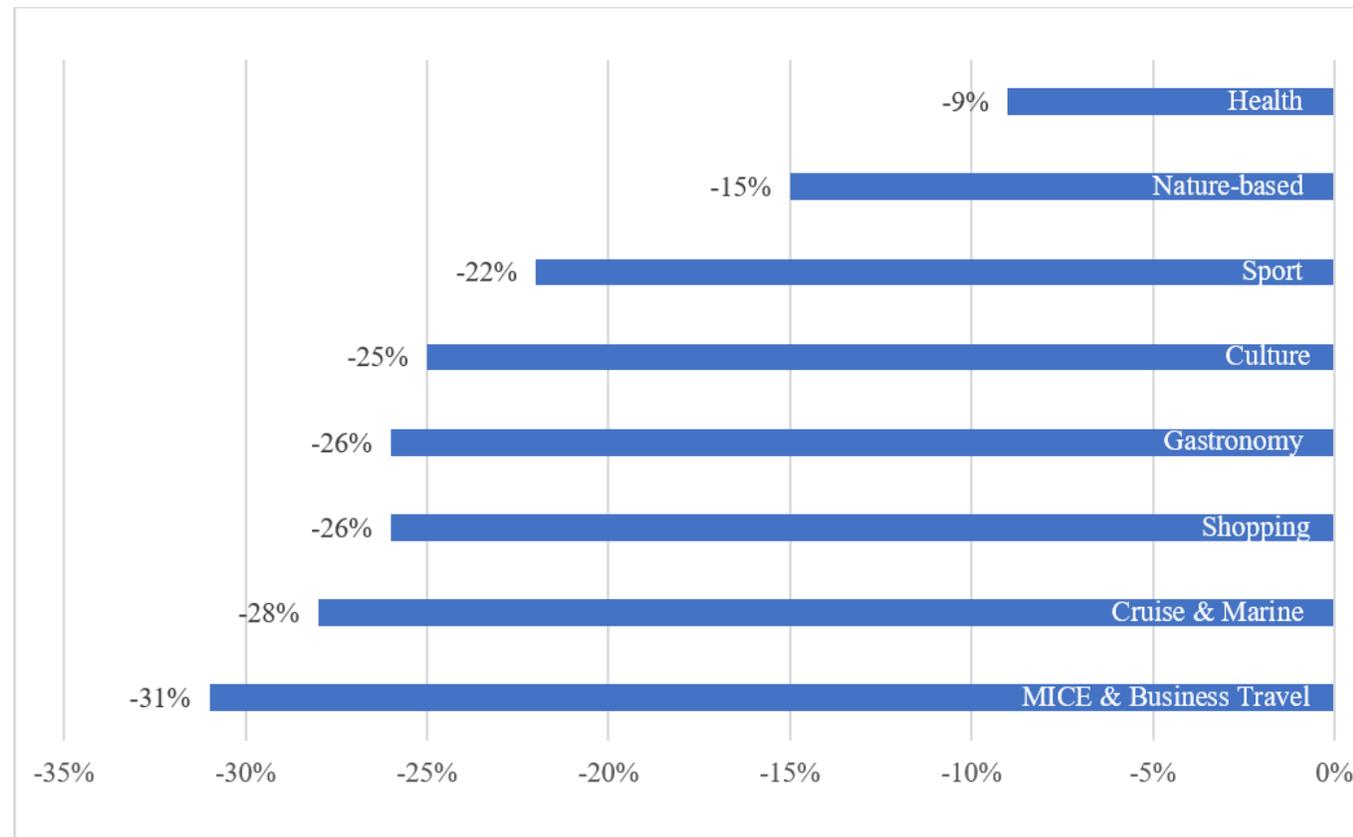
CRISES RESILIENT ORGANIZATIONS



TRANSFORMATION IN MARKETS



TRANSFORMATION IN MOTIVATIONS



INDUSTRY STRATEGIES



Restructuring debts

Reducing operating costs

Downsizing & Liquidation

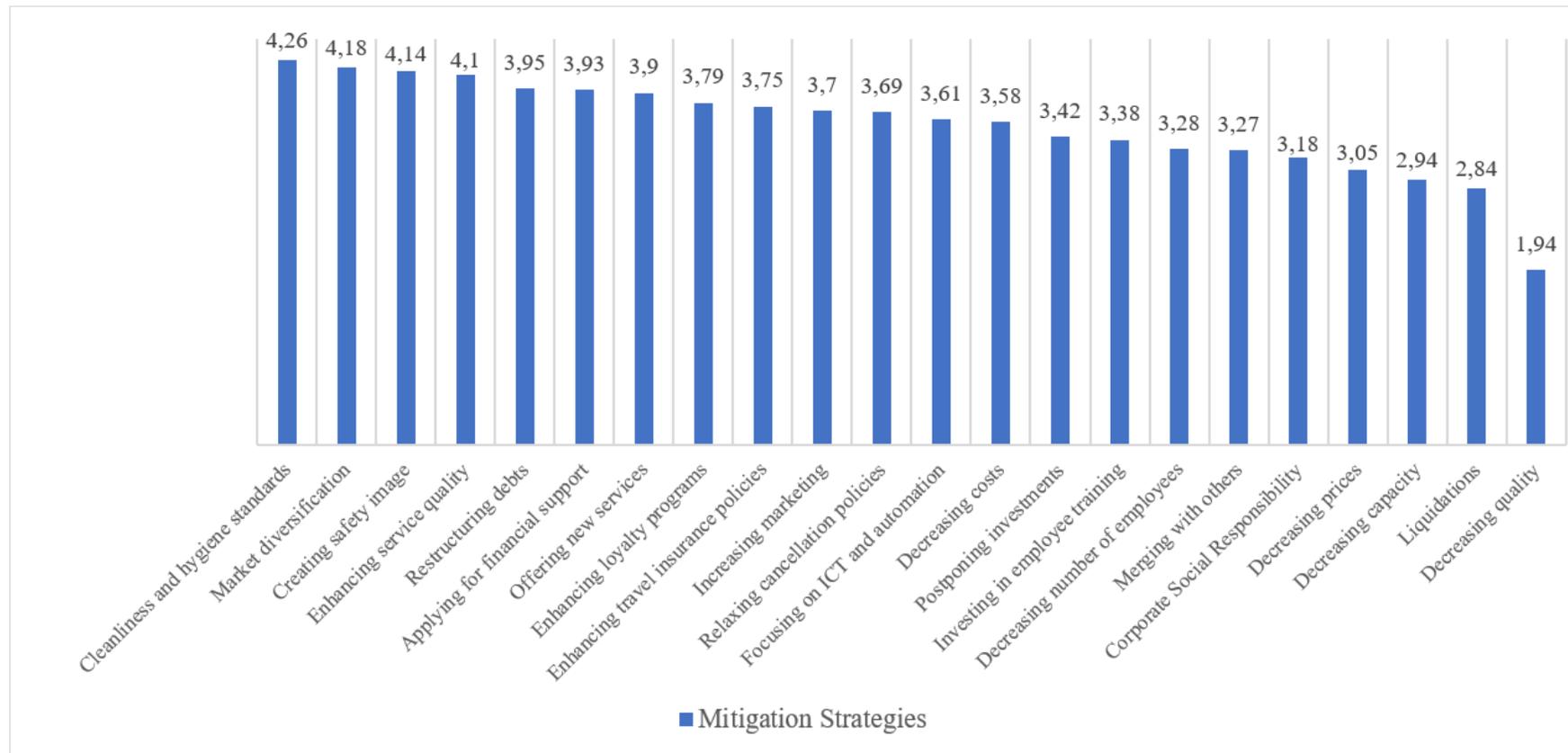
Hygiene and safety standards

Diversification

Enhancing quality

Relaxing cancellation policies

TOURISM INDUSTRY MITIGATION STRATEGIES



TRANSFORMATIONS IN THE INDUSTRY



Digital Transformations

Product Innovation

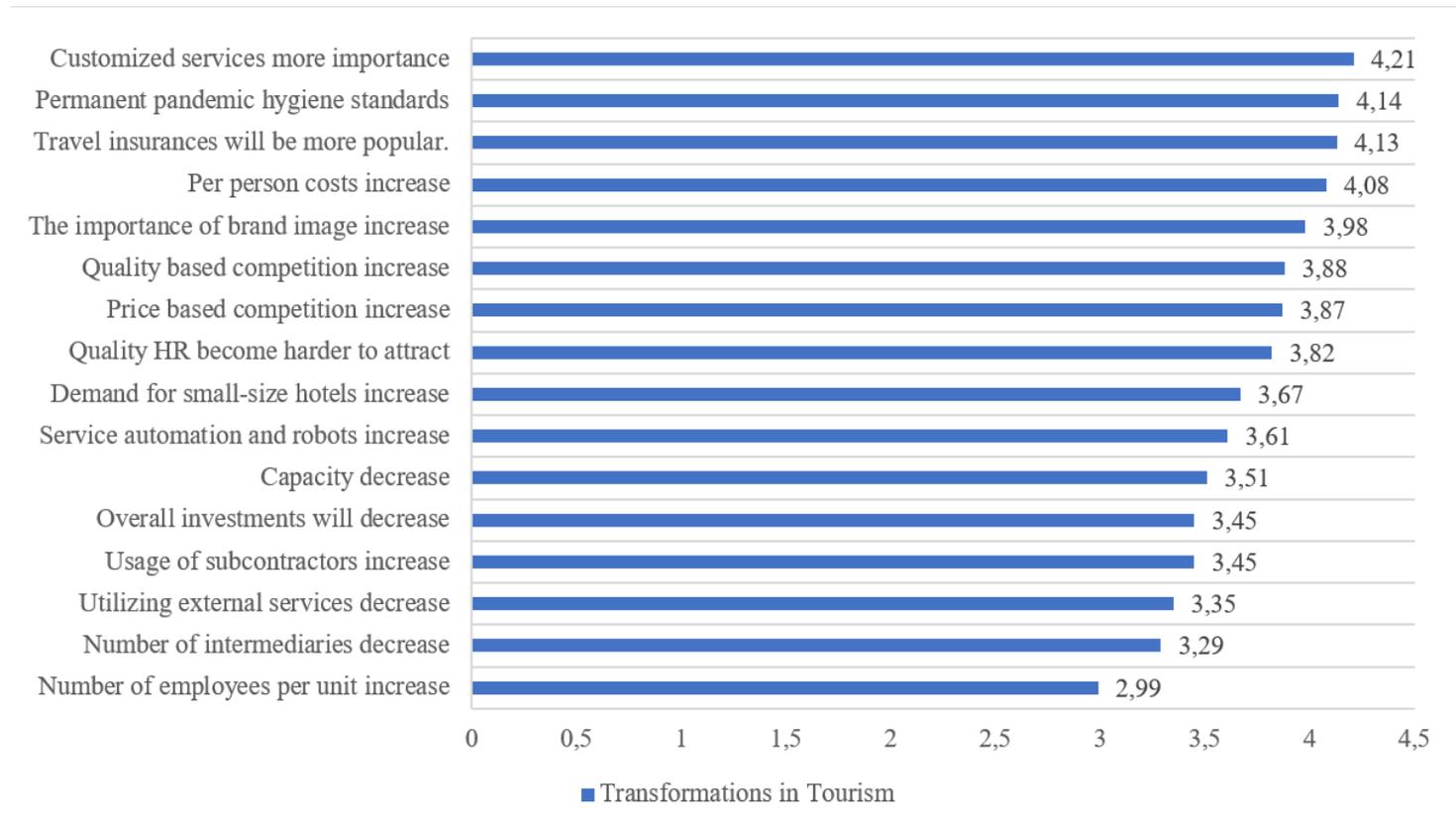
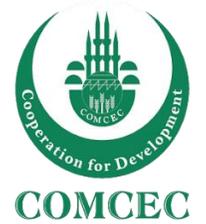
Market Transformations

Collaboration

Increased prices

Sustainability

TRANSFORMATIONS IN THE INDUSTRY



GOVERNMENT STRATEGIES



Short-term work allowance

Tax reduction and deferrals

Credit facilities

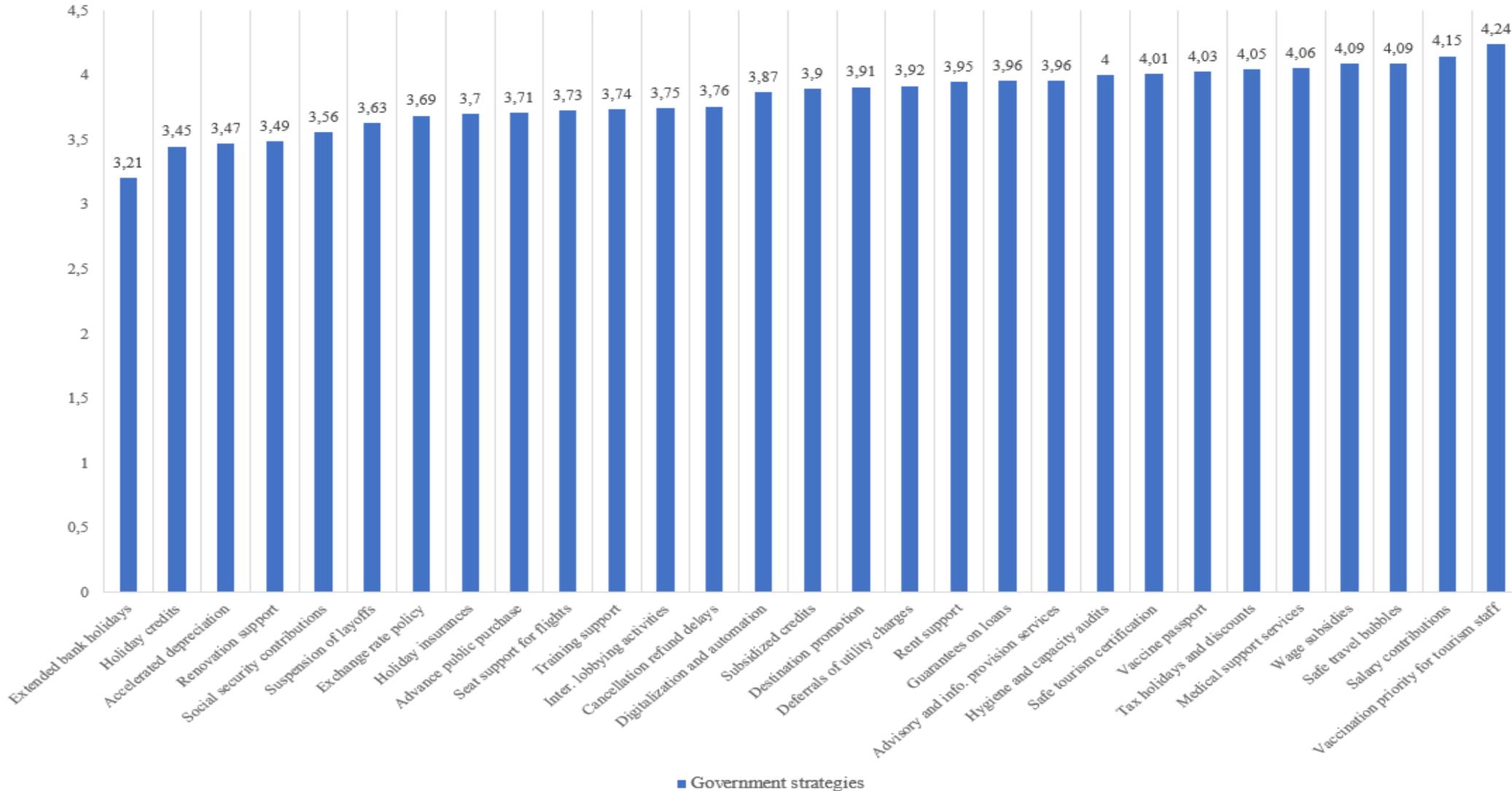
Postponing cancellation refunds

Safe tourism and vaccination priority

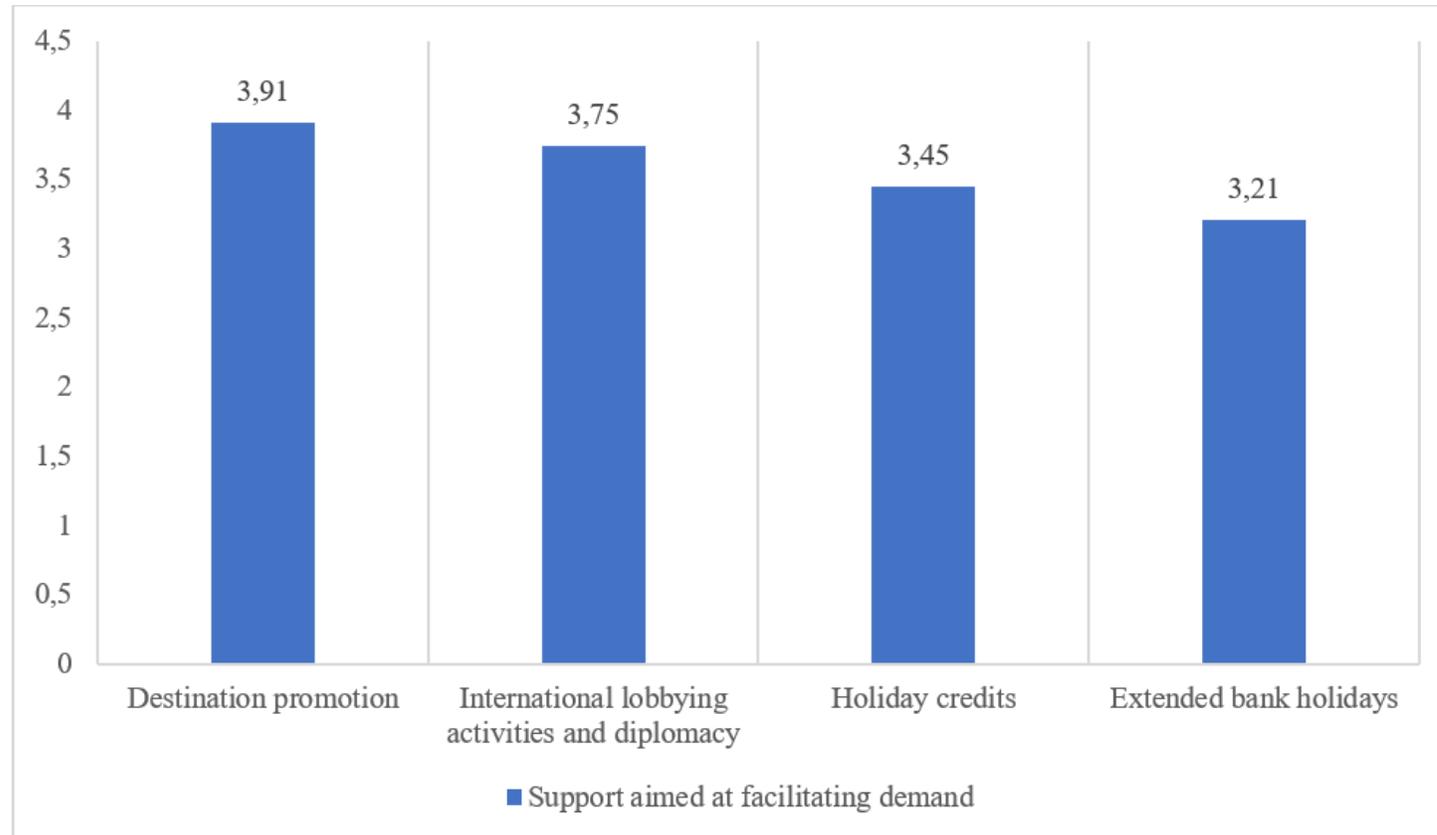
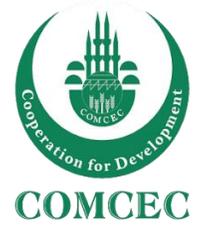
International PR and diplomacy

Selective subsidies

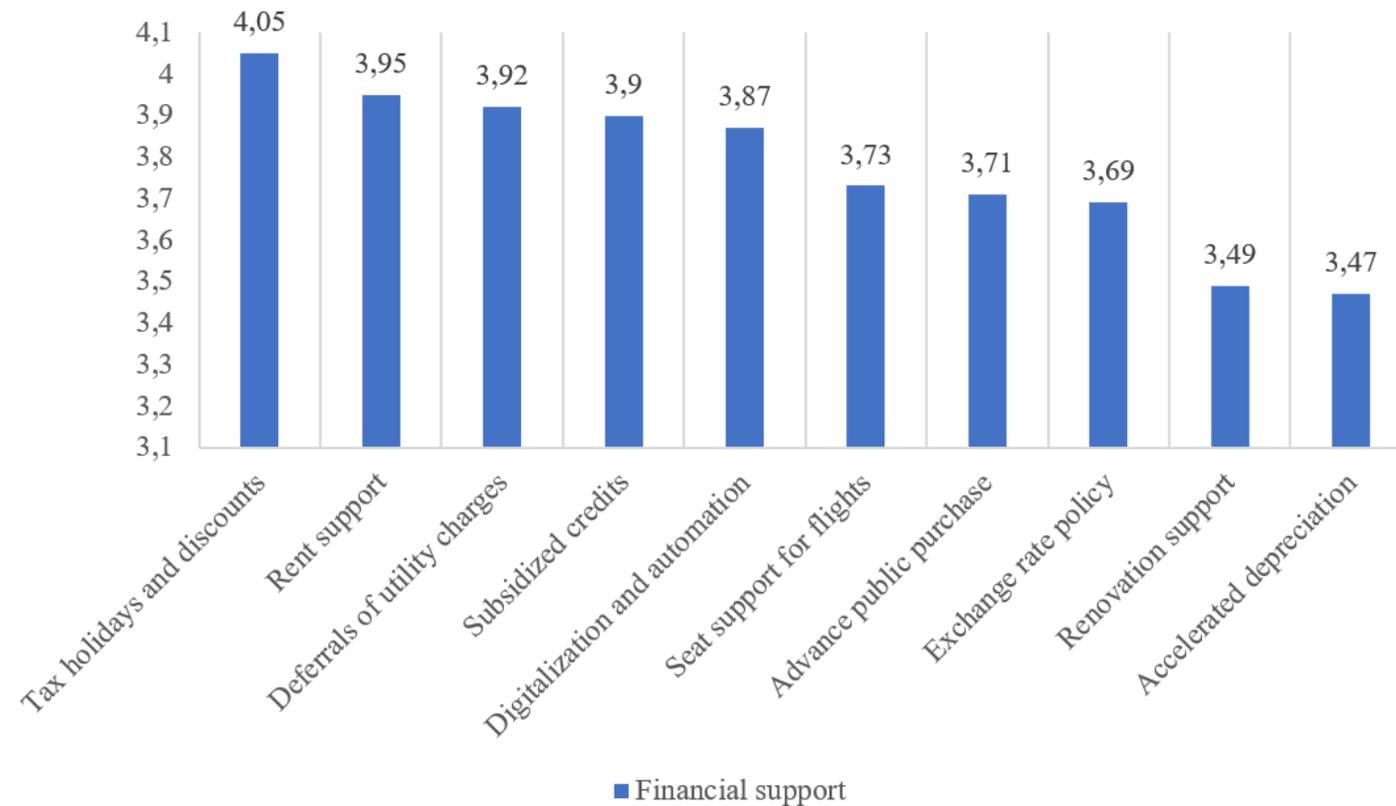
GOVERNMENT STRATEGIES



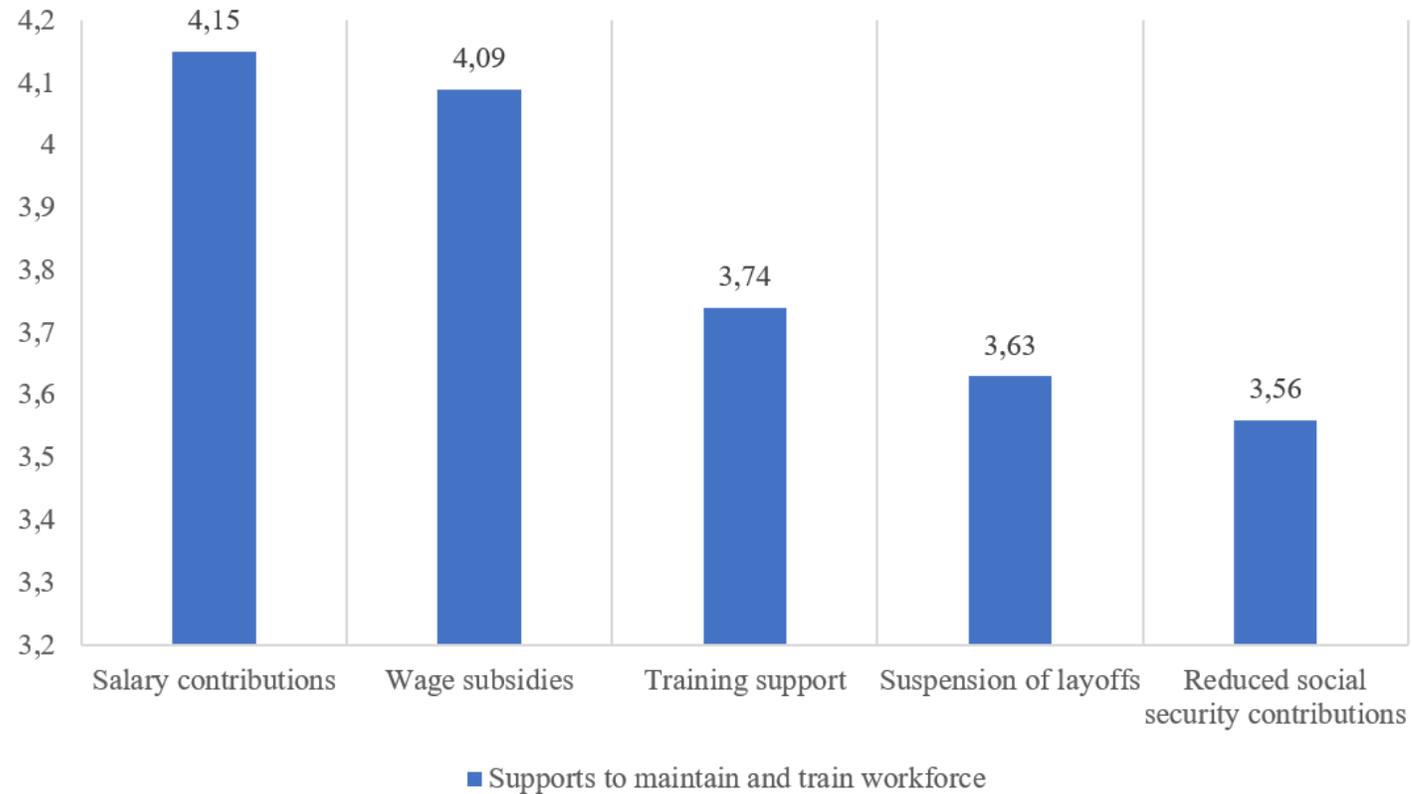
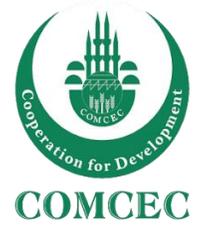
STIMULATING DEMAND



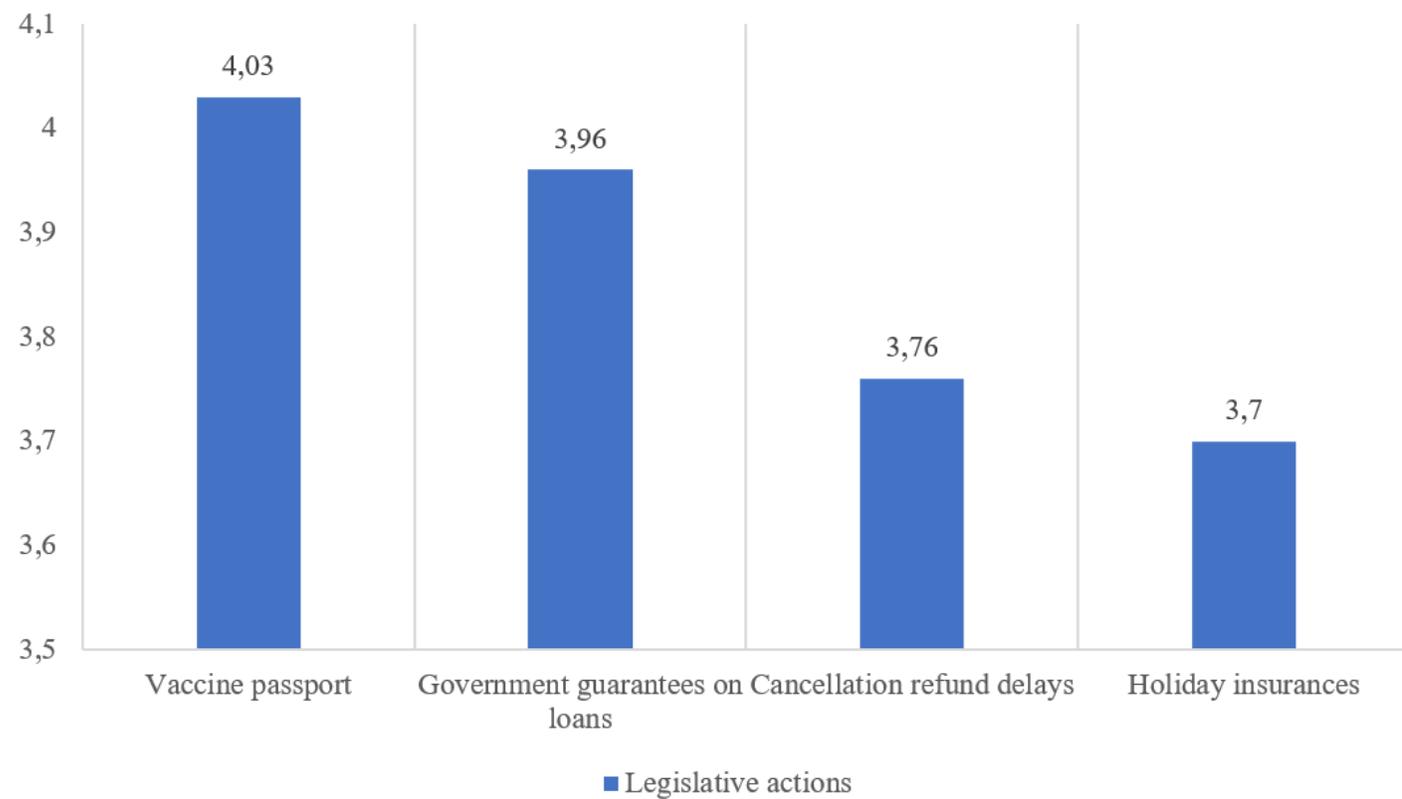
FINANCIAL SUPPORT



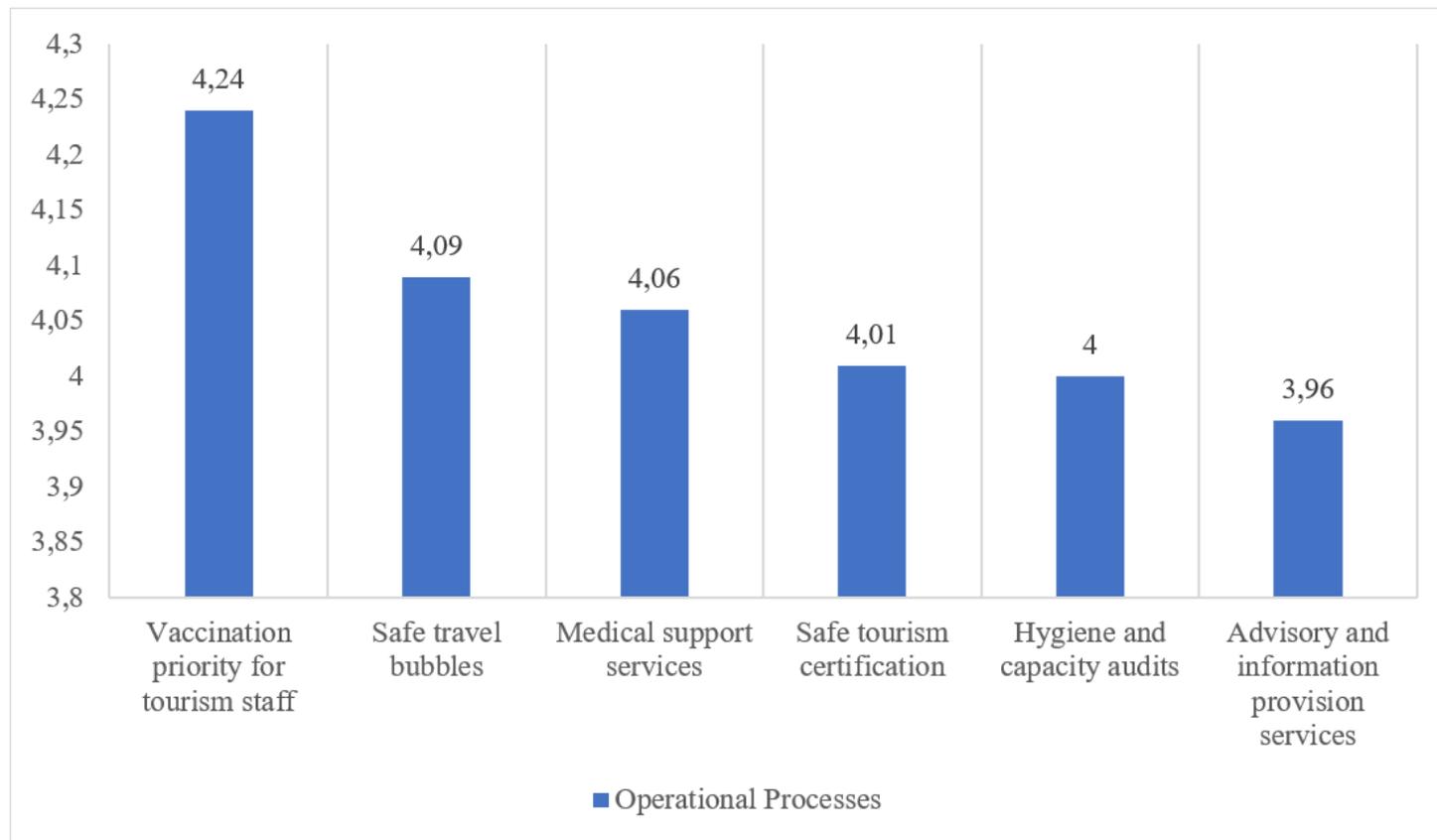
WORKFORCE SUPPORT



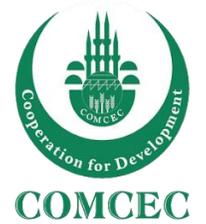
LEGISLATIVE ACTIONS



OPERATIONAL SUPPORT



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

Support tourism organizations

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.			
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			
GENERAL ASSEMBLIES	UP TO 300 PEOPLE	UP TO 300 PEOPLE	UP TO 300 PEOPLE	BANNED

POLICY RECOMMENDATIONS FOR OIC



Central oversight at OIC

Tourism Corridors and standards

Establish a Standard Semaphor within OIC

Marketing Communications and PR

Create safe image and build trust

Prioritize Markets and Products

Integration of Big data and ICT

Protect tourism organizations

Enhance tourist experience



COMCEC

THANK YOU FOR YOUR ATTENTION

