



# TOURISM MITIGATION STRATEGIES AMID COVID-19 IN OIC COUNTRIES



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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**

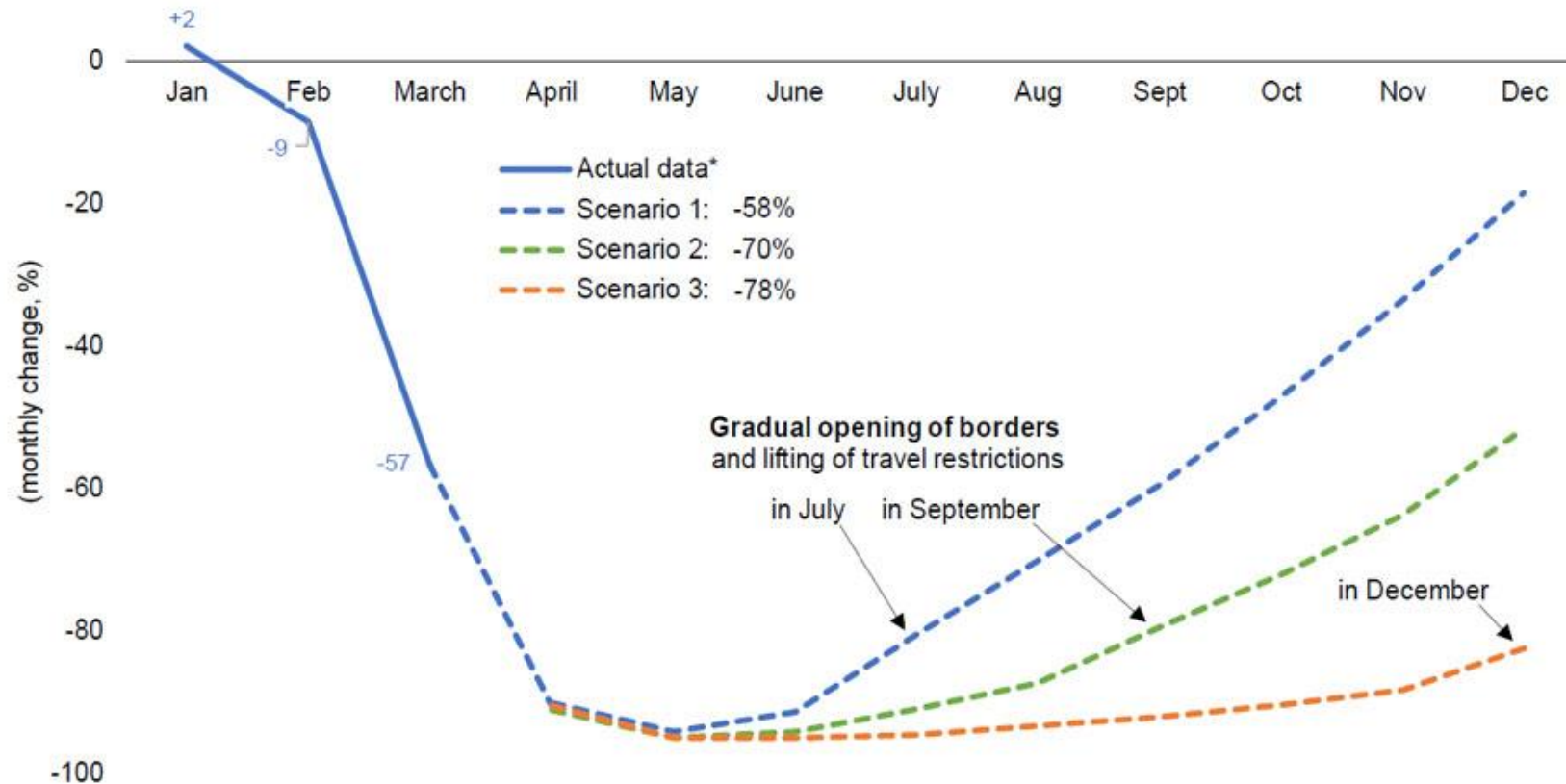
**Uncertainty (re-lockdowns, mutations)**

**Socio-economic impacts**

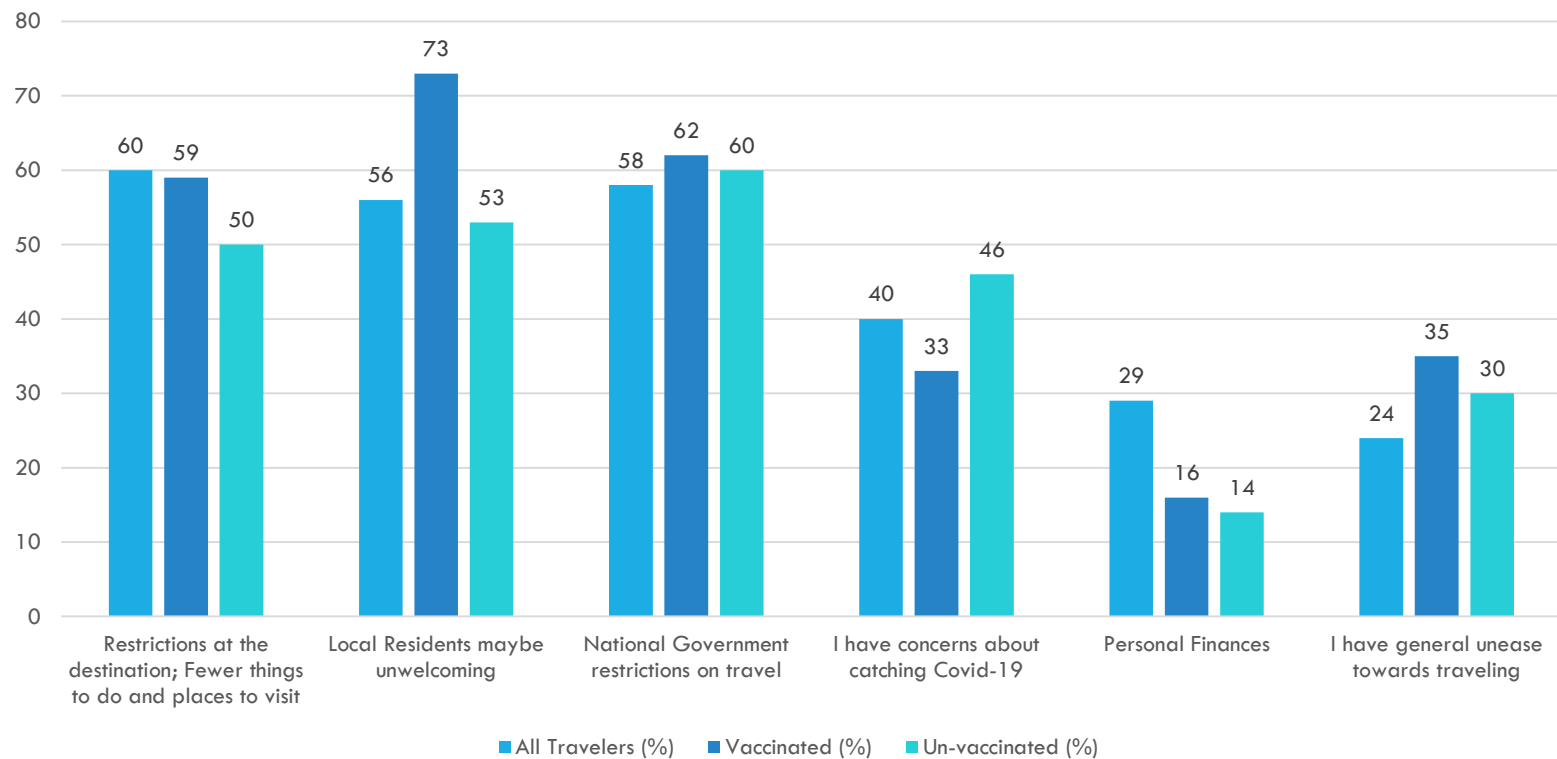
**Transformation and adoption**

**Government intervention**

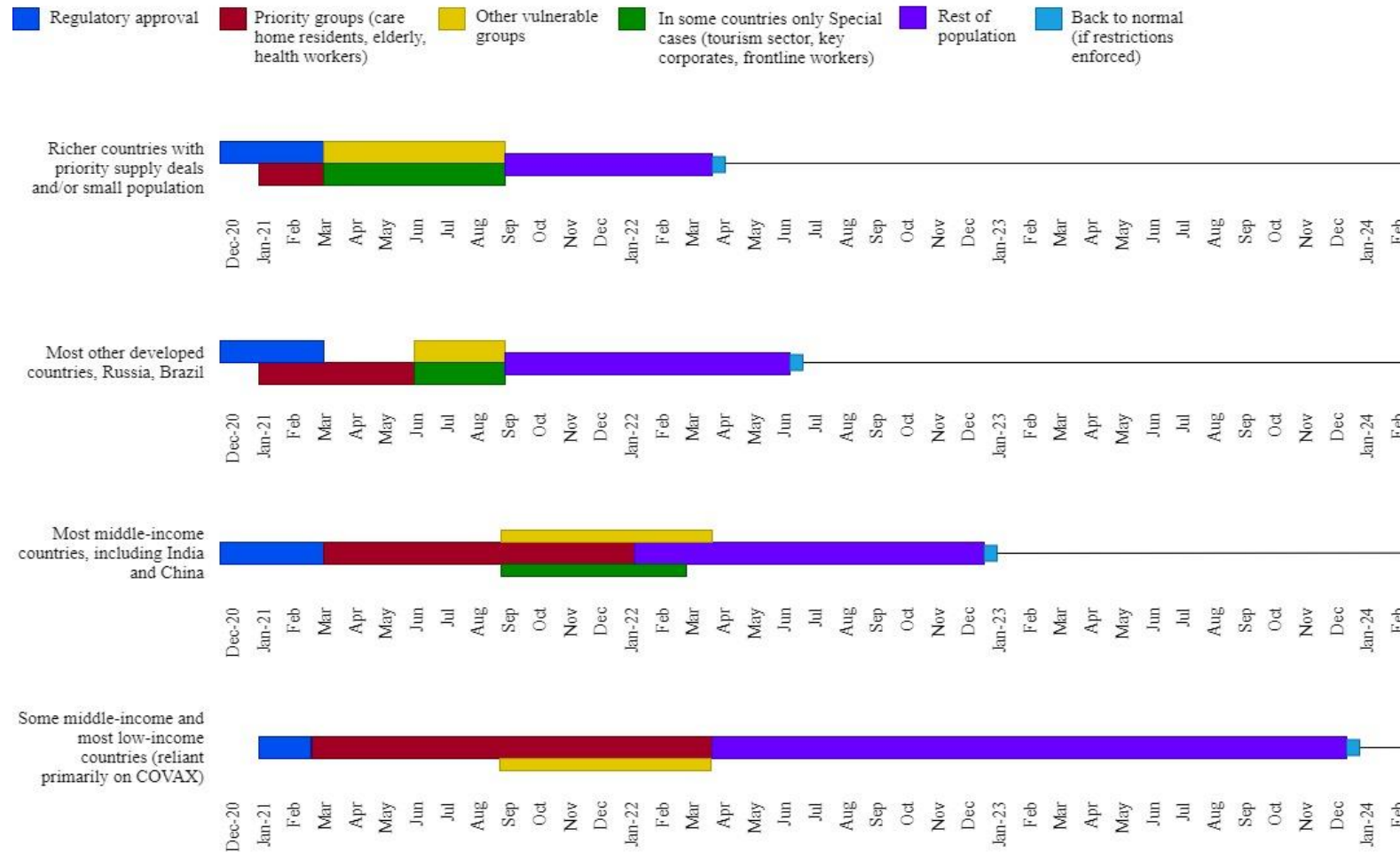
# IMPACTS OF COVID-19 ON GLOBAL TOURISM



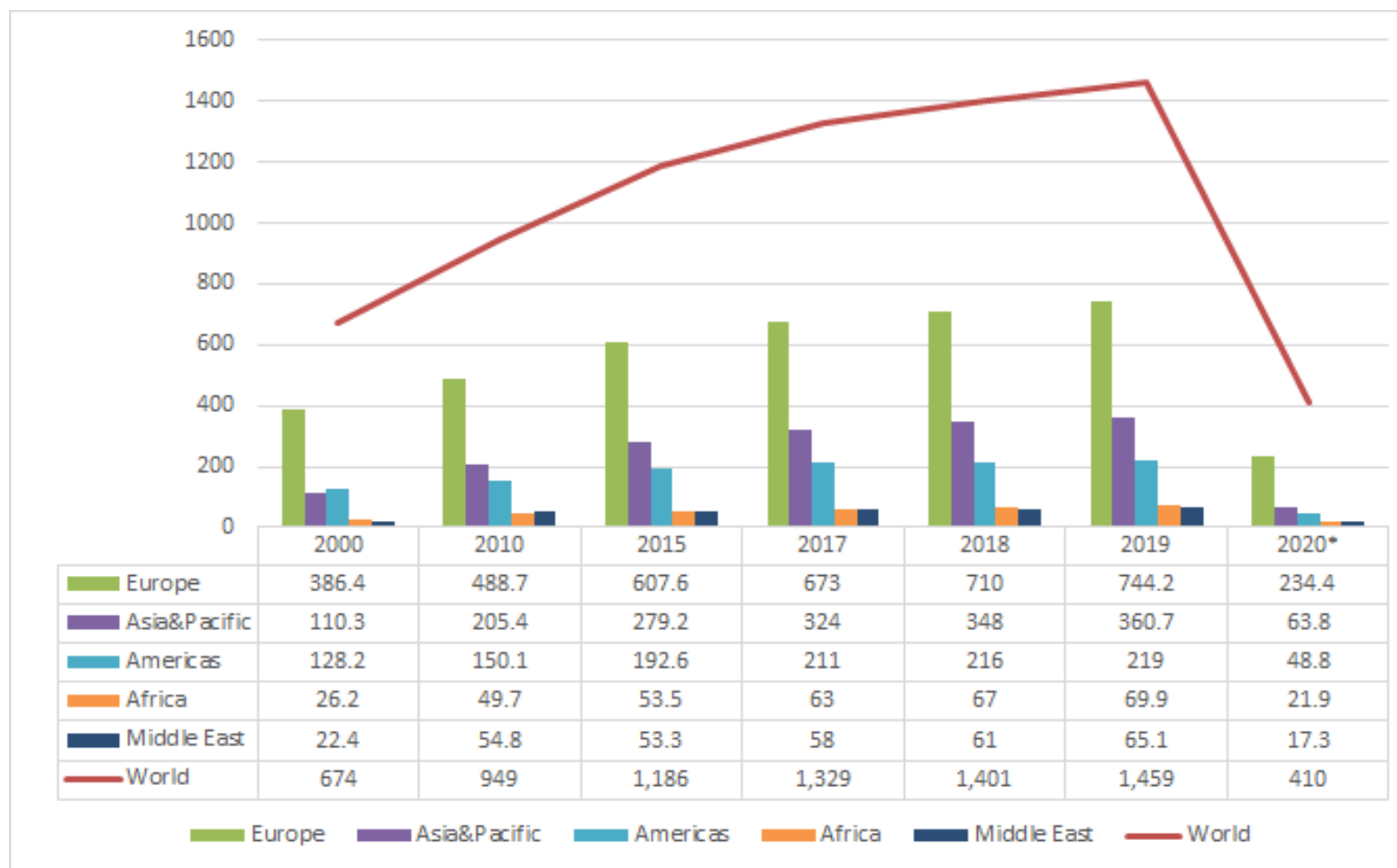
# RECOVERY SCENERIOS - BOOM



# RECOVERY SCENERIOS - GRADUAL



# COVID-19 IMPACT ON GLOBAL TOURISM



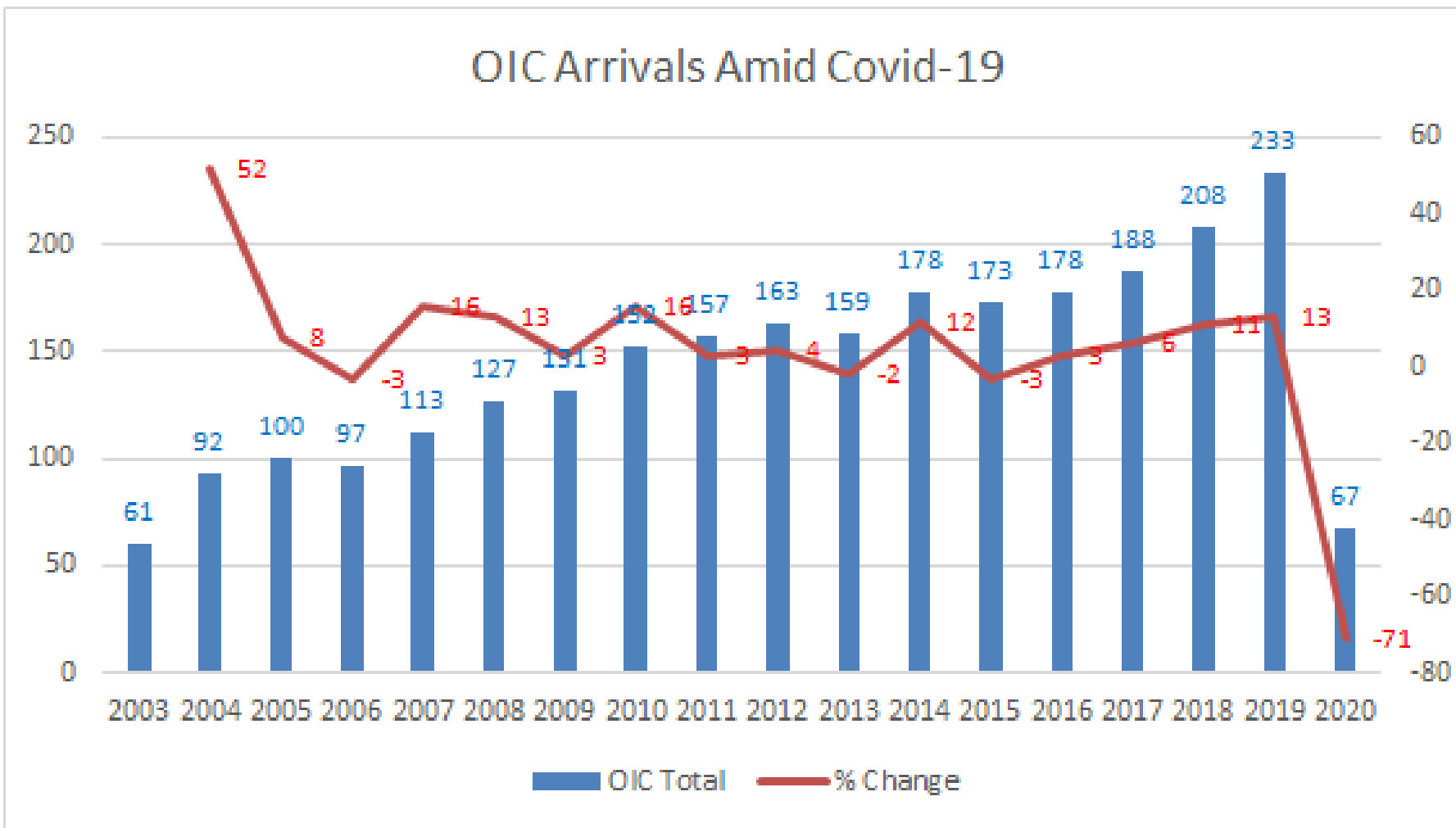


# GLOBAL AND REGIONAL TOURISM

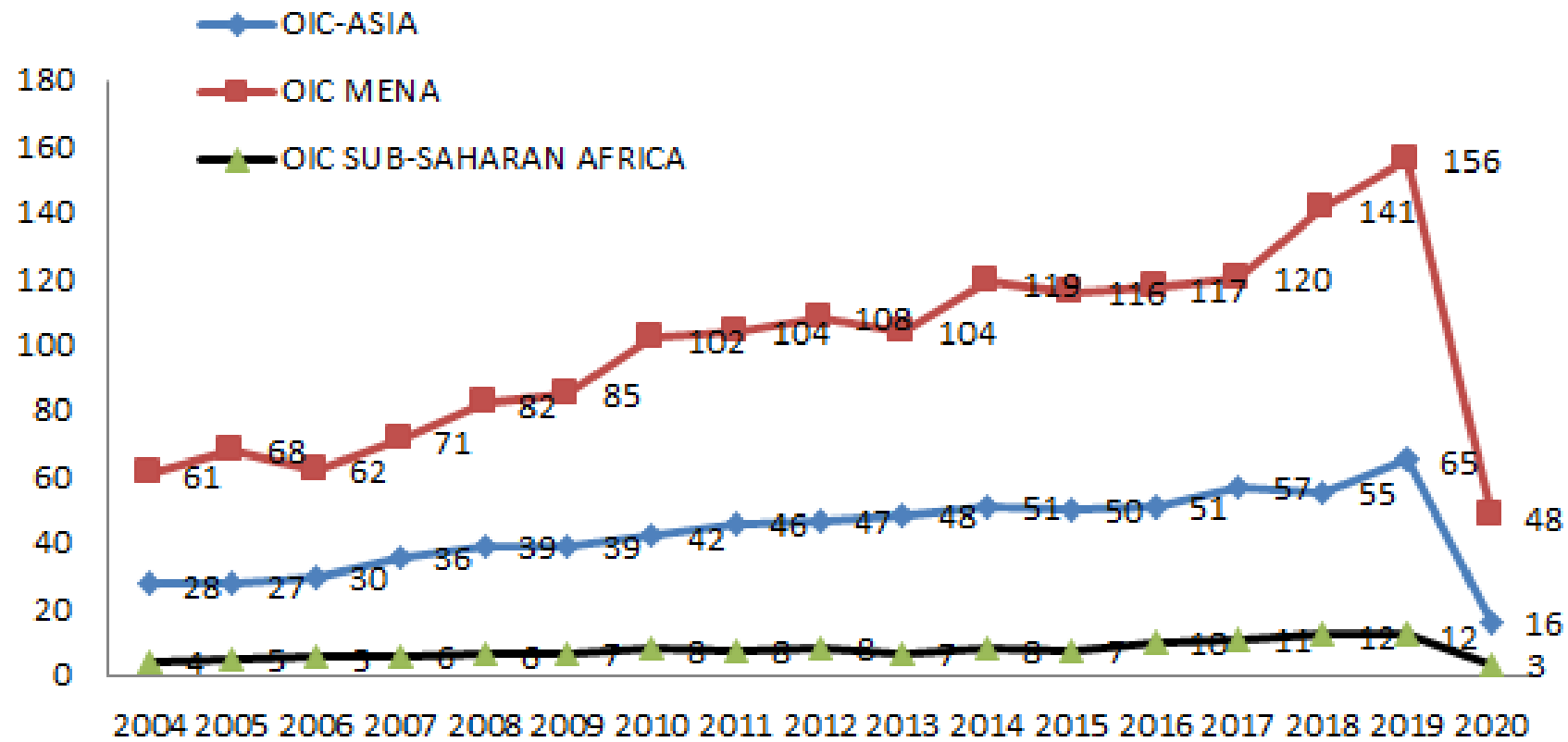


Arrivals	2000	2010	2015	2017	2018	2019	2020*	19/20*	(%)
World	674	949	1,186	1,329	1,401	1,459	410	-72%	100
Europe	386.4	488.7	607.6	673	710	744.2	234.4	-68.5%	50.7
Asia & Pacific	110.3	205.4	279.2	324	348	360.7	63.8	-82.3%	24.8
Americas	128.2	150.1	192.6	211	216	219	48.8	-67.7%	15.4
Africa	26.2	49.7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

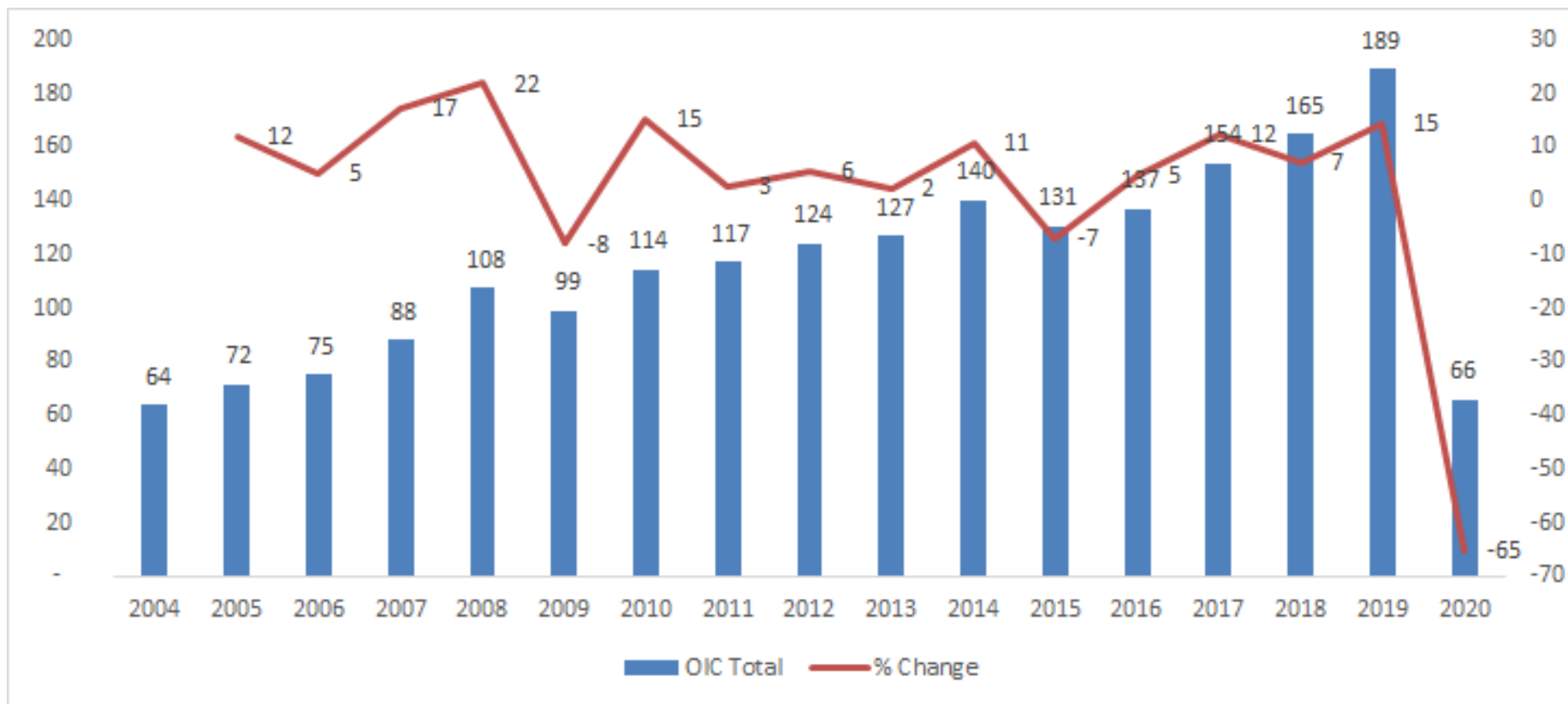
# IMPACTS OF COVID-19 ON OIC TOURISM



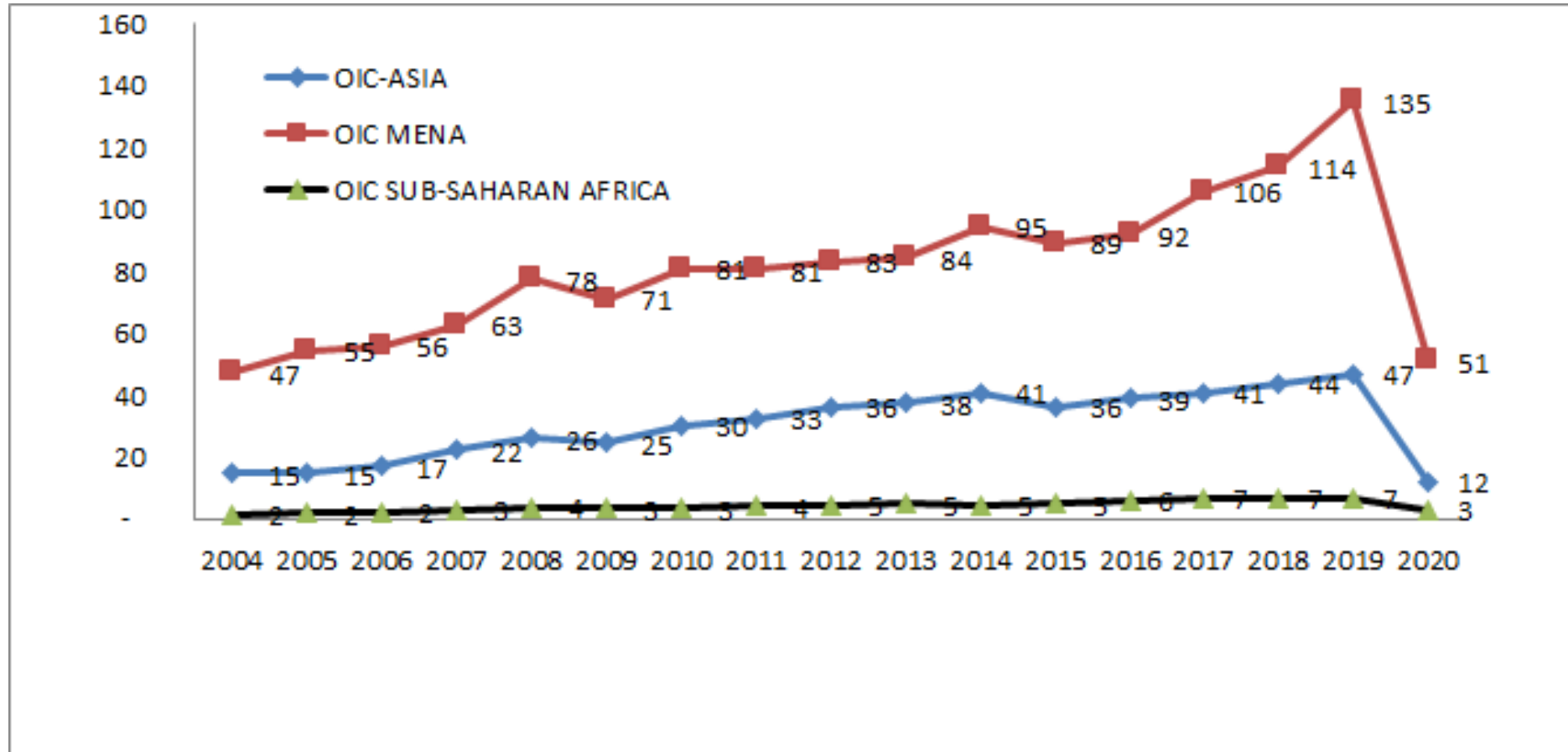
# REGIONAL OIC ARRIVALS



# OIC TOURISM RECEIPTS



# REGIONAL OIC TOURISM RECEIPTS





# MITIGATION STRATEGIES

## Collective and coordinated response

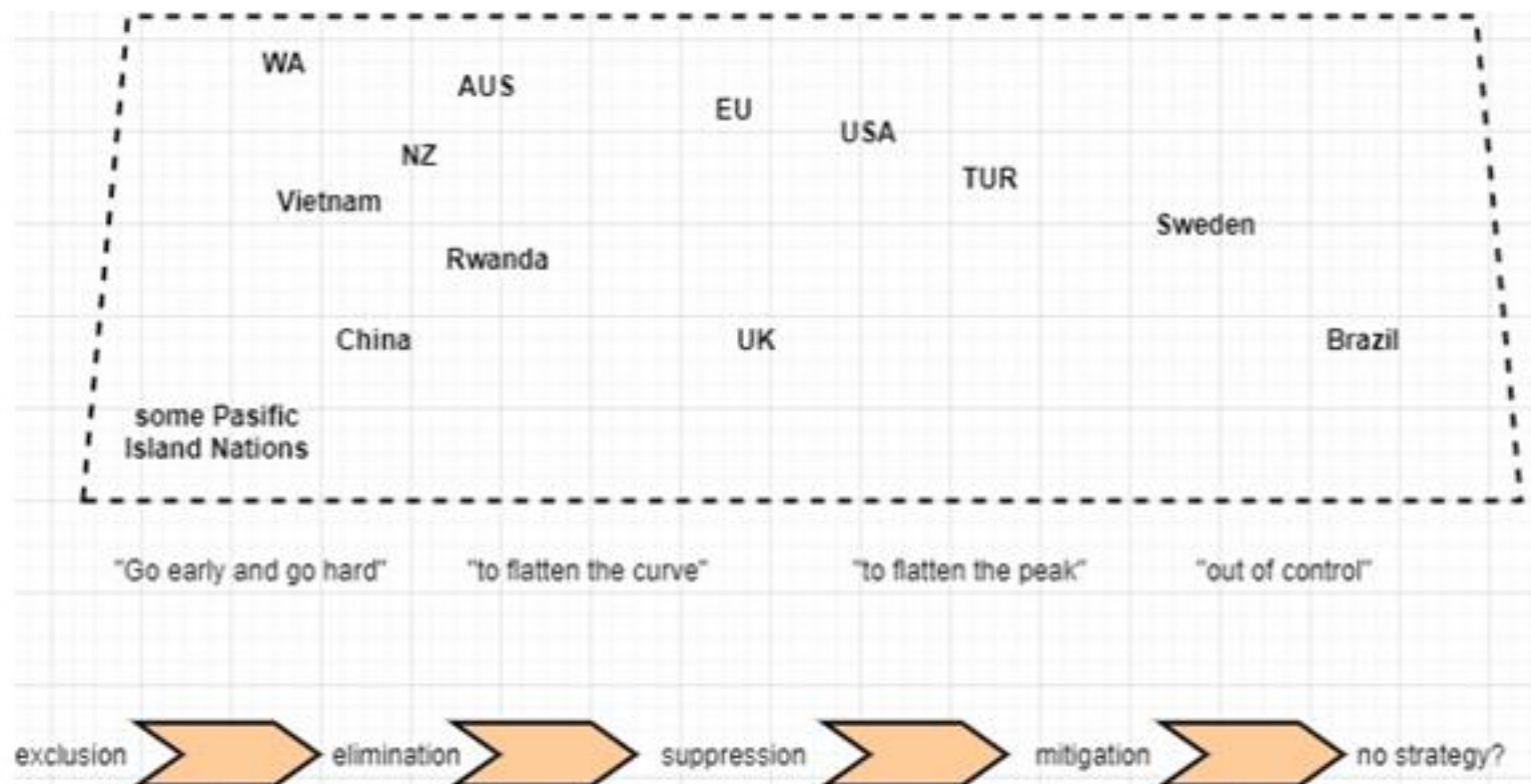
- Governments
- Private Sector

## Features of response

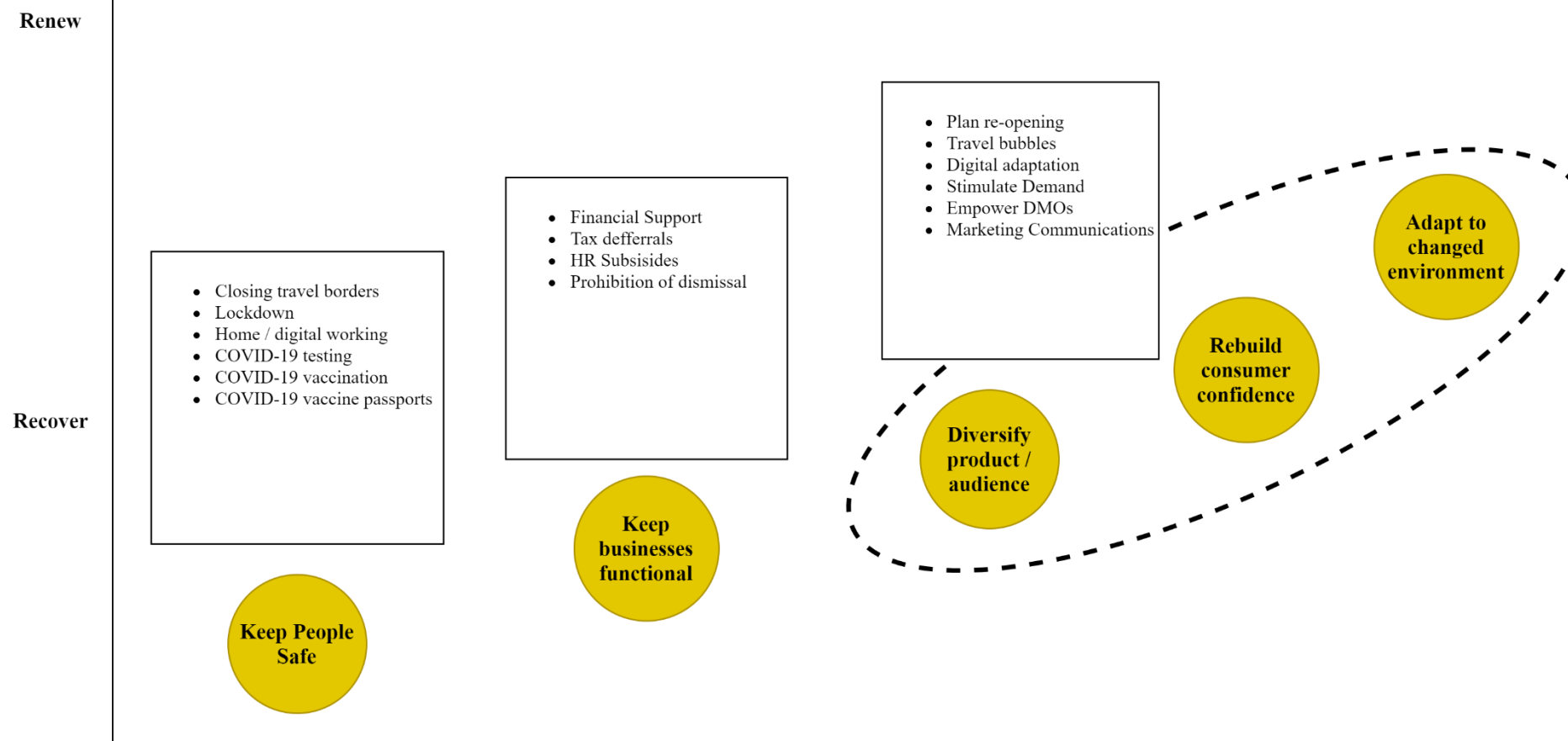
- Structure of Tourism (e.g. dependency, SMEs)
- Level of Pandemic
- Health Infra-structure
- Vaccination, immunity levels
- Economy



# GOVERNMENT MITIGATION STRATEGIES



# GOVERNMENT POLICY



# 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

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# METHODOLOGY

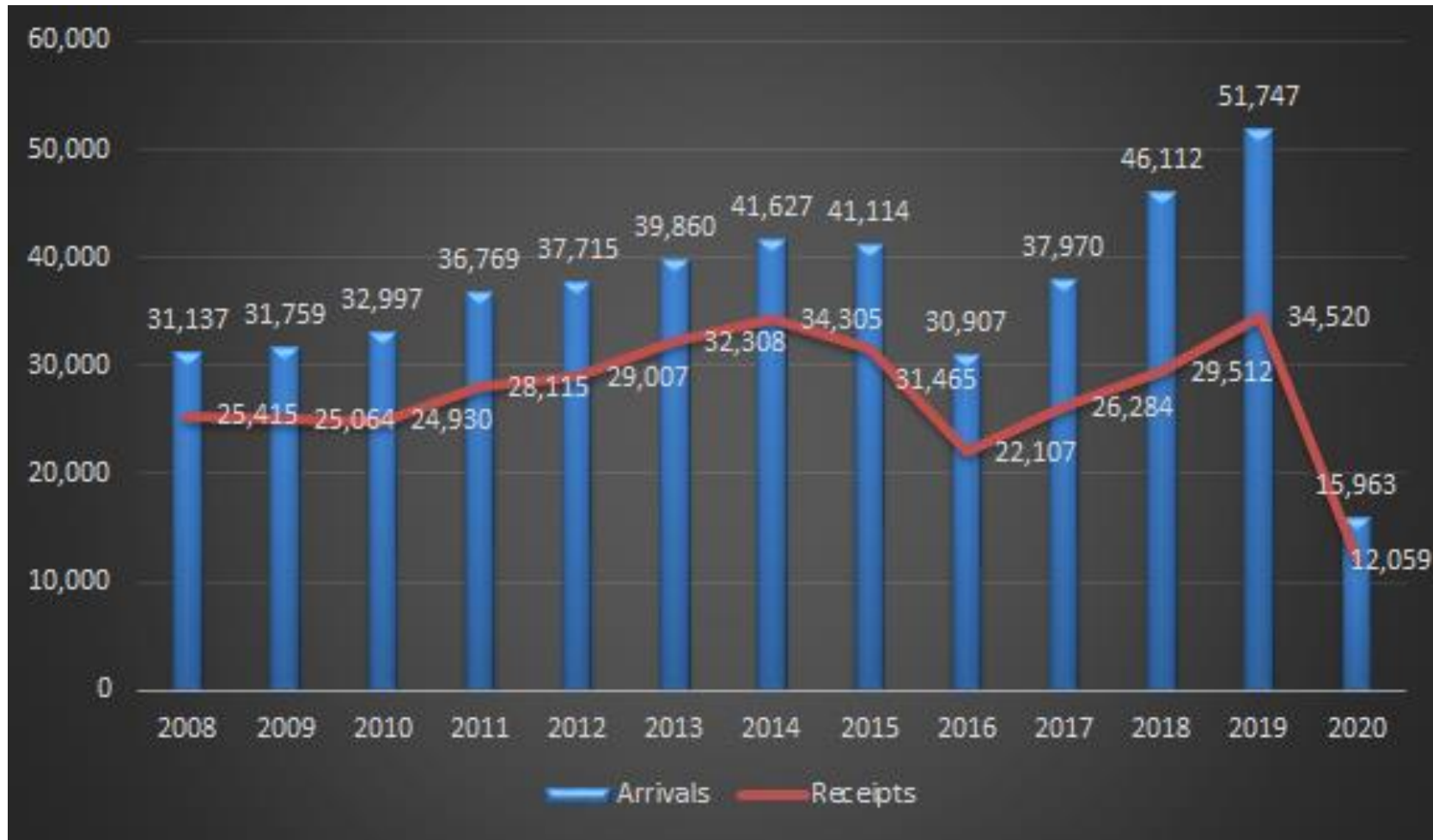
## Objectives

- 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

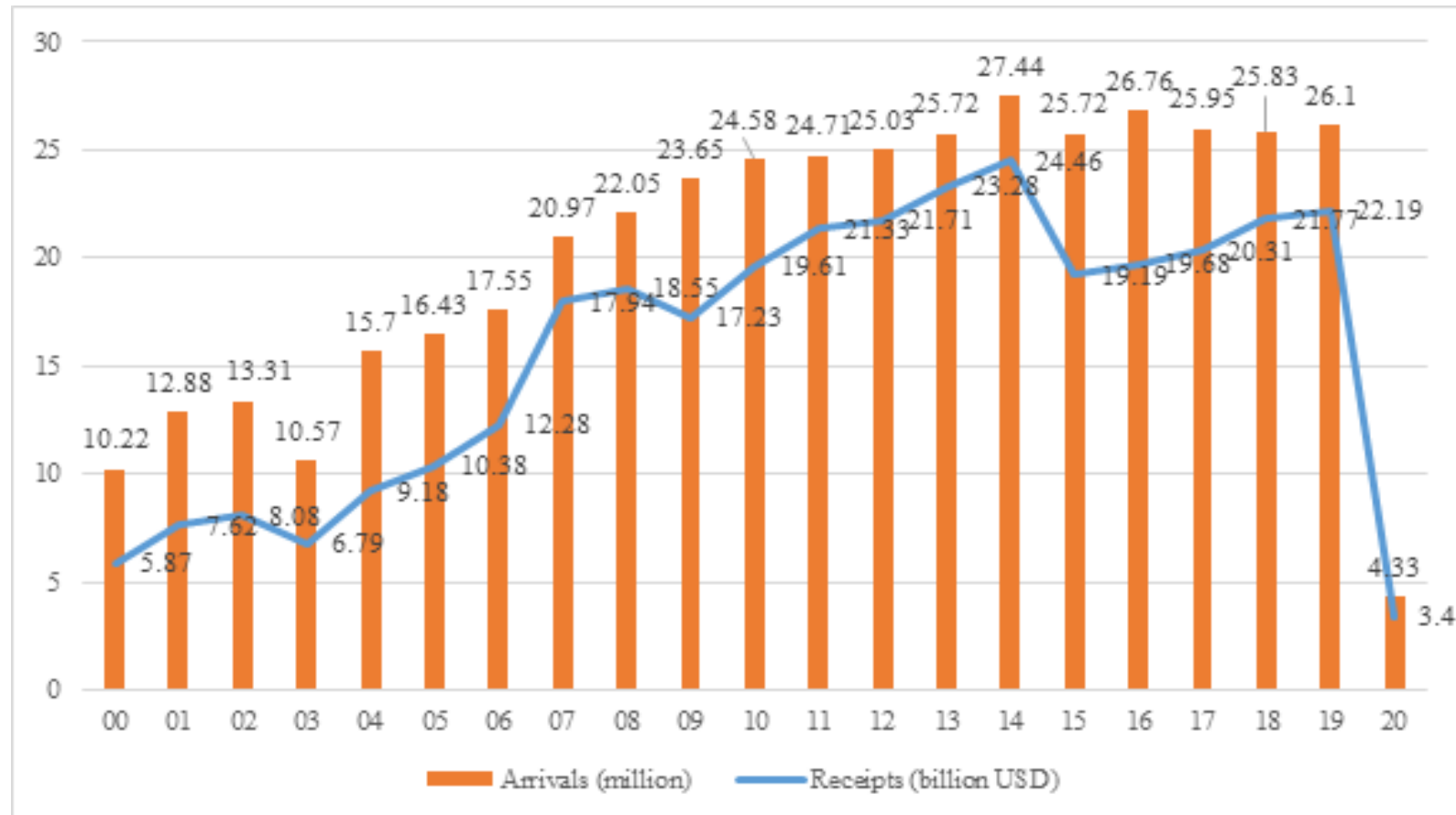
- Qualitative Analysis
  - Interviews with tourism experts
- Quantitative Analysis
  - Surveys with tourism stakeholders

# THE TURKISH CASE

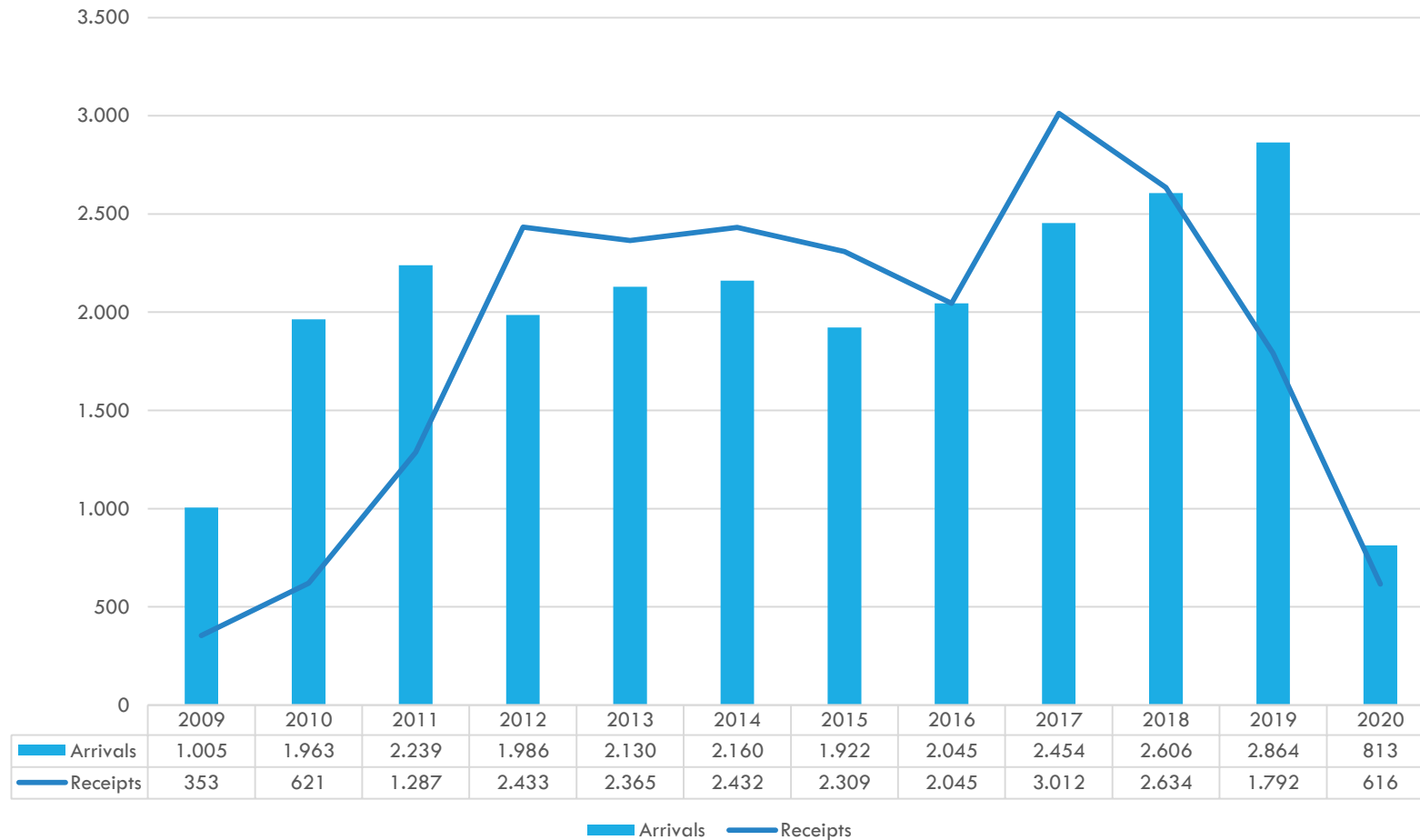




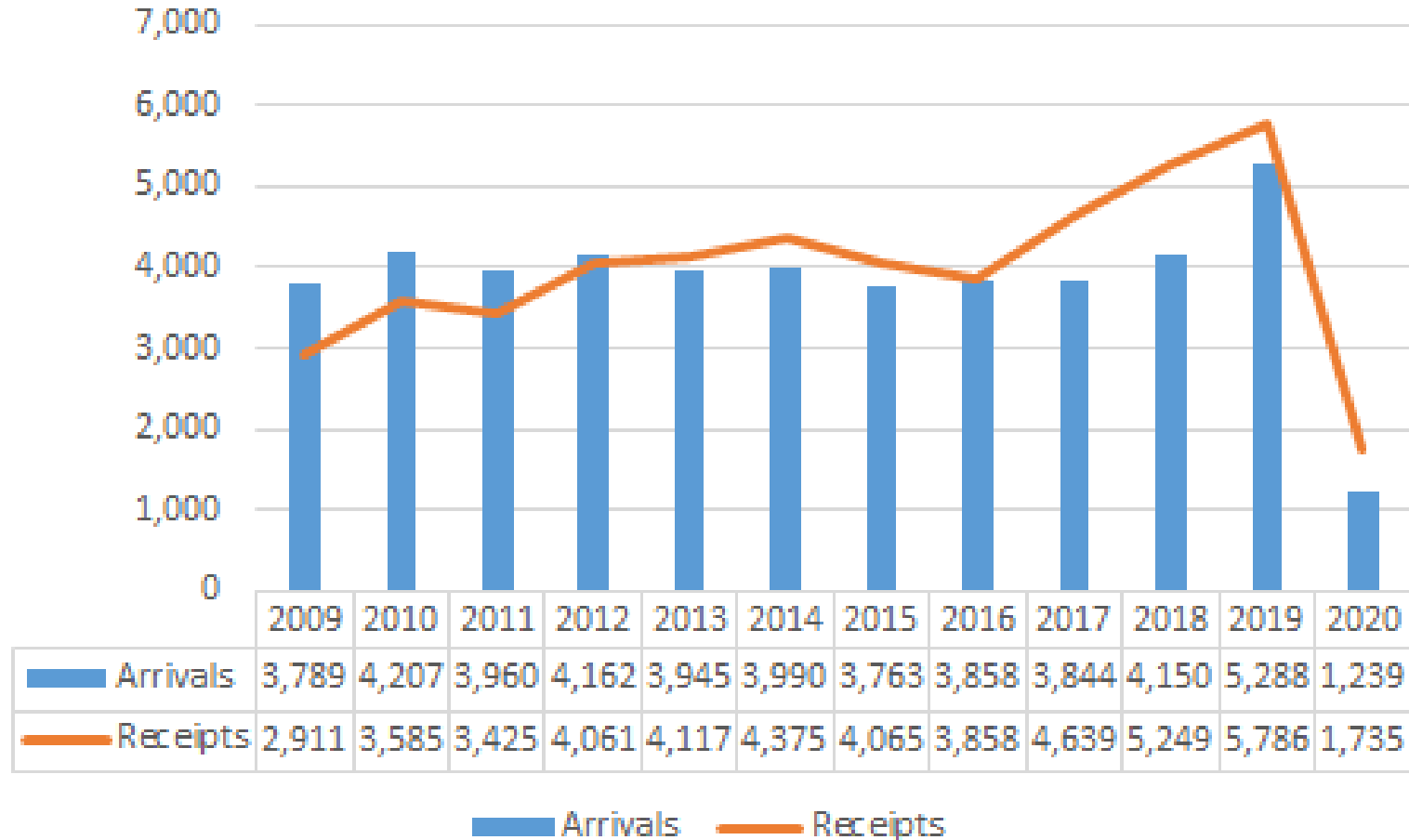
# THE MALAYSIAN CASE



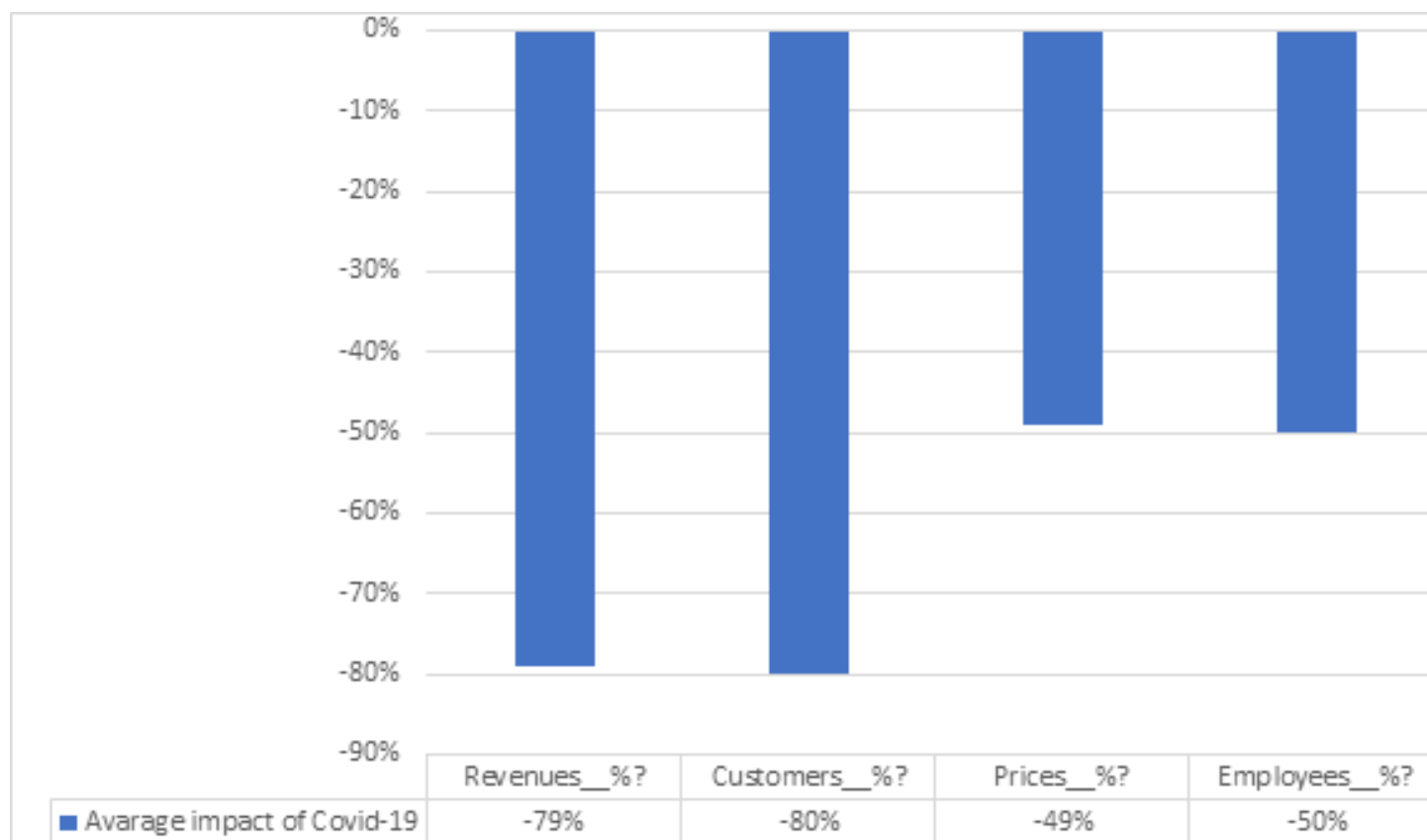
# THE AZERBAIJAN CASE



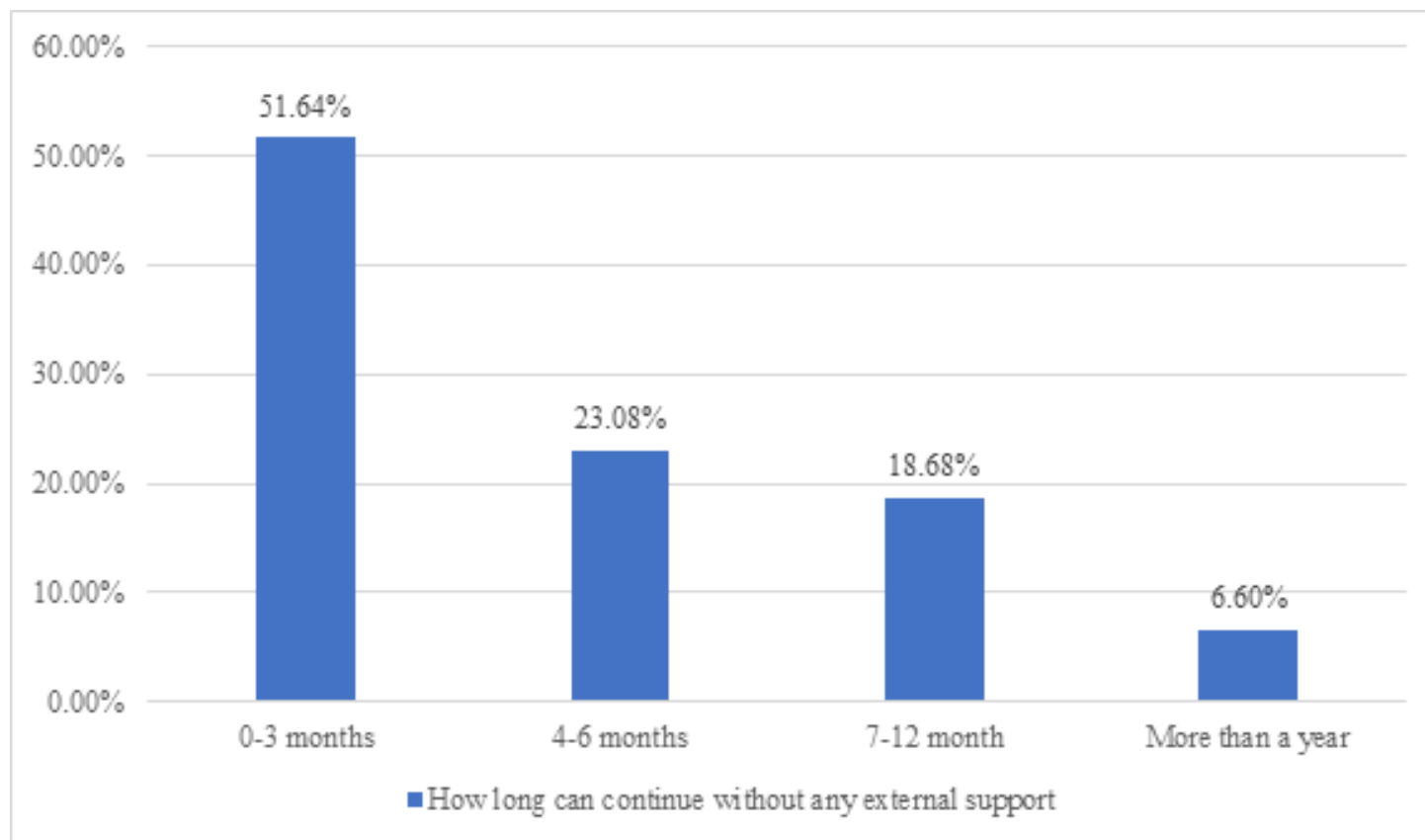
# THE JORDAN CASE



# REVENUE LOSS IN TOURISM INDUSTRY



# OPERATIONAL SURVIVAL



# CRISES RESILIENT TOURISM ORGANIZATIONS



Business size

Location

Affiliation

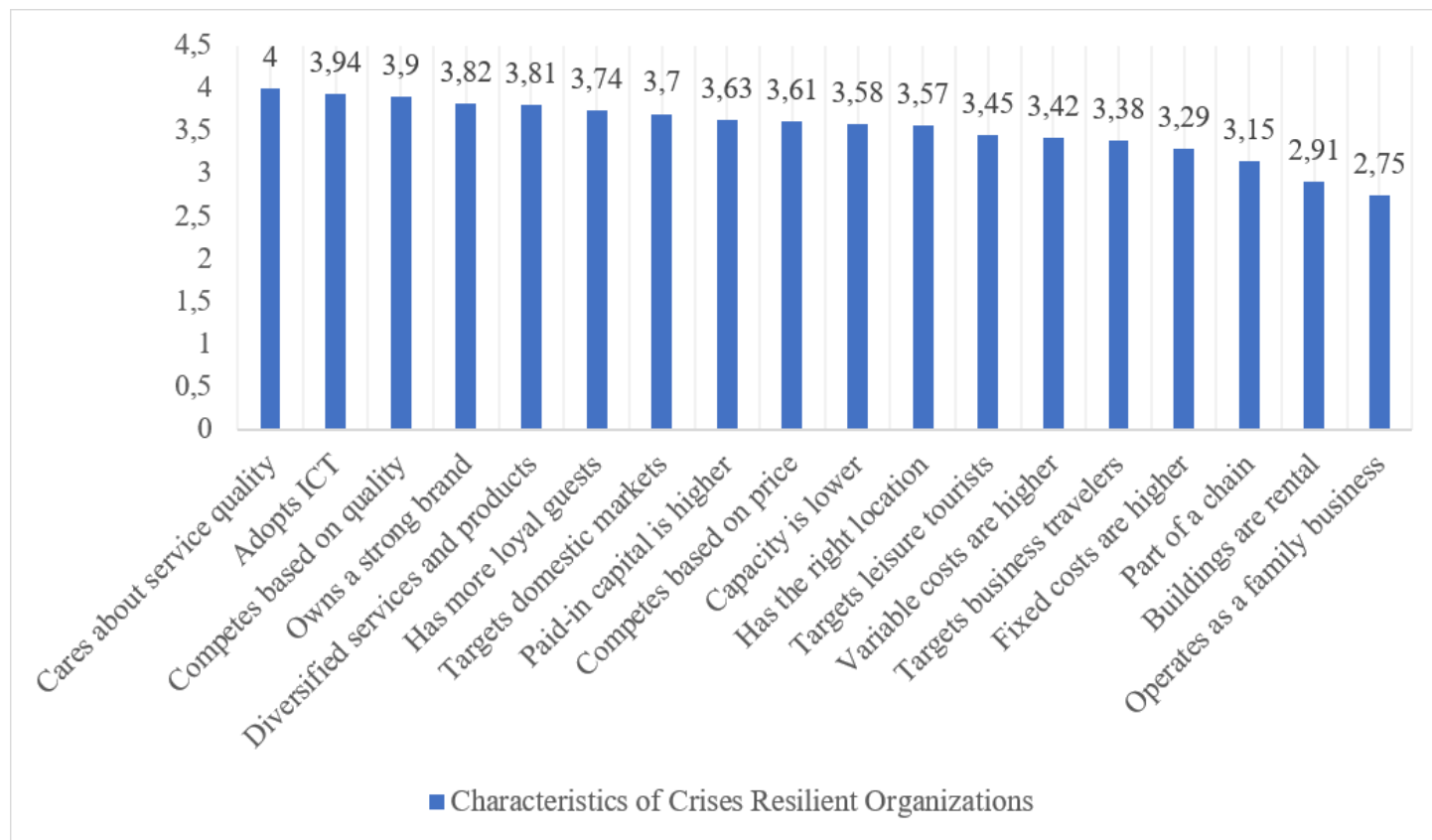
Market segments

Capital structure

Organizational culture and flexibility

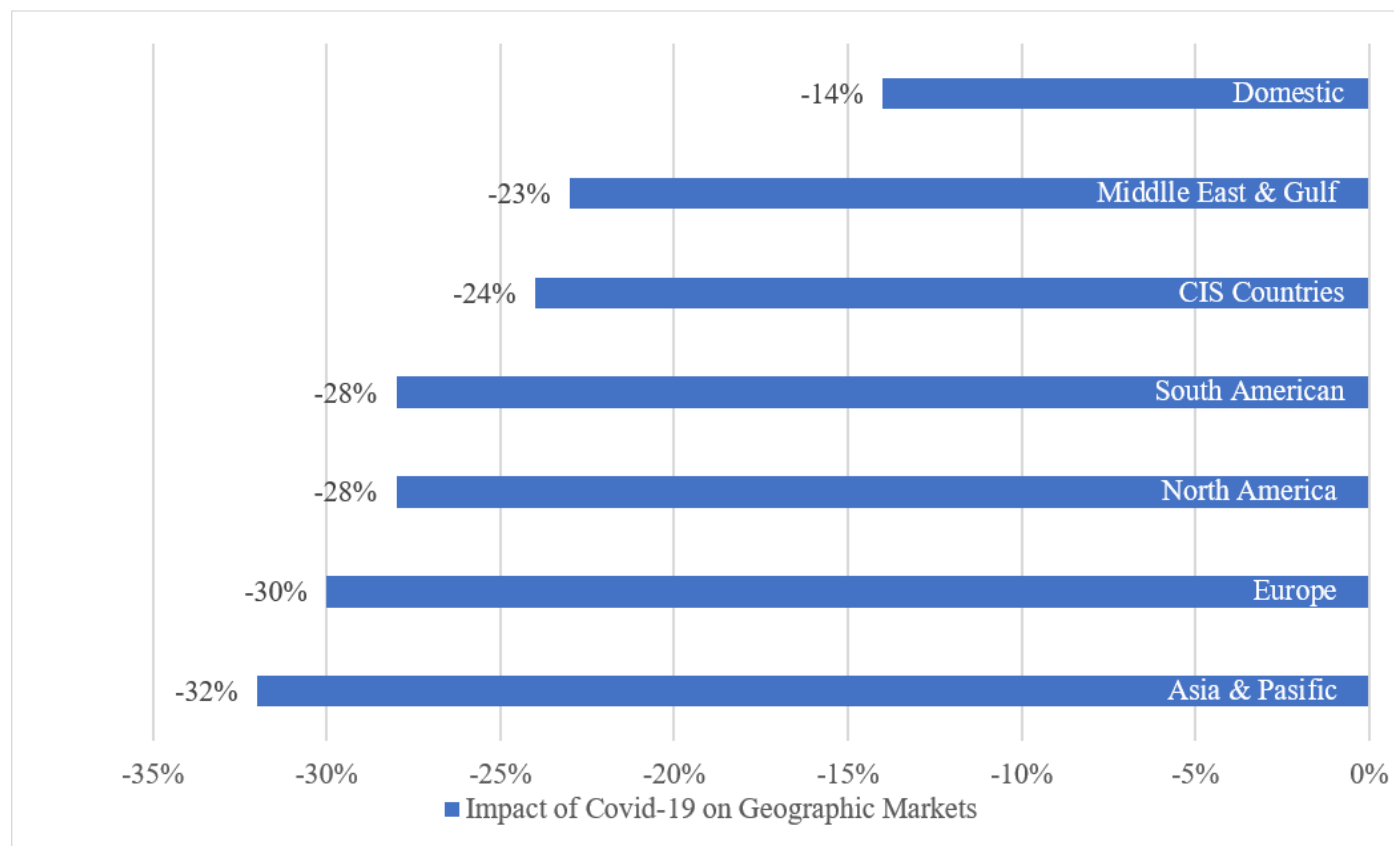
Ownership type of buildings

# CRISES RESILIENT ORGANIZATIONS

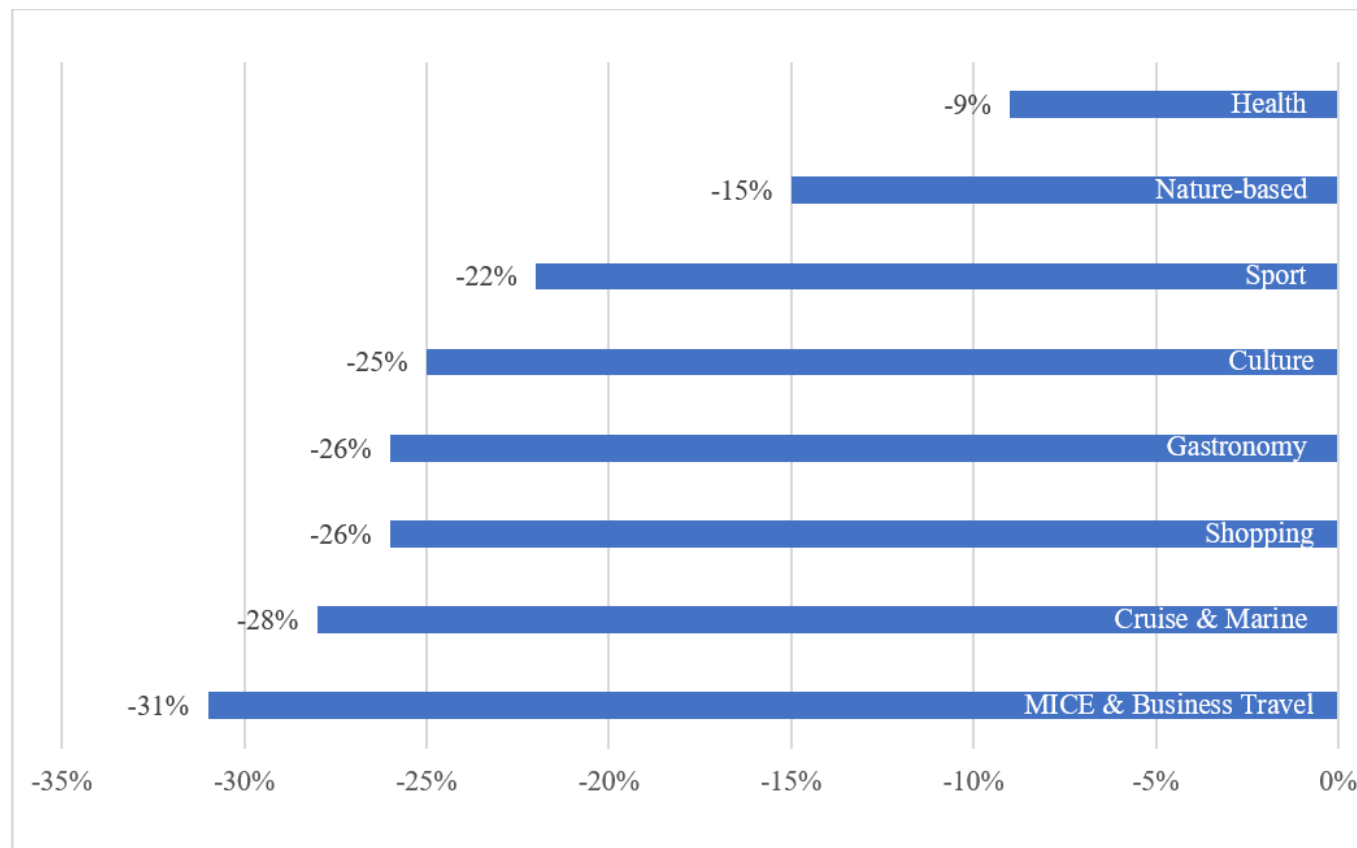




# TRANSFORMATION IN MARKETS



# TRANSFORMATION IN MOTIVATIONS



# INDUSTRY STRATEGIES



Restructuring debts

Reducing operating costs

Downsizing & Liquidation

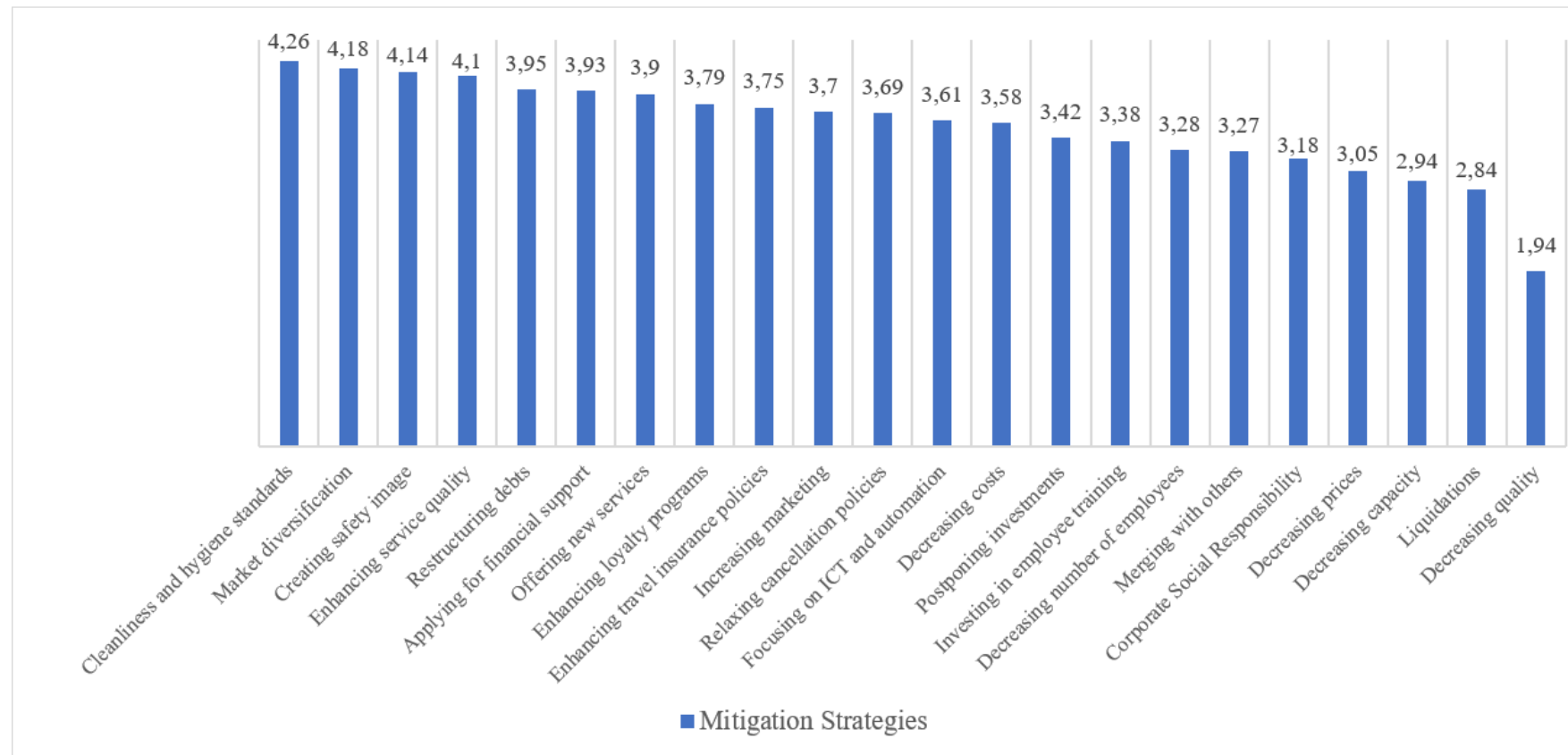
Hygiene and safety standards

Diversification

Enhancing quality

Relaxing cancellation policies

# TOURISM INDUSTRY MITIGATION STRATEGIES



# TRANSFORMATIONS IN THE INDUSTRY



Digital Transformations

Product Innovation

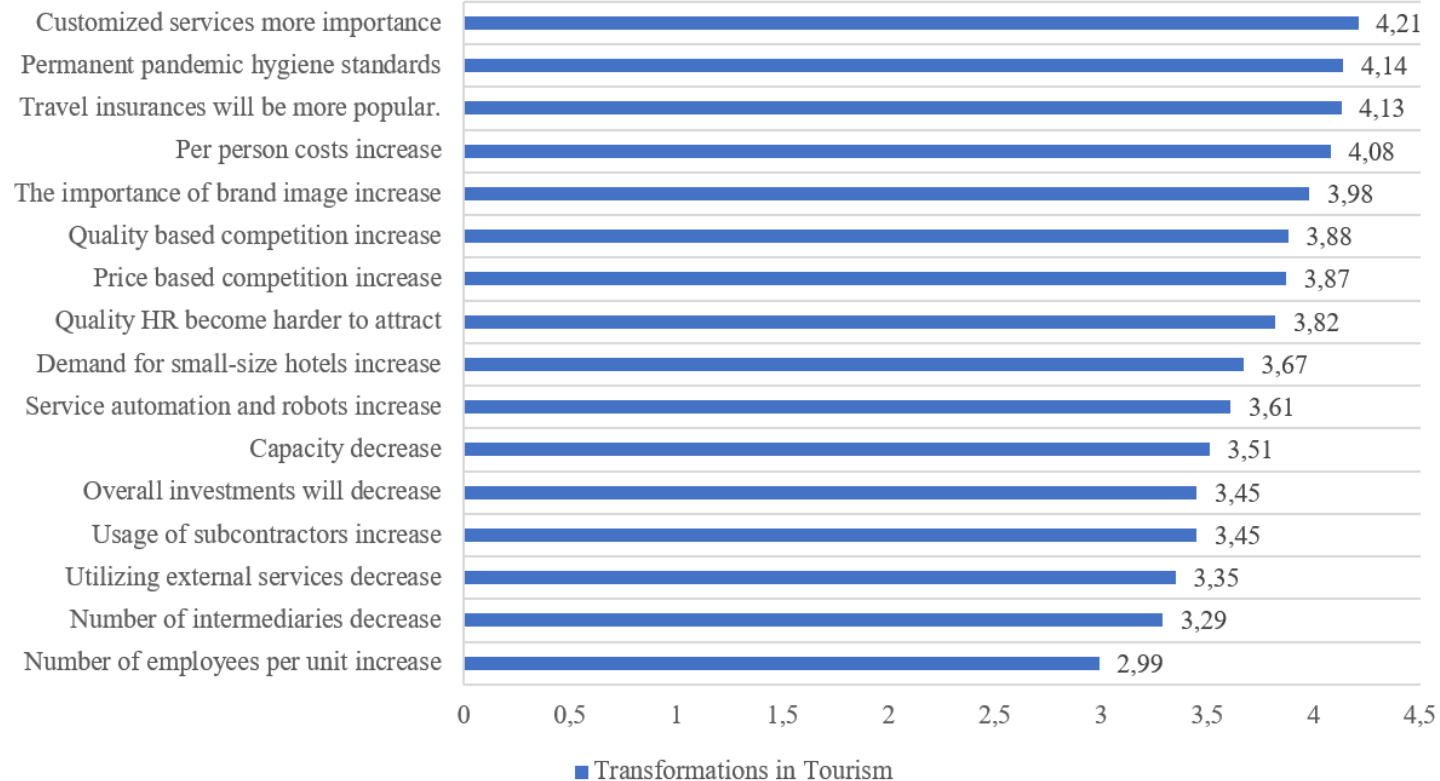
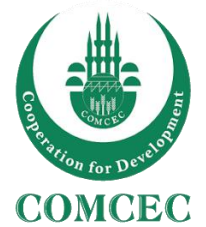
Market Transformations

Collaboration

Increased prices

Sustainability

# TRANSFORMATIONS IN THE INDUSTRY



# GOVERNMENT STRATEGIES



Short-term work allowance

Tax reduction and deferrals

Credit facilities

Postponing cancellation refunds

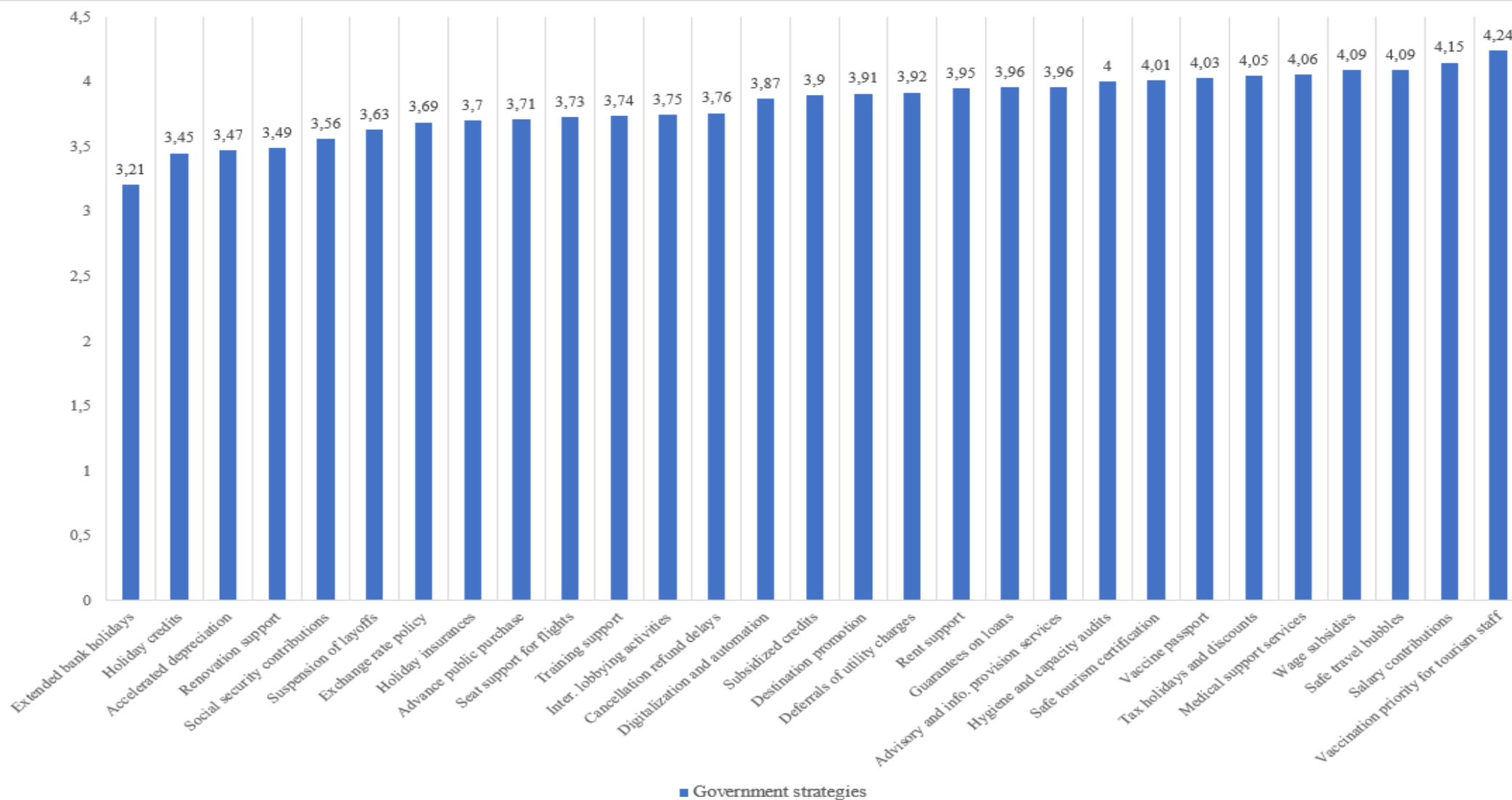
Safe tourism and vaccination priority

International PR and diplomacy

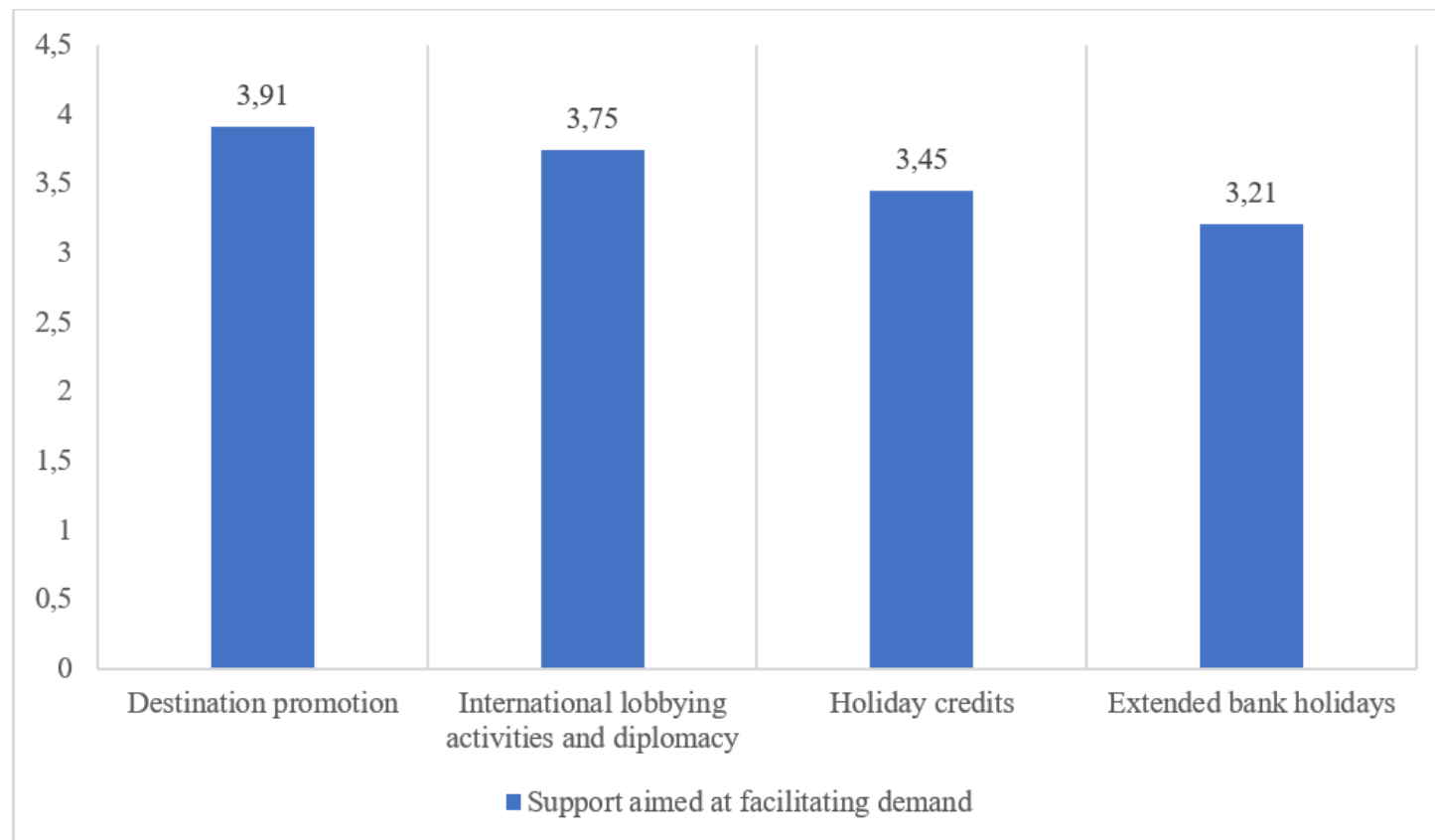
Selective subsidies



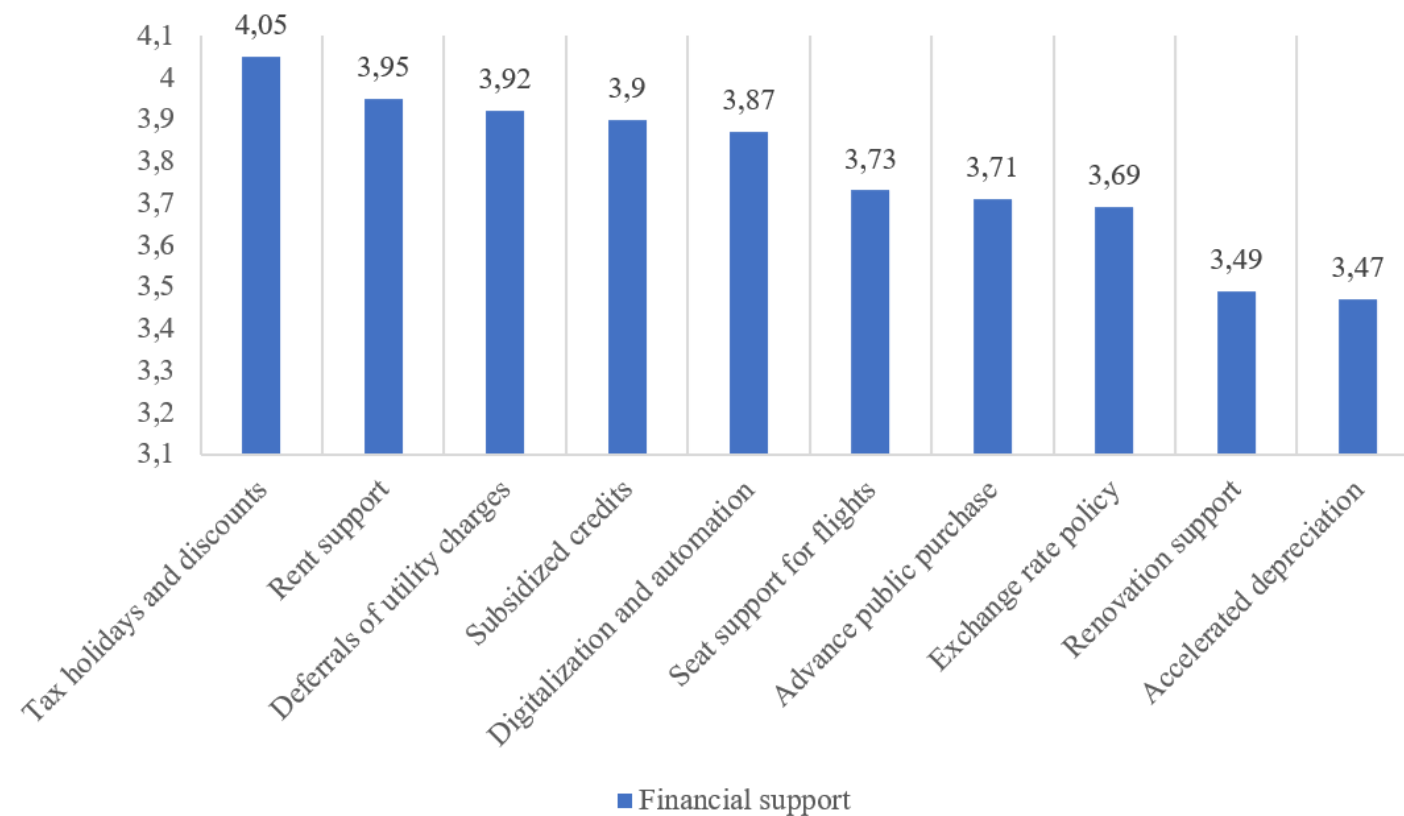
# GOVERNMENT STRATEGIES



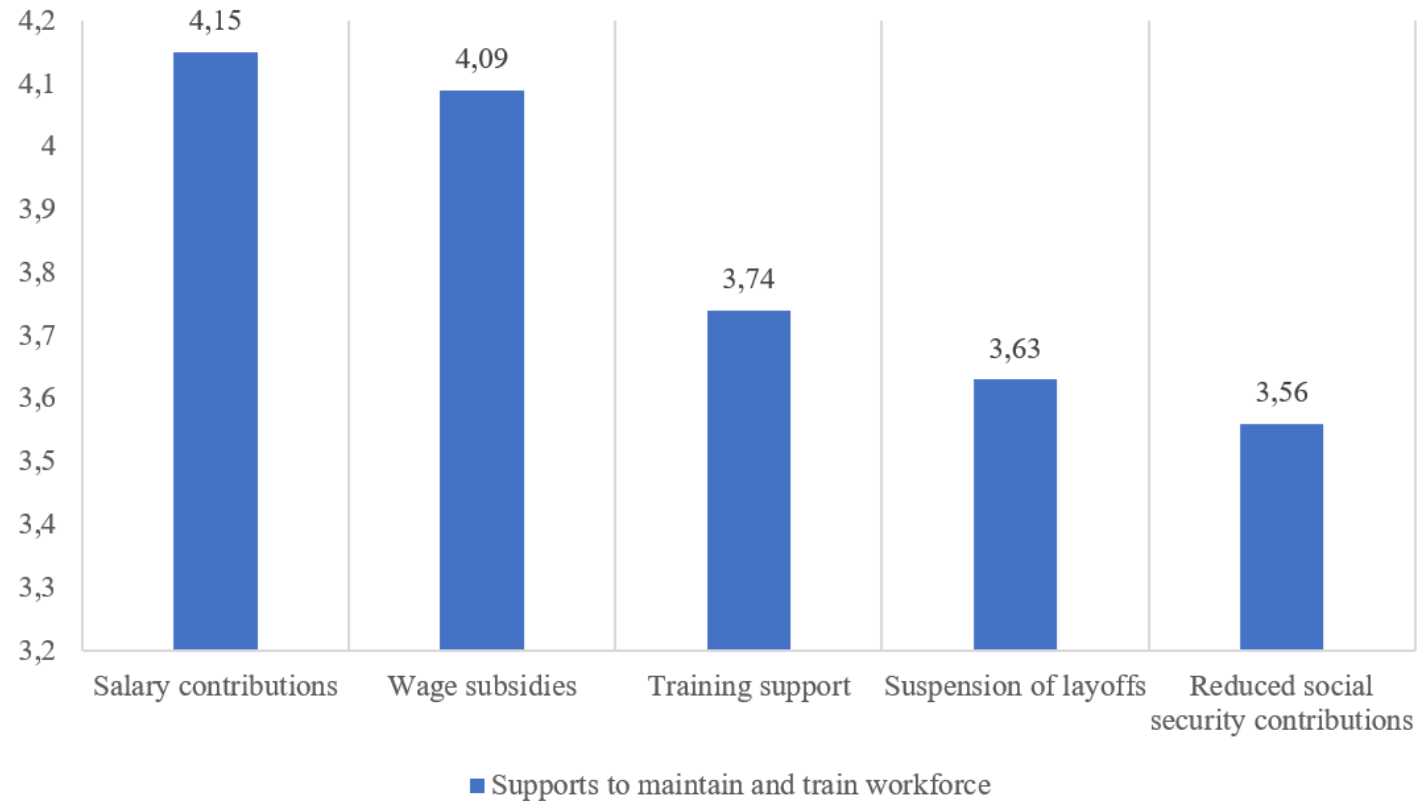
# STIMULATING DEMAND



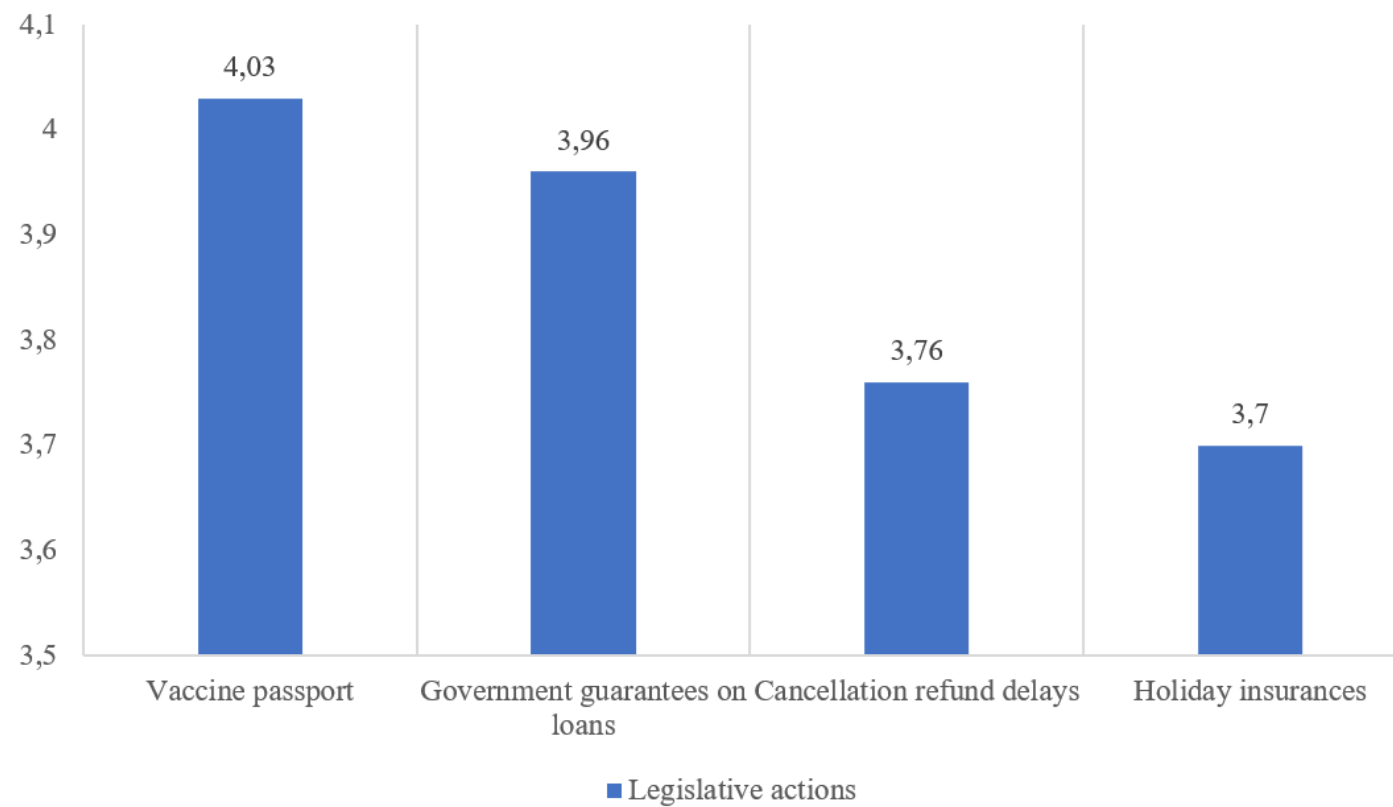
# FINANCIAL SUPPORT



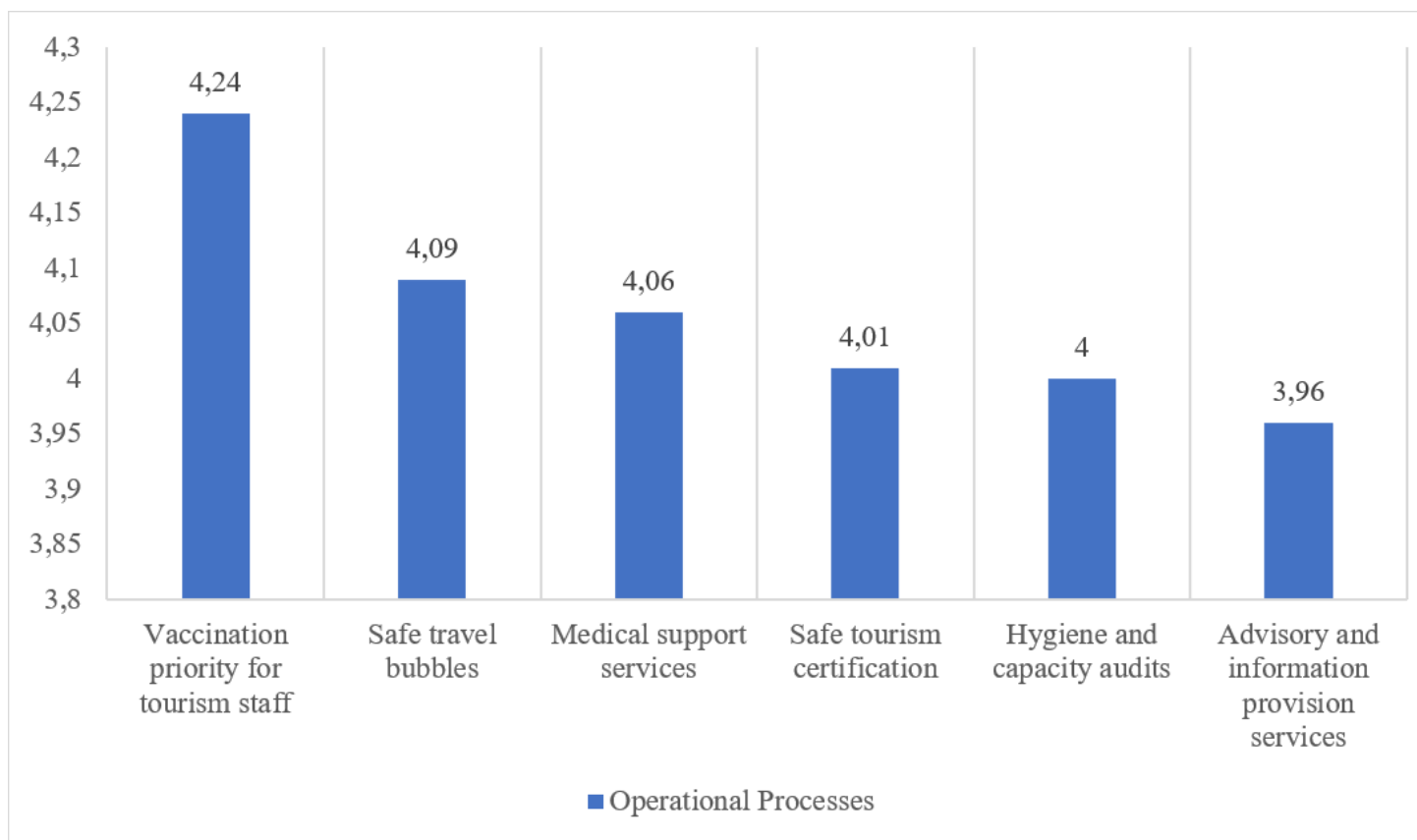
# WORKFORCE SUPPORT



# 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.	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

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



SCAN ME