



Editor
Kir Kuščer

Developing Tourism Policy during the COVID-19 Crisis

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Editor Kir Kuščer

DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS

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TABLE OF CONTENTS

1	INTRODUCTION TO DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS	1
	<i>Kir Kuščer</i>	
1.1	Purpose	2
1.2	Goals	2
1.3	Research questions	3
1.4	Methodology	3
1.5	Structure of the chapters in the monograph	4
2	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN SINGAPORE	6
	<i>Yifan Deng</i>	
	ABSTRACT	6
2.1	Introduction	6
2.2	Crisis management, tourism strategies and policies for coping with crises in Singapore	7
2.3	Situational analysis and trend analysis in Singapore	8
2.3.1	SWOT analysis for Singapore in light of the COVID-19 crisis	9
2.3.2	Importance-performance analysis for Singapore during the COVID-19 crisis	10
2.4	Empirical research	11
2.4.1	Results and implications	11
2.4.2	Limitations	15
2.5	Conclusion	15
3	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN UZBEKISTAN	17
	<i>Gulsanam Rozikova</i>	
	ABSTRACT	17
3.1	Introduction	17
3.2	Crisis management, tourism strategies and policies for coping with crises in Uzbekistan	18
3.3	Situational analysis and trend analysis in Uzbekistan	19
3.3.1	SWOT analysis for Uzbekistan in light of the COVID-19 crisis	20
3.3.2	Importance-performance analysis for Uzbekistan during the COVID-19 crisis	21
3.4	Empirical research	22
3.4.1	Results and implications	23
3.4.2	Limitations	28
3.5	Conclusion	28
4	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN SWITZERLAND	30
	<i>Judith Hueber</i>	
	ABSTRACT	30
4.1	Introduction	30
4.2	Crisis management, tourism strategies and policies for coping with crises in Switzerland	31

4.3	Situational analysis and trend analysis in Switzerland	32
4.3.1	SWOT analysis for Switzerland in light of the COVID-19 crisis	32
4.3.2	Importance-performance analysis for Switzerland during the COVID-19 crisis	33
4.4	Empirical research	34
4.4.1	Results and implications	34
4.4.2	Limitations	37
4.5	Conclusion	38
5	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN MACAO, CHINA	39
	<i>Yaozhi Zhang</i>	
	ABSTRACT	39
5.1	Introduction	39
5.2	Crisis management, tourism strategies, and policies for coping with crises in Macao	40
5.3	Situational analysis and trend analysis in Macao	41
5.3.1	SWOT analysis for Macao in light of the COVID-19 crisis	42
5.3.2	Importance-performance analysis for Macao during the COVID-19 crisis	42
5.4	Empirical research	43
5.4.1	Results and implications	44
5.4.2	Limitations	47
5.5	Conclusion	47
6	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN ABU DHABI, UNITED ARAB EMIRATES	48
	<i>Chaekyung Park</i>	
	ABSTRACT	48
6.1	Introduction	48
6.2	Crisis management, tourism strategies and policies for coping with crises in Abu Dhabi	49
6.3	Situational analysis and trend analysis in Abu Dhabi	51
6.3.1	SWOT analysis for Abu Dhabi in light of the COVID-19 crisis	52
6.3.2	Importance-performance analysis for Abu Dhabi during the COVID-19 crisis	54
6.4	Empirical research	55
6.4.1	Results and implications	55
6.4.2	Limitations	59
6.5	Conclusion	60
7	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LA PAZ, BOLIVIA	61
	<i>Dayana Rojas Mango</i>	
	ABSTRACT	61
7.1	Introduction	61
7.2	Crisis management, tourism strategies and policies for coping with crises in La Paz	62
7.3	Situational analysis and trend analysis for La Paz	62
7.3.1	SWOT analysis for La Paz in light of the COVID-19 crisis	64
7.3.2	Importance-performance analysis for La Paz during the COVID-19 crisis	65

7.4	Empirical research	66
7.4.1	Results and implications	66
7.4.2	Limitations	69
7.5	Conclusion	70
8	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LILLEHAMMER, NORWAY	71
	<i>Ximena Alejandra Rojas Sierra</i>	
	ABSTRACT	71
8.1	Introduction	71
8.2	Crisis management, tourism strategies and policies for coping with crises in Lillehammer	72
8.3	Situational analysis and trend analysis for Lillehammer	72
8.3.1	SWOT analysis for Lillehammer in light of the COVID-19 crisis	73
8.3.2	Importance-performance analysis for Lillehammer during the COVID-19 crisis	74
8.4	Empirical research	75
8.4.1	Results and implications	75
8.4.2	Limitations	78
8.5	Conclusion	79
9	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN FUNEN, DENMARK	80
	<i>Maria Gympaki</i>	
	ABSTRACT	80
9.1	Introduction	80
9.2	Crisis management, tourism strategies and policies for coping with crises in Funen	81
9.3	Situational analysis and trend analysis for Funen	82
9.3.1	SWOT analysis for Funen in light of the COVID-19 crisis	82
9.3.2	Importance-performance analysis for Funen during the COVID-19 crisis	83
9.4	Empirical research	85
9.4.1	Results and implications	85
9.4.2	Limitations	89
9.5	Conclusion	89
10	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LOIRE-ATLANTIQUE, FRANCE	91
	<i>Olivia Bourkel</i>	
	ABSTRACT	91
10.1	Introduction	91
10.2	Crisis management, tourism strategies and policies for coping with crises in Loire-Atlantique	92
10.3	Situational analysis and trend analysis for Loire-Atlantique	93
10.3.1	SWOT analysis for the Loire-Atlantique in light of the COVID-19 crisis	94
10.3.2	Importance-performance analysis for the Loire-Atlantique during the COVID-19 crisis	95
10.4	Empirical research	96
10.4.1	Results and implications	97

10.4.2	Limitations	101
10.5	Conclusion	101
11	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN CRETE, GREECE	103
	<i>Christina Katsantoni</i>	
	ABSTRACT	103
11.1	Introduction	103
11.2	Crisis management, tourism strategies and policies for coping with crises on Crete	104
11.3	Situational analysis and trend analysis for Crete	105
11.3.1	SWOT analysis for Crete in light of the COVID-19 crisis	106
11.3.2	Importance-performance analysis for Crete during the COVID-19 crisis	107
11.4	Empirical research	108
11.4.1	Results and implications	108
11.4.2	Limitations	111
11.5	Conclusion	112
12	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN GORIŠKA BRDA, SLOVENIA	114
	<i>Sara Mavrič</i>	
	ABSTRACT	114
12.1	Introduction	114
12.2	Crisis management, tourism strategies and policies for coping with crises in Goriška Brda	115
12.3	Situational analysis and trend analysis for Goriška Brda	116
12.3.1	SWOT analysis for Goriška Brda in light of the COVID-19 crisis	117
12.3.2	Importance-performance analysis for Goriška Brda during the COVID-19 crisis	118
12.4	Empirical research	119
12.4.1	Results and implications	119
12.4.2	Limitations	123
12.5	Conclusion	124
13	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN PIRAN AND PORTOROSE, SLOVENIA	126
	<i>Karina Amirgamzaeva</i>	
	ABSTRACT	126
13.1	Introduction	126
13.2	Crisis management, tourism strategies and policies for coping with crises in Piran and Portorose	127
13.3	Situational analysis and trend analysis for Piran and Portorose	128
13.3.1	SWOT analysis for Piran and Portorose in light of the COVID-19 crisis	129
13.3.2	Importance-performance analysis for Piran & Portorose during the COVID-19 crisis	130
13.4	Empirical research	131
13.4.1	Results and implications	131
13.4.2	Limitations	134
13.5	Conclusion	134

14	DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS ON HVAR, CROATIA	135
	<i>Barbara Bachiocco</i>	
	ABSTRACT	135
	14.1 Introduction	135
	14.2 Crisis management, tourism strategies and policies for coping with crises on Hvar	136
	14.3 Situational analysis and trend analysis for Hvar	137
	14.3.1 SWOT analysis for Hvar in light of the COVID-19 crisis	138
	14.3.2 Importance-performance analysis for Hvar during the COVID-19 crisis	138
	14.4 Empirical research	139
	14.4.1 Results and implications	139
	14.4.2 Limitations	143
	14.5 Conclusion	144
15	CONCLUSION	145
	<i>Kir Kuščer</i>	
	REFERENCES	150

LIST OF TABLES

Table 1: Basic indicators for Singapore	9
Table 2: Policies suggested for Singapore	13
Table 3: Basic indicators for Uzbekistan	20
Table 4: Policies suggested for Uzbekistan	26
Table 5: Basic indicators for Switzerland	32
Table 6: Policies suggested for Switzerland	36
Table 7: Basic indicators for Macao	41
Table 8: Policies suggested for Macao	46
Table 9: Basic indicators for Abu Dhabi	51
Table 10: Policies suggested for Abu Dhabi	57
Table 11: Basic indicators for La Paz	63
Table 12: Policies suggested for La Paz	67
Table 13: Basic indicators for Lillehammer, Norway	73
Table 14: Policies suggested for Lillehammer	77
Table 15: Basic indicators for Funen	82
Table 16: Policies suggested for Funen	88
Table 17: Basic indicators for Loire-Atlantique	94
Table 18: Policies suggested for Loire-Atlantique	99
Table 19: Basic indicators for Crete	105
Table 20: Policies suggested for Crete	110
Table 21: Basic indicators for Goriška Brda	116
Table 22: Policies suggested for Goriška Brda	122
Table 23: Basic indicators for Piran and Portorose	128
Table 24: Policies suggested for Piran and Portorose	133
Table 25: Basic indicators for Hvar	137
Table 26: Policies suggested for Hvar	143

TABLE OF FIGURES

Figure 1: SWOT analysis for Singapore	9
Figure 2: Importance-performance analysis for Singapore	10
Figure 3: SWOT analysis for Uzbekistan	21
Figure 4: Importance-performance analysis for Uzbekistan	22
Figure 5: SWOT analysis for Switzerland	33
Figure 6: Importance-performance analysis for Switzerland	34
Figure 7: SWOT analysis for Macao	42
Figure 8: Importance-performance analysis for Macao	43
Figure 9: SWOT analysis for Abu Dhabi	53
Figure 10: Importance-performance analysis for Abu Dhabi	54
Figure 11: SWOT analysis for La Paz	64
Figure 12: Importance-performance analysis for La Paz	65
Figure 13: SWOT analysis for Lillehammer	73
Figure 14: Importance-performance analysis for Lillehammer	74
Figure 15: SWOT analysis for Funen	83
Figure 16: Importance-performance analysis for Funen	84
Figure 17: SWOT analysis for Loire-Atlantique	95
Figure 18: Importance-performance analysis for Loire-Atlantique	96
Figure 19: SWOT analysis for Crete	106
Figure 20: Importance-performance analysis for Crete	107
Figure 21: SWOT analysis for Goriška Brda	117
Figure 22: Importance-performance analysis for Goriška Brda	118
Figure 23: SWOT analysis for Piran and Portorose	129
Figure 24: Importance-performance analysis for Piran and Portorose	130
Figure 25: SWOT analysis for Hvar	138
Figure 26: Importance-performance analysis for Hvar	139

1 INTRODUCTION TO DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS

Kir Kuščer

The world is becoming ever more interconnected and interdependent, making tourism highly susceptible to external factors (Jessop, 1999; Ritchie, 2004). Tourism crises are frequently addressed in the literature, although health crises are rarely considered. One can find examples like SARS, Ebola, foot and mouth disease, influenza A (H1N1) and influenza pandemic (Miller & Ritchie, 2003; Ritchie et al., 2004; Page et al., 2006; Smith, 2006; Henderson, 2007a; Lyon & Worton, 2007; Monterrubio, 2010; Busch et al., 2015; Novelli et al., 2018). Still, we must accept that crises are a fact of life and have a wide effect on all stakeholders (Santana, 2004). The COVID-19 crisis is set to become the biggest influence on tourism among all crises; up to five times the impact of the 2008 global financial crisis with a drop of 30% forecast in travel & tourism GDP and employment by the World Travel & Tourism Council (WTTC, 2020a). Tourism is also one of the industries hardest hit by the crisis, with short-term effects already being visible and the medium- and long-term ones yet to emerge. The United Nations World Tourism Organisation's (UNWTO's) three scenarios (published March 2020) forecast a 58%–78% drop in tourist arrivals from April to December 2020 with 100–120 million direct tourism jobs being at risk (UNWTO, 2020a). The COVID-19 crisis does have some similarities with economic and terrorist ones, such as people travelling less and staying closer to home, spending less, booking late, travelling out of season, and being afraid to travel (Gallup Organisation, 2009; UNWTO, 2009; Papatheodorou, Rosselló & Xiao, 2010; Korstanje, 2011; Blanke & Chiesa, 2013).

This monograph proposes various measures and policies for different countries/destinations in their attempts to combat the COVID-19 crisis' effects. Previous crises show that destination management organisations (DMOs) must react quickly to the occurrence of a crisis and start a recovery plan (Beirman, 2003). The quickly shifting situation during a crisis requires that tourism policies be adaptable (Monterrubio, 2010); the determining of policies must include best-practice cases (Goniewicz et al., 2020). According to Blake and Sinclair (2003), in any crisis of sufficient magnitude, policymakers need to decide whether they want to optimise costs or adapt to the new situation. Stakeholders' possible responses and the cost-effectiveness of measures must be assessed. To ease the impacts of the COVID-19 crisis, the further digitalisation of businesses, organisations and the public sector is called for. Focusing on digital marketing aimed at the domestic and regional markets ('staycations') may prove to be an efficient and flexible measure to ensure a quick recovery (Papatheodorou, Rosselló & Xiao, 2010). A key factor in addressing the COVID-19 crisis is recognition of the importance of the stakeholders and their collaboration at a destination, and considering their interests while also managing the crisis (Matsny, 2001; Laws & Prideaux, 2005).

The interviews for this book were conducted in early April 2020 in the middle of the lockdowns imposed across Europe. More proactive countries and destinations had already started on the implementation of COVID-19 tourism policies, whereas other countries and destinations were mostly still discussing them. The unpredictability of the COVID-19 crisis meant that destinations could not really prepare, apart from their general crisis preparedness (Okumus, Altinay & Arasli,

2005). Most destinations are currently in the phase of trying to limit the harm caused by the crisis; some might already be in the recovery phase, according to the general crisis management guidelines (Ritchie, 2004; Prideaux, 2009). Mismanaging the crisis holds the potential to produce sectoral collapses such as in airline, tourism, and hospitality services (Loayza & Pennings, 2020). Government involvement is needed in the recovery. An example may be establishing a crisis taskforce to proactively and reactively manage the crisis (Moe & Pathranarakul, 2006), a taskforce that supports local tourism businesses in not merely surviving, but strengthening their capabilities and resistance through technology, productivity initiatives, and skills development. This ongoing crisis might provide a unique opportunity for tourism businesses to reconsider their business model and become more sustainable.

Further, the monograph provides real-time situational analysis for a range of destinations. It can help destination management organisations make more informed decisions and thereby nudge them towards alternative solutions. It addresses the opportunities and areas of improvement that destinations should consider. The book offers great insights into how different kinds of destinations have dealt with the COVID-19 crisis and enable an 'exchange' of ideas among destinations. The importance of crisis preparation and effective crisis management is demonstrated in the monograph. A distinction in the policies suggested and implemented in mature and emerging tourism destinations becomes visible upon reading the various chapters. Above all, this study stresses that the development of the pandemic is the decisive factor determining the tourism industry's reopening. The book offers a refined and nuanced understanding of the health-induced crisis in several tourism destinations with a view to adding to the present body of knowledge and supporting destinations around the world in making more informed decisions.

1.1 PURPOSE

The purpose of this research is to understand the ways (both predicted and unforeseen) the COVID-19 crisis has impacted tourism stakeholders, tourism businesses and their operations during and after it. The aim is to evaluate existing policies so as to better understand their feasibility and adaptability for coping with the crisis. Another purpose is to gain insights from multiple perspectives concerning how destinations can efficiently handle times of crisis with proper policies in order to reduce the negative impacts on the local travel industry and local inhabitants. The aim is to analyse and understand the factors which influence policymaking and to examine the ways the policies function. Overall, the objective is to determine the actions already taken by destinations when the crisis was imminent, the effectiveness of their implementation, how they have been adapting to the changes and what they have learned from this crisis with respect to future responses to similar situations.

1.2 GOALS

- › To identify the challenges and impacts during and after the COVID-19 crisis encountered by tourism stakeholders;
- › to identify the strengths, weaknesses, opportunities and threats faced by tourism destinations with regard to the COVID-19 crisis;
- › to examine the policies' effectiveness and ways of appropriate and adequate implementation during a crisis;
- › to identify tourism policies for responding effectively to the challenges posed by the COVID-19 crisis in the tourism sector;
- › to determine the factors that influence policymaking (for policies both pre and post the crisis); and
- › to examine stakeholder collaboration at selected destinations during a crisis.

1.3 RESEARCH QUESTIONS

- › What are a tourism destination's strengths and weaknesses for coping with the COVID-19 crisis?
- › Which opportunities and threats have tourism destinations encountered during the COVID-19 crisis?
- › How have policymakers been addressing the multifaceted challenges and impacts of the COVID-19 crisis in a destination's tourism sector?
- › Are the policies in place adequate for coping with the COVID-19 crisis?
- › Which policies could be implemented at a destination during and after the COVID-19 crisis?
- › Which factors have influenced policymaking during the COVID-19 crisis?
- › How have/will tourism stakeholders cooperate/d during and after the COVID-19 crisis?
- › Which actions are taken to ensure effective cooperation during and after the COVID-19 crisis?

1.4 METHODOLOGY

With the following chapters' main objective being to analyse policies, researchers studied a range of policies in the literature and case studies on how destinations have tackled crises in order to discover ideas in relation to the COVID-19 episode. Based on secondary data (literature review, a collection of policy responses), SWOT analysis and importance-performance analyses were conducted. The researchers then conducted qualitative research by performing and analysing interviews.

Among qualitative research methods, the interview is probably the most widely employed (Bryman, 2012). Qualitative interviews may be divided into structured, semi-structured or open-ended. For the purposes of this study, semi-structured interviews were conducted as they enabled the researchers to obtain information while leaving them space to probe deeper into the interviewees' experiences (Halperin & Heath, 2017).

This subject matter's novel nature – the COVID-19 crisis – made it crucial to carry out qualitative research and semi-structured interviews. It gave the researchers more flexibility in exploring the topic of crisis management and policymaking in tourism. The interview questions were constructed to help the researchers answer the main research questions and were structured to give the interviewees an opportunity for further elaboration and opinions.

To recruit participants for the interviews, purposive sampling was employed given the focus on the unique context (Miles, Huberman & Saldaña, 2014) of destinations' responses to the COVID-19 crisis. According to Babbie (2008), purposive methods are useful when a study needs to “select a sample on the basis of knowledge of a population, its elements and the purpose of the study”. For this reason, tourism professionals who actively participate in destination policy and strategy formulation were selected in order to address the research questions.

1.5 STRUCTURE OF THE CHAPTERS IN THE MONOGRAPH

The monograph explores the development of tourism policy during the COVID-19 crisis in selected countries and destinations that offer broad insights into the different responses to the global pandemic. The countries and destinations selected are (in order of the chapters in this book):

- › Singapore
- › Uzbekistan
- › Switzerland
- › Macao, China
- › Abu Dhabi, United Arab Emirates
- › La Paz, Bolivia
- › Lillehammer, Norway
- › Funen, Denmark

- › Loire-Atlantique, France
- › Crete, Greece
- › Goriška Brda, Slovenia
- › Piran and Portorose, Slovenia
- › Hvar, Croatia

At the start of each chapter, research and case studies concerning previous crises that have occurred in similar types of destinations are presented so as to form a benchmark and body of knowledge. Based on a literature review, empirical research and interview results, tourism policies that apply to these specific countries and destinations are proposed and presented in a table and further discussed in the results and implications section of each chapter.

The chapters in this monograph each have the following structure:

- › Abstract
- › Introduction
- › Tourism policymaking in times of crisis
- › Crisis management, tourism strategies and policies for coping with crises for the analysed destination type
- › Situational analysis and trend analysis at the analysed destination (SWOT analysis and Importance-performance analysis)
- › Empirical research (Results and implications and Limitations)
- › After the 13 case studies have been presented, the final chapter concludes the book.

2 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN SINGAPORE

Yifan Deng

ABSTRACT

The spread of COVID-19 created a worldwide tourism crisis in 2020 where the challenge is especially acute for Singapore since international tourism is the biggest market in its tourism sector. By applying SWOT analysis and importance-performance analysis to gain insights into Singapore's position in its crisis management responses to COVID-19, encompassing an interview with a destination manager, this study reveals Singapore's crisis management and policy adjustment for dealing with the pandemic. Insights are provided into good practices that have been applied during this unprecedented crisis, even though the recovery appears to depend on the pandemic's status as much as on the strategies. Facing many challenges and domestic constraints, and amidst the trends and opportunities, the Singapore Tourism Board (STB) envisions galvanising the tourism industry instead.

The findings highlight the importance of the cooperation and engagement of all stakeholders. The experiences of Singapore illustrate that, beyond strict cost-cutting and rapid government aid, more active measures such as evolving, reinventing, and reimagining tourism products and destination images could turn a crisis into a catalyst for introducing a more sustainable approach to the recovery strategies and continued tourist development. There are interventions to directly support the industry and workers, and strategies to rebuild the tourism economy after the outbreak. There is no denying that the tourism industry is one of the hardest-hit sectors as the virus spreads, but the Singapore Tourism Board believes this is also a chance for a 'reset', and to motivate the industry and workers to become creative and reskilled. The STB has responded swiftly, putting measures in place to assist the industry, encouraging the tourism sector to leverage its downtime to upskill as well as to look to the future.

2.1 INTRODUCTION

Tourism is easily shaped by exogenous forces like natural disasters, diseases and unexpected events that have profound influences on society (Rosselló, Becken & Santana-Gallego, 2020). The current extraordinary events associated with the outbreak of COVID-19 have severely hit tourism, with impacts on both travel demand and supply (UNWTO, 2020b). The processes of globalisation and international travel accelerate the spread of communicable diseases, and many countries lack adequate funds and necessary healthcare services to combat them successfully. The result of the crisis is multidimensional and has been reverberating across economies and societies, where it is exceptionally acute for states strongly reliant on international tourism (Henderson, 2007b).

Having recognised that the tourism sector is very vulnerable to exceptional events such as COVID-19, this study concentrates on the issues of crisis management and the development of tourism strategies and policies to assist the recovery of tourism. Singapore is chosen as a tourism destination for its representativeness of international tourism and quick policy responses. The findings stem from empirical research and the analysis of secondary data, drawing on the extensive coverage given to the topic by official statements, news media and specialist press. The damaging impacts on both international tourism and domestic activity are examined, while the responses of Singapore's government and tourism industry to these unparalleled challenges are assessed. Attention is focused on the critical period when the outbreak was reaching its peak and in the immediate aftermath, affording insights into the difficulties of dealing with such a situation and solutions to the problems which must be faced. Certain dimensions of the crisis and its management reflect Singapore's unique characteristics, although the observations hold wider applicability beyond its own particular circumstances.

2.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN SINGAPORE

Surveys conducted by Gurtner (2007a) show that overseas trips are perceived to be the most risky in times of crisis, and contagious diseases are attributed with the highest probability of all perceived risks in the overseas travel context. Crises like infectious diseases hold the capacity to seriously disrupt international tourism (Henderson, 2007a). This makes crisis management critical in the management of a tourism destination like Singapore.

Infectious diseases as both a public health and a tourism crisis arrive and unfold at great speed with little warning and few detectable signals. In reality, prevention of COVID by the tourism industry was difficult at the outset and crisis management essentially started with containment and damage limitation. However, the crisis management literature emphasises the industry must pay more attention to planning and the preparing of responses (Henderson, 1999), with Barton (1994) stressing the need to establish a task force with an allocation of responsibilities, set up an effective communications network and systems for monitoring and evaluation, and to formulate coping strategies and policies for actual crises. The tourism industry in Singapore has already overcome a series of crises, from the Asian financial crisis of the late 1990s, SARS in 2003, through to the global financial crisis of 2008–2009. As a small state city, a strong awareness of crisis has been integrated into the national characteristics, making Singapore alert to extraordinary and disruptive events. Learning from the past, immediate measures are supposed to be implemented on both the organisational and individual levels, as well as the technical and establishments level, to cope with COVID.

In the stage of containment and damage limitation, an initial top government priority is to take measures to provide immediate relief for those most directly and adversely hit (Henderson, 2004, 2007b; Meng et al., 2010). The media's role is also important in helping to shape the perception of a crisis and influencing the way people handle the stresses. A healthy relationship with the media is deemed as to be a major component of a comprehensive crisis management strategy (Bland, 2016; Gonzalez-Herrero & Pratt, 1998). Acceptance of responsibilities, transparency, assistance

services, international cooperation, and the alleviation of fear are advocated as preconditions for dealing effectively with tourism health crises (Henderson, 2007a). More communication work via social media from both the perspective of reassurance and tourism recovery should be undertaken in Singapore. Communication channels must be initiated immediately to inform tourists, communities and the travel trade overseas of steps taken to combat the crisis.

After entering the recovery and resolution mode, such as the end of the local transmission of the disease, strategies should shift to restoring confidence and business. Government policies for raising visitor volumes need to be launched, along with financial incentives to support tourism businesses. Marketing and campaigns by institutions and business sectors are also being conducted. Besides, recognising the vital contribution made by residents is important. Policies to stimulate locals to step out of their homes, return to the streets and enjoy life while still exercising vigilance and social responsibility during the crisis are encouraged (Henderson, 2004). Singapore must seek out opportunities to maintain and possibly even grow its brand equity by sending a clear signal that the nation cares about the wealth and wellness of its people and visitors. Meanwhile, tourism enterprises, no matter how big or small, must become more productive, innovative, and digitally savvy to be able to compete for their fair share of the business. Building tourism for the future is becoming a strategy in times of the crisis and economic shutdown. Collective efforts are essential for securing the future of Singapore tourism development. Finally, reflections and learnings should be drawn from the whole process of crisis management, to thereby amend existing crisis management plans and help the tourism destination become better prepared for any eventualities ahead (Cheng, Chua & Ng, 2004).

2.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS IN SINGAPORE

Singapore is a well-known tourist destination that is highly urbanised and industrialised, featuring numerous attractions (Henderson, 1999). Domestic tourism among the population of over 5 million is extremely limited, which makes Singapore concentrated in international markets. Since the outbreak of COVID-19, the Singapore government has implemented series of measures to cope with the pandemic. The Singapore Tourism Board is one of the major official actors in the tourism sector. Representing both government and the industry, it is committed to helping guide tourism businesses and tourists, as well as maintaining Singapore's reputation and credibility as a tourist destination. The future of many tourism businesses in Singapore is under threat and uncertainty, while overall the industry is estimated to be sustaining major losses. The prospect of a prolonged slump is therefore officially viewed with alarm, compounded by projections of heavy losses in the wider economy whilst ever COVID-19 persists. Thus, the government has devoted a great deal of energy and resources to bringing the virus under control.

Table 1: Basic indicators for Singapore

Indicator	Singapore
Area in km ²	725.7
Population (number)	5.7 million
Registered unemployment rate (%)	2.3
Tourism arrivals in 2019 (number)	19,111,343
Tourism arrivals growth 2019/2018 (%)	3.26
Nights spent 2019 (number)	61,635,213
Nights spent growth 2019/2018 (%)	3.1

Source: Department of Statistics Singapore (2019).

2.3.1 SWOT analysis for Singapore in light of the COVID-19 crisis

From the desk research and interview, a SWOT analysis in the table below is generated to present Singapore's strengths and weaknesses as a tourism destination in coping with COVID-19, as well as the opportunities and threats it is facing. Since it is a leading tourism destination with a strong government and an awareness of crisis management, Singapore is able to react fast and live through the crisis sturdily. The country's well-established image as being safe and well-developed helps it build a reputation and gain confidence among tourists. Limited by its inherent weakness and extrinsic threats, Singapore seeks to explore more opportunities for its tourism industry after COVID-19.

Figure 1: SWOT analysis for Singapore

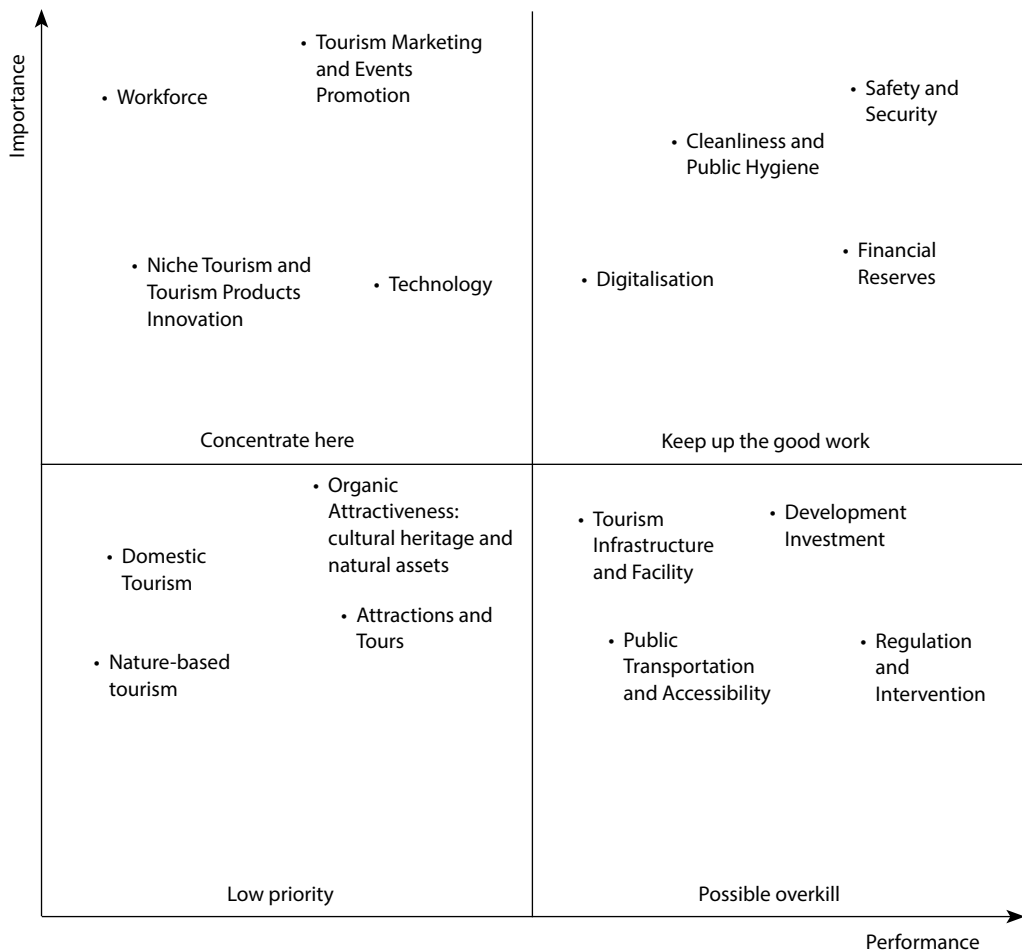
Strengths	Weaknesses
<ul style="list-style-type: none"> › A leading tourism destination in Asia › Safe and well-developed › Worldwide recognition as a MICE destination › Awareness of sustainability and crisis management › The country's limited entry and exit points › Year-round tourism › Strong government 	<ul style="list-style-type: none"> › Limited recourse › Man-made attractions › Densely populated › Limited natural environment › The domestic market is relatively small › Lack of local workforce
Opportunities	Threats
<ul style="list-style-type: none"> › Innovation and the recognition of new markets › Abundant financial reserves › Advanced modern technology › World-leading medical system › Placemaking of a clean and green city › The open and transparent information disclosure system › Increasing discerning travellers 	<ul style="list-style-type: none"> › Uncertainty of the crisis › A competitive tourism destination in Southeast Asia › Heavily reliant on international tourism

Source: Destination Manager (personal communication, 5 April 2020); Own work.

2.3.2 Importance-performance analysis for Singapore during the COVID-19 crisis

Importance-performance analysis (IPA) is frequently used in tourism research given its easy application and clear interpretation of both data and suggestions, and thus leads to the identification of practical strategies (Martilla & James, 1997; Oh, 2001). As shown in the figure below, a set of key elements is presented according to their importance and performance with regard to Singapore’s tourism response and recovery in coping with COVID-19. Strategies are generated in four quadrants accordingly. In response to the COVID-19 crisis management, it is important to balance the efforts to keep up the good work and concentrate more on the important elements that hold big opportunities for a performance improvement.

Figure 2: Importance-performance analysis for Singapore



Source: Destination Manager (personal communication, 5 April 2020); Own work.

2.4 EMPIRICAL RESEARCH

The empirical research was conducted with the STB, supported by an interview with a destination manager in Singapore (personal communication, 5 April 2020), which collected information on the measures and reactions in coping with COVID-19 from various aspects. The interviewee was asked to describe their responses in terms of the crisis management, and insights were provided about the development of tourism policy, which are incorporated into the following account.

2.4.1 Results and implications

Recognising that tourism has been among the most affected sectors facing the major and evolving challenges brought by COVID-19, policies have been designed to support tourism businesses, visitors, residents, and other stakeholders in navigating the unprecedented social and economic emergency in Singapore.

Tourism is all about people, and is based on the interaction amongst people, thus UNWTO (2020c) urges the tourism sector to commit to putting people and their well-being first. Responsibility and heightened coordination among tourism organisations and businesses are called for to ensure that the health measures are implemented. The responsible tourism policy is encouraged in times of COVID-19. The health of the locals and visitors is the top priority during this period, and it is important for them to stay safe, take the necessary health precautions and look out for each other (Singapore Tourism Board, 2020a). Tourism stakeholders including travel agents, event organisers, hotels, operators of attractions, entertainment, and F&B should accept responsibility for complying with the precautionary measures to assure the safety of both employees and visitors. The STB provides necessary and clear operational guidance to tourism stakeholders on the precautionary measures, such as social distancing, staggered entry, adoption of a contactless approach, health declaration measures, sanitisation and disinfection. Experience also suggests that publicised images of incompetence, negligence, instability and inefficiency during times of adversity can exacerbate and/or prolong crisis conditions. Thus, an emphasis on responsible and transparent media communication is needed.

Although tourism is currently among the worst hit of all economic sectors in the crisis, it is uniquely positioned to help societies and the communities affected to return to growth and stability due to its cross-cutting economic nature and deep social footprint (UNWTO, 2020d). Tourism has consistently proven to be a strong and resilient sector not only for bouncing back after a crisis but is also able to lead the wider economic and social recovery (United Nations, 2015). The STB recognises the importance of adjusting tourism development to meet the trends and turning challenges into opportunities amid an intensifying battle with the crisis. The policy of quality tourism aims to help the tourism sector not only recover from the unmatched challenge of COVID-19 but to prepare to come back stronger, better, and more sustainable. The development of quality tourism comprises goals to keep tourism as an important economic driver for Singapore, lead industries to become more productive and innovative, create better jobs for residents, and nurture the public's participation and engagement.

The destination's safety, security and cleanliness will become the dominant concerns of tourists after the COVID-19 crisis. A destination with a high level of sanitisation and hygiene is easy to stand out from the competition. Singapore is often dubbed one of the cleanest cities in the world, topping multiple publications' rankings when it comes to tidiness and sustainability. The SG Clean policy seeks to reduce current public health risks relative to COVID-19, where the long-term objective is to raise the level of cleanliness and public hygiene in Singapore, safeguard public health, and instil awareness of good hygiene and cleaning practices by encouraging tourism stakeholders and members of the public to do their part to adopt good personal habits and social responsibility (Singapore Tourism Board, 2020b).

In the midst of the circumstances created by a crisis, it is often tourism businesses and workers in the host community that experience financial and emotional hardship. The STB has unveiled relief packages to tide the hardest-hit businesses over during the crisis by supporting business in paying their costs and enhancing their cash flow and credit, which has constituted various forms of tax reduction and rebate, temporary bridging loans, rental waivers, the deduction of expenses for renovation and refurbishment etc. (Singapore Tourism Board, 2020b). As the crisis is expected to persist, the tourism sector is advised to save jobs, build confidence and add to employees' capabilities to prepare for the recovery and growth. Measures like supporting tourism companies in upgrading their capabilities, defraying the costs of the business transformation, and enhancing training support and skills development could give those operating and working in the sector some respite during this trying period. Taken together with other SkillsFuture initiatives (Singapore Tourism Board, 2020a), such steps will better position companies and individuals for the medium and long term. They will also ensure that businesses reliant on tourism will have the human resources they need to meet the demand when it returns.

Table 2: Policies suggested for Singapore

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Responsible Tourism	Yes	Precautionary measures for all tourism stakeholders	Singapore Tourism Board Ministry of Health	Operational guidance
		Management of mass gatherings and events as well as public venues	Singapore Food Agency Enterprise Singapore Singapore Visitor Centre	Operational Guidance
		Safeguard the health of locals and visitors	National Environment Agency	Advisories of tourists and locals Prevention practices
Quality Tourism	Yes	Pursuing a yield-driven marketing approach	Singapore Tourism Board Economic Development Board Enterprise Singapore Ministry of Manpower	Return of marketing investment
		Enhancing the destination's attractiveness		Tourism receipts Tourist satisfaction
		Supporting the industry's competitiveness		Business diversity Workforce capacity and capability Operational efficiency and innovation Company profit
		Building local engagement and participation		Local residence satisfaction Employment rate
SG Clean	Yes	Ensuring public spaces are clean	Singapore Tourism Board Enterprise Singapore	Public Health Act Mandatory cleaning standards Frequency of cleaning and disinfection
		Instilling greater awareness of personal hygiene and cleaning practices	Ministry of Environment and Water Resources National Environment Agency	Social norm Habits of good public hygiene
		That all tourism establishments adopt the SG Clean Quality Mark	Ministry of Education Singapore Food Agency Ministry of Education Ministry of Transport Early Childhood Development Agency	Checklist of requirements for sanitation and hygiene standards The SG Clean quality mark certification
		Building the destination's image as clean and safe		Marketing mechanism Tourist feedback

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Resilience and SkillsFuture	Yes	Stabilisation and support of tourism businesses and enterprises	Singapore Tourism Board Trade Associations and Chambers Workforce Singapore Enterprise Singapore Singapore Exhibition and Convention Bureau Singapore Hotel Association Food, Drinks and Allied Workers Union Minister for Manpower Ministry of Trade and Industry Ministry of Education Singapore Business Federation	Unemployment rate Mortality rate of SMEs
		Employee upgrading, and talent and leadership development		Number of participants Job growth Salary growth Human capital development
		Building tourism sector capabilities while ensuring a healthy pipeline of events, products and experiences		Tourism investment Tourism infrastructure and facility development
		Tourism business and product upgrade and innovation		Technology innovation and adoption Productivity and competitiveness Development of new products and product rejuvenation
		Enhancing the vibrancy of Singapore as a tourist destination		Number of quality events Innovation of content Brand development Consumer experience
		Exploring new tourism markets with strong tourism potential and scalability		The existing quality tourism software Development of niche markets
		Marketing innovation and e-commerce		Marketing & channel development Digitalisation
		Improving the visitor experience and satisfaction in Singapore		Visitors' satisfaction Content enhancements Development of new experiences

Source: Destination manager of Singapore (personal communication, 5 April 2020).

2.4.2 Limitations

This study is subject to a number of limitations. Due to the limited time and current unparalleled situation in the tourism industry, the response rate in the empirical research was disappointing. Supported by a personal interview, the manager of the STB gave an extensive interview and offered a broad perspective. Yet, given the small sample size, the participant's opinion might not represent the whole national organisation. Given that the crisis is still fresh and ongoing, the trade press and general media were also used as information sources with the intention of collecting the reactions and measures for coping with COVID-19 with respect to various aspects of operation. Another limitation is that the policies were created in a context specific to Singapore and are not generalisable across a wider range of destinations. Considering this crisis' evolving and uncertain nature, it is premature to estimate the impact on international tourism and unrealistic to seek to evaluate the effectiveness and implementation of tourism policies for dealing with COVID-19.

While acknowledging the limitations of the survey, the volatile and uncertain trajectory of the outbreak, and the dangers of generalisation based on one destination, the results still provide an insight into Singapore's tourism policy development and management during the era of COVID-19, and suggest that areas remain for further research into the problems, and additional revisions of possible solutions.

2.5 CONCLUSION

The outbreak of COVID-19 and its repercussions for Singapore reveal international tourism's vulnerability to the real and perceived dangers of an infectious disease. The challenge is particularly acute for destinations where international tourism is a major source of revenue and employment, and the domestic market is relatively small. While revealing the worldwide challenges for tourism posed by COVID-19, this study discloses certain distinct qualities of Singapore, which should be highlighted. The characteristics of Singapore's politics, society, economics and geography create a unique foundation and represent an advantage for its policymaking while dealing with certain features of the pandemic and its aftermath.

Unfortunately, such health-related crises are likely to recur, and the prevailing forces of globalisation still facilitate their spread. Although the ensuing difficulties are essentially beyond the tourism industry's control, the study of Singapore shows the crisis can also be an opportunity to grow new markets, improve the products, upgrade hardware, upskill staff, and earn respect for and enhance the destination's image. Singapore's relatively authoritative society brings an advantage while introducing new laws, regulations and strategic plans. The government has responsibilities to meet regarding protecting the welfare of both citizens and travellers, and supporting the tourism economy. It must do so while taking full advantage of their resources and strengths, yet still being creative, anticipating recovery and keeping channels of communication open and transparent with up-to-date information.

COVID-19's impact has been felt across the world with heavy losses being predicted for tourism as a whole. The implementation and effectiveness of crisis management during the phase of the virus' outbreak in Singapore is an area for continuing analysis alongside a comprehensive review of the regional and global reverberations held by COVID-19 for the future.

3 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN UZBEKISTAN

Gulsanam Rozikova

ABSTRACT

The COVID-19 pandemic has put a halt to all types of tourism operations, causing a total shutdown of the sector globally. To analyse the scale, impact and consequences of the crisis, this chapter considers the case of Uzbekistan. Situational analysis and a discussion of the policies being implemented at the destination are based on the latest information available from official government websites and UNWTO statistics. A representative of the Tourism Committee of Uzbekistan, namely of the Destination Management Organisation (DMO), the main policymaker for the tourism sector, was interviewed to discuss the policies concerning the crisis and the Committee's plans for the post-crisis recovery period. Based on desk-study knowledge and the interview, six specific policies are proposed. Inferring from the interview, the DMO is largely focused on improving services and facilities at the destination while supporting tourism businesses financially during the crisis. Policies are presented in a table and analysed in detail in the section on policy creation. The chapter may be useful for researchers by offering a general perspective on the crisis, policymaking strategies and their implementation in the emerging tourism destination of Uzbekistan.

3.1 INTRODUCTION

Uzbekistan is located in the heart of Central Asia. It is a dual landlocked country with a distinctly continental climate and consists of 12 regions and the autonomous republic of Karakalpakstan. The country possesses seven intangible cultural heritage sites (atlas and adras making traditional technologies, Navruz festival, traditions associated with plov, Shashmaqom, cultural space of Boysun, Katta Ashula, Askiya) and hosts five UNESCO Heritage sites, namely, the Western Tyan-Shan mountain ranges and four museum-cities: Khiva, Bukhara, Samarkand, Shakhrisabz (Permanent Delegation of Uzbekistan, n.d.). Owing to its historical location at the crossroads of the Silk Road, the country has developed an inimitably rich culture, national music, dances, cuisine, applied arts (ikat-making, ceramics, metal engraving, miniature painting and much more).

Tourism is a fragmented and fragile industry closely interconnected with many other spheres of the economy (Lubbe, 2003). The increased volume of international tourism activity combined with the growth in longing for new experiences and exotic, off-the-beaten-track destinations mean that both tourists and host communities are subject to higher risk (Drabek, 1995; Murphy & Bayley, 1989). Especially in the case of health-related catastrophes, easy access to all parts of the global village ensures the faster dissemination of a disease.

As soon as the first case of COVID-19, a highly contagious disease initially without a cure or vaccines, was detected in Uzbekistan in mid-March 2020, the government halted all forms of transport and closed the borders, without clearly indicating the duration of the lockdown period.

The government organised charter flights to allow foreign visitors stuck in the country to leave and to bring back its citizens who had been travelling abroad towards the end of March. With the crisis surprising the Tourism Committee of Uzbekistan (the Destination Management Organisation (the DMO), which had been working hard on developing and promoting the destination and enjoying the remarkable annual growth of tourist arrivals over the preceding 3 years, the DMO managed to devise quick response strategies and policies to save the emerging tourism industry. The course of actions taken by the DMO to mitigate the crisis' impacts and its plans for the future to regain the previous level of success are presented in more detail later in the chapter.

The first part of this chapter introduces crisis types in tourism, the policies and strategies to follow during this crisis, basic indicators and tourism trends in Uzbekistan, along with SWOT and importance-performance analyses (IPA) for the destination. The second section elaborates on policy creation in Uzbekistan during the COVID-19 crisis and offers a list of proposed and implemented policies to reduce the pandemic's consequences. Finally, the third part focuses on empirical research with respect to its purposes, methods, the results and a discussion of the implications, followed by the conclusions and limitations of the research.

3.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN UZBEKISTAN

Crisis management is defined as a set of strategies, processes and measures designed and implemented in practice to prevent and cope with a crisis (Glaesser, 2006). According to Speakman and Sharples (2012), destination managers must respond to the immediate problems first to ensure the safety of the residents and travellers, later focusing on maintaining or reconstructing the tourism sector. Ritchie (2004) proposes a crisis response framework that has three stages: 1) pre-crisis planning; 2) crisis response and recovery; and 3) resolution and future learning. The framework is quite flexible and leaves space for diverse approaches considering the length and impact of a crisis.

Crisis coping has a defeating character. It involves increased influence over and control of the industry by an organisation in charge. The main goal of the organisation upon a crisis' outbreak is to mitigate the negative consequences and bring an end to it as soon as possible by employing all management instruments available (Glaesser, 2006). Tourism policies to be implemented by the governments (or relevant agencies) often tend to focus on economic targets (Tarinc, 2017).

Based on Faulkner's (2001) tourism disaster management guidelines, COMCEC (2017) proposed the crisis management framework below to better understand the stages of a crisis and possible response actions: 1. Pre-event, working on the contingency plan, which includes crisis prevention methods shaped by past experience; 2. Prodromal, initiating the contingency plan to respond to the crisis; 3. Emergency, taking protective measures during the crisis; 4. Intermediate, addressing the short-term needs and administering a clear communication strategy; 5. Recovery, restoring the infrastructure, facilities, and tourist attractions, bringing about a coordinated and sustained marketing response in the mid to long term; 6. Resolution, reviewing the actions taken to feed into other contingency plans to prevent future crises based on the newly acquired knowledge.

Since Uzbekistan positions itself as a Silk Road destination offering historical and cultural tour packages, this section reviews crisis management policies implemented in China, another major Silk Road destination, during the SARS outbreak to draw parallels. Like Uzbekistan, China was experiencing positive tourism growth up until mid-March 2003 when the government issued a travel restriction notice to prevent the disease's spread in certain regions. The government implemented economic, financial and administrative measures, including waiving taxes, low-interest loans and returning quality performance deposits (Gu & Wall, 2006). According to Gu and Wall (2006), revival of the tourism market took place step by step, with local and inter-provincial travel resuming first in June followed by inbound travel activities in July. The next post-crisis policies to reboot tourism were used by travel intermediaries to attract long-haul customers, large-scale promotional activities to enhance awareness abroad, and strengthen advertising in consumer markets. Regional tourism establishments reorganised their products to meet the possible changes in preferences and demand, developed new itineraries to support visitors' mental and physical health, and adopted an approach of 'low price start-up – revitalise promotion – return to normal' (Gu & Wall, 2006).

3.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS IN UZBEKISTAN

Cooper et al. (1998) suggest that governments can act as the driving forces of tourism development by being involved with tourist organisations on multiple levels (provincial, national, international) as a major stakeholder in planning, promoting and management of the destination. Uzbekistan is a good example of this statement because all destination development projects, regulations, and promotional campaigns in international markets are initiated and carried out by the Tourism Committee, one of the biggest state bodies in the country directly funded from the budget.

Tourism in Uzbekistan has been growing, seeing about 30% annual growth in the years before the pandemic. The country promotes itself as a Silk Road destination. Main attractions are three major Silk Road cities (Samarkand, Bukhara, Khiva), which are all included on the UNESCO Heritage List as museum cities under open sky.

Since the major political changes following the death of the country's first president in late 2016, Uzbekistan has opened itself up to the world by introducing a visa-free regime for more than 100 countries, providing immense legal and financial support to tourism enterprises, opening its borders with its neighbouring countries and engaging in worldwide promotion, seeing the destination triple the number of its international tourist arrivals between 2016 and 2019. Despite the growth in arrivals from Europe, South-East Asia and North America, still around 80% of international visitors in Uzbekistan are from the CIS countries (Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan, 2 April 2020).

Currently, both the local and international tourism activities are on halt due to the nationwide lockdown. The DMO is successfully passing over stages 3 & 4 (in Faulkner's guidelines) of the COVID-19 crisis by timely addressing the short-term needs and protecting tourism businesses

from collapse. However, it is unclear whether the DMO's recovery policies will be effective or fail because the scenario of 'new normal' lifestyles as shaped by the present social-distancing rules has been overlooked.

Table 3: Basic indicators for Uzbekistan

Indicator	Uzbekistan
Area in km ²	448,978 (SCRUS, 2020)
Population (number)	34,091,225 (SCRUS, 2020)
Registered unemployment rate (%)	9 (MELRRU, 2020)
Tourism arrivals in 2019 (number)	6,748,500 (Destination Manager, 2 April 2020)
Tourism arrivals growth 2019/2018 (%)	26.23 (author's calculation)
Nights spent in 2019 (number)	4,700,000 (Destination Manager, 2 April 2020)
Nights spent growth 2019/2018 (%)	91 (author's calculation)

Source: as shown in the table.

3.3.1 SWOT analysis for Uzbekistan in light of the COVID-19 crisis

A SWOT analysis for Uzbekistan was drawn up following an interview with the Destination Manager and the author's own experience of working as a tour operator in the destination for over 3 years. Figure 3 below presents not only the strengths weaknesses, threats and opportunities in the country during the COVID-19 crisis, but also some major favourable circumstances for tourism and issues that require immediate attention from the destination's managers and other industry representatives to facilitate a faster recovery following the crisis.

The small share of tourism in the economy of Uzbekistan is mentioned here as a strength, meaning that economic damage from the lost tourism income will be less dramatic during the COVID-19 crisis than for other destinations which depend more heavily on tourism. The opportunities section refers to activities which the COVID-19 crisis has allowed the DMO to work on with a view to enhancing the destination's attractiveness to tourists. The weaknesses section lists the general deficiencies of the tourism sector in Uzbekistan; both the author and the Destination Manager consider these weaknesses as an impediment to the recovery process in the post-crisis period.

Figure 3: SWOT analysis for Uzbekistan

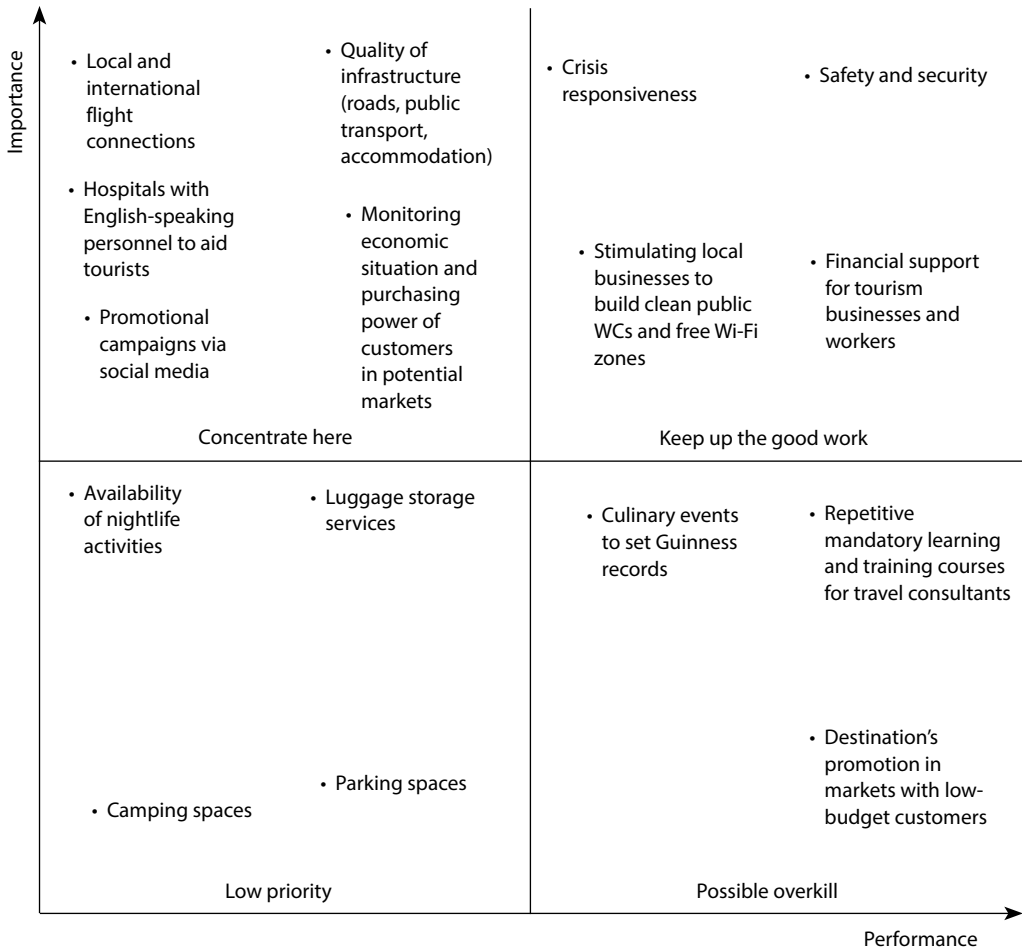
Strengths	Weaknesses
<ul style="list-style-type: none"> › Safety (low crime rate) › Small number of confirmed cases of COVID-19 › Absence of well-preserved cultural UNESCO Heritage sites in the neighbouring countries › Small share (2.7%–2.9%) of the tourism industry in the country's economy › Reputation of being a relatively cheap destination to travel to, i.e. the price-value ratio is attractive › Significant financial and legal support from the government for tourism-related companies both before and during the COVID-19 crisis › The very hospitable and friendly local population creates a positive image 	<ul style="list-style-type: none"> › No access to the sea (dual landlocked country) › Underdeveloped road and air transport, particularly on international routes › Shortage of qualified tourism professionals › Lack of high-quality accommodation › Low sustainability awareness › Emerging destination, absence of a well-recognised brand image
Opportunities	Threats
<ul style="list-style-type: none"> › Diversifying the tourism products to be offered › Improving accommodation facilities throughout the country › Educating and training tourism sector workers › Reflecting on mistakes and experience concerning overtourism management › Adapting to the changed preferences of potential consumers 	<ul style="list-style-type: none"> › Possibility of losing newly opened businesses and newcomer investors in the tourism industry during the COVID-19 crisis › Ongoing seasonality of tourism arrivals despite the efforts to attract visitors during low seasons › Possibility of qualified professionals leaving the tourism sector due to the COVID-19 lockdown › Low demand from domestic tourism consumers after the COVID-19 crisis

Source: Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan (personal communication, 2 April 2020); Own work.

3.3.2 Importance-performance analysis for Uzbekistan during the COVID-19 crisis

The IPA analysis below reflects the major aspects of tourism in Uzbekistan as concerns its importance-performance rating. Particular spheres show an unsatisfactory performance due to the lack of proper attention and investment, while others are performing quite well even without much involvement of the DMO. It should be noted that the figure contains not only the issues that have arisen during the COVID-19 crisis, but also the aspects in need of improvement that will help the destination maintain its attractiveness and scramble out of the crisis after it has ended.

Figure 4: Importance-performance analysis for Uzbekistan



Source: Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan (personal communication, 2 April 2020); Own work.

3.4 EMPIRICAL RESEARCH

This part of the chapter discusses the essence of the interview with the destination manager, elaborating on the policy implications and the study's limitations. An interview with the Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan (personal communication, 2 April 2020) was held by phone and via the exchange of follow-up messages on a messenger to clarify certain specific points in early April 2020.

3.4.1 Results and implications

The most striking part of the interview with the Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan was that the DMO had already implemented over half the policies within the first 2 weeks of the lockdown, despite not having specific policies prepared in advance for the crisis. Moreover, the main sketch of the future policies to be put into effect upon termination of the quarantine period had also been completed.

As demonstrated in the SWOT analysis section in Figure 3, the high rating of the destination's safety and security, absence of well-preserved cultural UNESCO Heritage sites in the neighbouring countries, small share (2.7%-2.9%) of the tourism industry within the country's economy, reputation of being a relatively cheap destination to travel to, i.e. its price-value ratio is attractive, the significant financial and legal support from the government given to tourism-related companies, the very hospitable and friendly local population creating a positive impression were mentioned as the destination's biggest strengths.

Indeed, when they visit Central Asia 60% of travellers from Europe and the Americas go on combined tours involving at least two countries, one being always Uzbekistan. The neighbouring countries have rich natural sites (mountains, Pamir Highway, deserts, lakes) and thus promote mainly nature-based travel packages. In case a visitor wishes to combine a cultural or gastronomic tour with eco-trips, they must choose Uzbekistan since all of the major well-preserved architectural sites are located in Uzbekistan. Besides, the Uzbek cuisine is so famous in the region for its variety of meals and flavours that even the residents of the neighbouring countries visit Uzbekistan to try authentic food there. As for the small share of tourism revenues in the country's GDP, this factor is a strength in the crisis because it is easier for the government to bail out the companies and fewer people will join the ranks of the unemployed if laid off. The destination's major weaknesses with respect to the crisis are the lack of professional specialists in tourism and the low sustainability awareness among the local stakeholders. The DMO is worried that tourism enterprises might lose even the few professionals that are employed in tourism if they decide to leave for other industries during the crisis.

In fact, the pause provided by the COVID-19 pandemic is highly valuable for the DMO as it had time to improve the quality of the services and accommodation facilities, diversify the tourism products it offers and, most importantly, to reflect on the mistakes and experience of dealing with the overtourism faced during 2018 and 2019. The only major current threats to the tourism industry are the possibility of losing new investors and professionals who might prefer other business opportunities (e.g. restaurants). In sum, the DMO has gained more opportunities to develop as a destination than it has experienced threats.

The challenges engendered by COVID-19 are mainly addressed through financial instruments. Short-term problems are discussed with private businesses and the financial support schemes are developed based on their needs. The existing policies and regulations required the government's considerable involvement in the development, promotional and educational aspects of tourism

in the destination. This factor helped policymakers respond swiftly to the crisis issues (within 2 weeks) (Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan, personal communication, 2 April 2020).

Uzbekistan adopted policies similar to the measures applied by the Chinese government during the SARS crisis.

Policy 1. Fiscal policy, i.e. waiving or postponing of tax payments, was the first policy to be implemented upon the introduction of the country-wide lockdown in March. The government's goal was to prevent employee lay-offs and bankruptcies by relieving the tax burden.

Policy 2. With the aim of retaining experienced tourism specialists within the industry, the Tourism Committee in cooperation with the Ministry of Employment and Labour Relations created a database of people who had lost their jobs at tourism-related enterprises. The Committee is negotiating the issue of unemployment benefits for these workers during the pandemic with the Ministry of Finance.

Policy 3. Tourism businesses have been given zero-interest loans to redesign their products, improve their services and create new travel products given the changing preferences of visitors during the pandemic. Green&Eco projects are being carried out to establish green technologies for power supply, improve waste disposal and water usage (The State Committee of the Republic of Uzbekistan for Tourism Development, 2020).

Policy 4. To make the best use of the break provided by the crisis, the DMO decided to work to upgrade tourism services and accommodation quality. A school linked to the Tourism Committee launched online courses for waiters, guides, cooks and travel consultants to study during the low season. The online platform uzsogda.com was launched to assist craftsmen from various parts of the country realise their hand-made products.

Policy 5. The Destination Manager admitted that tourism arrivals in 2019 had exceeded their expectations, which had a negative effect on the quality of the tours due to the limited transportation and accommodation capacity, particularly in popular tourist cities. Thus, the DMO is making significant investments to develop underpromoted areas holding immense tourism potential, i.e. the Termez archaeological sites, Aral Sea tours, and health resorts in mountainous areas. Local branches of the Tourism Committee in the regions are personally visiting residents' houses to encourage them to repurpose part of their houses for tourism as family accommodation. From 2020 on, the DMO will work on fostering agricultural and gastronomic tours. The ultimate goal is to reduce unemployment in remote areas and improve the infrastructure.

Policy 6. The DMO has continually engaged in marketing campaigns in source markets since 2017. Its Facebook page constantly shares the latest tourism-related news, presidential decrees, and organises photo&video contests about popular sites in Uzbekistan. During the first lockdown, the DMO created 360 panoramic videos of the ancient cities included on UNESCO's Heritage list and online 3D maps of the major tourist cities. The DMO is also already supporting cooperation between local and foreign tour operators and various ventures that could enhance foreigners'

awareness of Uzbek culture, e.g. the opening of an applied arts shop in Greece, online webinars with tourism experts from the UNWTO and neighbouring countries to discuss the anti-crisis policies. The DMO is planning to strengthen advertising through film production in cooperation with Hollywood-based film-making companies, influencers' posts and by encouraging cheaper prices at the destination following the crisis.

The DMO's policymaking process has always been generally affected by economic factors (lowering the unemployment rate, increasing foreign currency inflows, developing the infrastructure in remote regions with the help of tourism revenues). The Destination Manager stated these factors would retain their importance during and after the crisis (Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan, 2 April 2020).

Stakeholders and the DMO communicate at personal meetings prior to the introduction of significant changes or new practices. The DMO discusses the major projects with the stakeholders by sending them the project details by email and collecting their related opinions. Finally, the DMO often arranges info-tours for the tour operators and mass media representatives to various tourist regions when they are planning to promote new travel routes or has made significant improvements to the area's infrastructure so that the tour operators can see personally what their tourists will experience when they buy tours.

The only unrealistic point of the policies discussed with the DMO representative was their implementation period and expectations of a fast recovery. The World Travel and Tourism Council (WTTC, 2016) evaluates a destination's average recovery period after different types of crises as follows: Political turmoil - 26.7 months, Terrorism - 13.0 months, Pandemic - 21.3 months, Environmental disaster - 23.8 months. Observing the total tourist arrivals in Uzbekistan between 1997 and 2019 (UNWTO, 2019) reveals that the terrorist attacks of 1999 combined with the political instability in the country in 2005 drastically affected the tourist arrivals, plummeting from 811,000 in 1998 to 242,000 by 2005 and taking 1.5-2 years to regain their pre-attack levels, we can confirm the recovery time projection suggested by the WTTC coincides with reality to some extent.

This means we may reasonably assume the period of recovery after the global pandemic might last at least 21.3 months. The Destination Manager mentioned that they were planning to implement policies to cope with the crisis within a 6-month period (July-December 2020) and expecting to regain the pre-crisis level of tourism activities' performance by the end of 2021 (Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan, personal communication, 2 April 2020). Compared to the almost 2.5 years of recovery period estimated by the WTTC, the DMO's anticipations of recuperating from the crisis are very optimistic, especially when we consider the current pandemic is affecting the whole world.

A July 2020 update: on 19 July 2020, the number of officially confirmed cases of COVID-19 in Uzbekistan had exceeded 16,600 people (Worldometer, n.d.). The government lifted the lockdown restrictions on 10 May, the situation was stable for about 1 month, but after mid-June the number of infected patients was increasing dramatically. The country announced a second lockdown between 10 July and 1 August. Inspired by the stabilisation period, the Tourism Committee started its campaign to attract tourists to Uzbekistan by promising to cover treatment expenses

of up to USD 3,000 for any visitor who catches COVID-19 on their tour, and launching the Safe Travel Guaranteed system as a mandatory order, i.e., only those establishments registered in and approved by this system were allowed to serve tourists. Finally, the Open Skies regime will be enforced by three Uzbekistan airports from 1 August 2020 (The State Committee of the Republic of Uzbekistan for Tourism Development, 2020).

Table 4: Policies suggested for Uzbekistan

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Fiscal relief	Yes	Relieve the tax burden on private businesses Reduce the number layoffs during the crisis Minimise possible bankruptcies in the sector	Tourism Committee of Uzbekistan State Tax Committee Ministry of Finance	Tax holiday in place from 1 April 2020 until 1 October 2020
Unemployment benefits for laid-off workers of tourism businesses during the crisis	Yes	Develop registration schemes for recently unemployed workers and a budget amount for benefits Create a database of experienced tourism workers for future employment Keep experienced professionals in the tourism sector	Ministry of Employment and Labour Relations Ministry of Finance	The availability of funds The existence of payment schemes and the registration procedure for the unemployed Estimated and actual number of laid-off workers
Financial support to enterprises offering tourism- related products and services?	Yes	Ensure the adequate capacity and supply of tourism infrastructure and superstructure in the post-crisis period Increase the destination's tourism attractiveness through improved quality Develop situational assessment and investment schemes for companies claiming financial support	Ministry of Finance Tourism Committee of Uzbekistan	The number of interest-free loans and subsidies provided to tourism-related companies Availability of funds Existence of assessment and investment schemes

3 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN UZBEKISTAN

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Improving tourism services and accommodation quality?	Yes	Educate and train online the employees of tourism-related companies during the lockdown Revise the standards of excellence for accommodation categories Inspect hotels to verify whether they meet the requirements of their claimed stars Design quality assurance certificates for hotels Propose an investment scheme for entities willing to renovate their facilities	Tourism Committee of Uzbekistan Chamber of Commerce and Industry of Uzbekistan Hotels	Existence of excellence standards to measure the quality of the services and accommodation facilities Availability of funds for investment The number of quality assurance certificates issued The number of participants in the online courses provided by the Committee
Diversification of tourism products offered by the destination	No	Design new cultural and nature-based travel packages to engage more regions in tourism activities Improve local infrastructure and accommodation facilities in the regions with potential to attract travellers Divert the heavy tourist flow from major cities suffering overtourism Decrease unemployment level and assist the local economy in the newly developed areas through tourism activities	Tourism Committee of Uzbekistan Regional municipalities Ministry of Transport Ministry of Finance	The number of tourism-related jobs created in the regions The number of new travel packages in ecotourism, agritourism and gastronomic tourism supposed to have been developed The number of visitors to the newly developed regions The availability of transport to reach the promoted regions
Launching aggressive marketing campaigns in the major tourism markets?	No	Set the target level of tourist arrivals expected in 2021 Outsource some efficient international marketing companies Assure consumers that the destination is safe Promote existing and new tourism products (nature-based tours) prepared during the crisis	Tourism Committee of Uzbekistan Outsourced marketing companies Ministry of Finance	The number of marketing channels employed The funds available for the campaigns The number of international tourist arrivals in 2021

Source: Head of the Department of Analytics and Information Management of the Tourism Committee of Uzbekistan (personal communication, 2 April 2020).

3.4.2 Limitations

The restricted time frame and communication modes did not allow the researcher to study the COVID-19 crisis' impacts on private tourism businesses. Extensive research and data compilation are required to obtain a realistic picture of the situation at the destination.

Since simple qualitative research does not allow the author to produce reliable results, the proposed policies and situational analysis set out in this chapter might be strongly affected by the interviewee's subjective view of the situation, the author's personal reflections based on the information gathered from the state documents concerning tourism development, the news media and social media posts written by the local community witnessing the crisis on location.

Finally, the empirical part of the research is based solely on the interview with the manager of the DMO. The author cannot verify the extent to which the crisis management policies are implemented in reality without studying the perspective and financial position of private tourism businesses during the crisis.

3.5 CONCLUSION

The interview with the DMO representative for this research chapter provides practical insights into the working process of the organisation, its expectations and the principles which underpin the current and future tourism strategies and policies. Even though the DMO is very focused on the economic benefits of tourism, it seems to be handling the crisis well at present. It is quite possible that the tourism sector's small size in the Uzbekistan economy may have facilitated the crisis management process.

Unfortunately, the DMO is facing a crisis on an international scale for the first time, and thus it cannot fully ascertain the dangers of the pandemic and the extent of the changes it might bring to people's lifestyles and travel habits. The DMO is making optimistic projections based on its existing knowledge as gained from a desk study of how other destinations recovered from SARS, Ebola, H1N1 or mad-cow disease. The Committee does not have practical experience of responding to a health-related catastrophe. Thus far, it has dealt with the impact of local terrorist attacks or political changes on inbound tourism. This makes it quite likely that it is overlooking the negative impacts that their potential tourism markets might encounter. The hidden danger of the worldwide crisis during an era of globalisation and open markets is that the DMO is incapable of dealing with the problems of external markets. Therefore, even if it successfully overcomes the crisis at home, the fate of potential customers remains unknown. These factors make it difficult for both researchers and the DMO to model reliable forecasts of future developments. The global nature, unknown extent of consequences for economies, and uncertain exit date from the pandemic leave many questions unresolved about the efficiency of the policies being implemented.

This chapter sheds light on the tourism sector's condition in Uzbekistan superficially by analysing the DMO's policies during the COVID-19 crisis and for the period following the lockdown. The absence of official up-to-date tourism data, academic studies on tourism in Uzbekistan and the

lack of research on tourism sustainability at the destination all demand further extensive research, which could help pinpoint the reasons for the success or failure of the current crisis-era strategies and policies.

4 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN SWITZERLAND

Judith Hueber

ABSTRACT

The destination of Switzerland is used as a practical example; after applying the theoretical foundations, suggestions for future actions based on the current Swiss tourism policy plan are offered.

The chapter seeks to address the paucity of research on the topic of crisis management regarding COVID-19 in the tourism industry. The project was undertaken during the peak of COVID-19's presence in Europe and thus the difficulties faced by Destination Management Organisation (DMO) in responding during those chaotic and stressful times must be emphasised. On the other side, chaos and change are important aspects of the public and private sectors and should be embraced and considered in modern tourism management (Ritchie, 2004). The tourism industry is viewed as an interconnected system and a holistic approach is applied.

This chapter is mainly occupied with tourism policies and the role played by the DMO in coping and recovering from the COVID-19 crisis. A DMO's main task is external communication and hence actions in the area of communication taken by the DMO are highlighted. From a practical perspective of the DMO, the biggest challenge is adopting strategic thinking, postponing the current activities, reacting immediately to be among the first, and developing new patterns of communication.

The chapter concludes that the collaboration between public and private organisations, joint communication, and marketing activities as well as digitalisation are essential for responding effectively to the COVID-19 crisis.

4.1 INTRODUCTION

The tourism industry regularly deals with crises (Pennington-Gray, 2018). Emerging crises are characterised by “time constraints, limited control and high uncertainty” (Burnett, 1998). They are seen as challenges that significantly disturb the daily operations, tourists' journeys and the destination's image (Avraham, 2015; Ritchie et al., 2004; Zhai, Zhong & Luo, 2019). The sudden appearance of an pandemic like COVID-19 in 2019 puts the DMO in the spotlight, which is often under pressure to develop appropriate strategies.

Until now, scholars have not agreed on a definition of crisis management (Carlsen & Liburd, 2008; Pforr & Hosie, 2008). According to Glaesser (2006), the common ground established thus far is not more than an agreement about the process.

Tourism strategies often refer to a destination's management and marketing (Stokes, 2008). The key question is 'how to use the destination's capabilities' or 'how to build a posture' with sufficient flexibility to be successful in a highly competitive and often unstable environment (Mintzberg et al., 2003; Stokes, 2008). According to Mintzberg et al. (2003), strategy includes "both, plans for the future and patterns from the past". In this sense, to apply tourism strategies to recover from the current COVID-19 crisis past events must also be analysed to determine which efforts have been taken, to learn from mistakes and understand which actions have been successful.

Tourism is a key sector and contributes considerably to the Swiss economy. In 2016, around 165,675 people were working full time in the tourism industry (OECD, 2018) while in 2018 employment in the sector had grown to 181,700, corresponding to 4.4% of total employment (Bundesamt für Statistik, 2018a).

As shown in Table 7, the tourism sector recorded continuous growth in tourist arrivals all over Switzerland (Bundesamt für Statistik, 2018b). The latest data (for 2018) show 55.4 million overnight stays in total, of which the main market is Switzerland itself by way of domestic tourism with 28.6 million overnight stays (Bundesamt für Statistik, 2018b). This means more than half the tourist arrivals (51.6%) are Swiss citizens (Bundesamt für Statistik, 2019; Schweizer Tourismus-Verband, 2017).

4.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN SWITZERLAND

There is no general crisis management plan for a destination to overcome the consequences of such an event. The goal is hence to mitigate the effects and implement policies to boost the recovery (Scott, Laws & Prideaux, 2007).

Crisis management is defined by Santana (2004) "as an ongoing integrated and comprehensive effort that organizations effectively put into place in an attempt to first and foremost understand and prevent crisis, and to effectively manage those that occur, taking into account in every step of their planning and training activities, the interest of their stakeholders" (p. 308).

When analysing the past events like the global economic crisis of 2008, the results show a downturn in tourist arrivals. Papatheodorou, Rosselló and Xiao (2010) came to the following conclusions: tourists will be more likely to travel to a domestic destination, with this phenomenon also called "a staycation" (p. 44); thus, domestic tourism is expected to boom. Purposes like visiting friends and relatives, repeat visitors and independent travellers are expected to be more resilient; the length of a stay, as well as the international tourism expenditure, will decline. In this sense, strategies must build on collaboration, regional cooperation to recover from the crisis; whereas to re-establish in- and outbound tourism, strategies should move towards clean, green and sustainable tourism (Papatheodorou, Rossello & Xiao, 2010).

Swiss tourism was affected very rapidly by the COVID-19 crisis. Minister for Health Dr Alain Berset stressed there was no obligation to remain at home, but that was the responsibility of each citizen (Forster, 2020). Foreign Minister Dr. med. Ignazio Cassis mentioned in an interview with the Neue Züricher Zeitung news agency that it was necessary to find a balance to fight the epidemic effectively. As may be seen from its neighbouring countries, the partial economic closure led to an increase in the unemployment rate, which in ‘rich Switzerland’ can be softened for a while (Gafafer, 2020).

The Swiss Federal Council has adopted a wide-ranging package of actions to reduce the economic consequences, avoid redundancies, maintain employment, safeguard wages and provide support for the self-employed (Staatssekretariat für Wirtschaft SECO, 2020).

Switzerland Tourism released the marketing campaign “dream now – travel later” at its webpage myswitzerland.com. It was an immediate response to the crisis, available in 14 languages (TravelNews, 2020). Another event promoted by the DMO Zermatt is the Light Art project, currently illuminating the Matterhorn as “a sign of hope and solidarity in the COVID-19 crisis” (Zermatt Matterhorn, 2020).

4.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS IN SWITZERLAND

Table 5: Basic indicators for Switzerland

Indicator	Switzerland
Area in km ²	41,285 (Bundesamt für Statistik, 2018c)
Population (number)	8,554,527 (Bundesamt für Statistik, 2018d)
Registered unemployment rate (%)	4.7 (Bundesamt für Statistik, 2018a)
Tourism arrivals in 2018 (number)	11.7 million (UNWTO, 2019)
Tourism arrivals growth 2017/2018 (%)	5.2 (UNWTO, 2019)
Nights spent 2018 (number)	55.4 million (Bundesamt für Statistik, 2018b)
Nights spent growth 2017/2018 (%)	2.0 (Bundesamt für Statistik, 2018b)

Source: Indicated in the table.

4.3.1 SWOT analysis for Switzerland in light of the COVID-19 crisis

To analyse the challenges facing tourism, a SWOT analysis was conducted based on an internal and external perspective. The internal analysis focuses on the strengths and weaknesses of Swiss tourism whereas the opportunities and risks are then identified as challenges in a mostly external view. Switzerland can take advantage of its strengths such as nature-based tourism and the power of its domestic market to overcome the crisis in the short term and to use these opportunities over the long term.

Figure 5: SWOT analysis for Switzerland

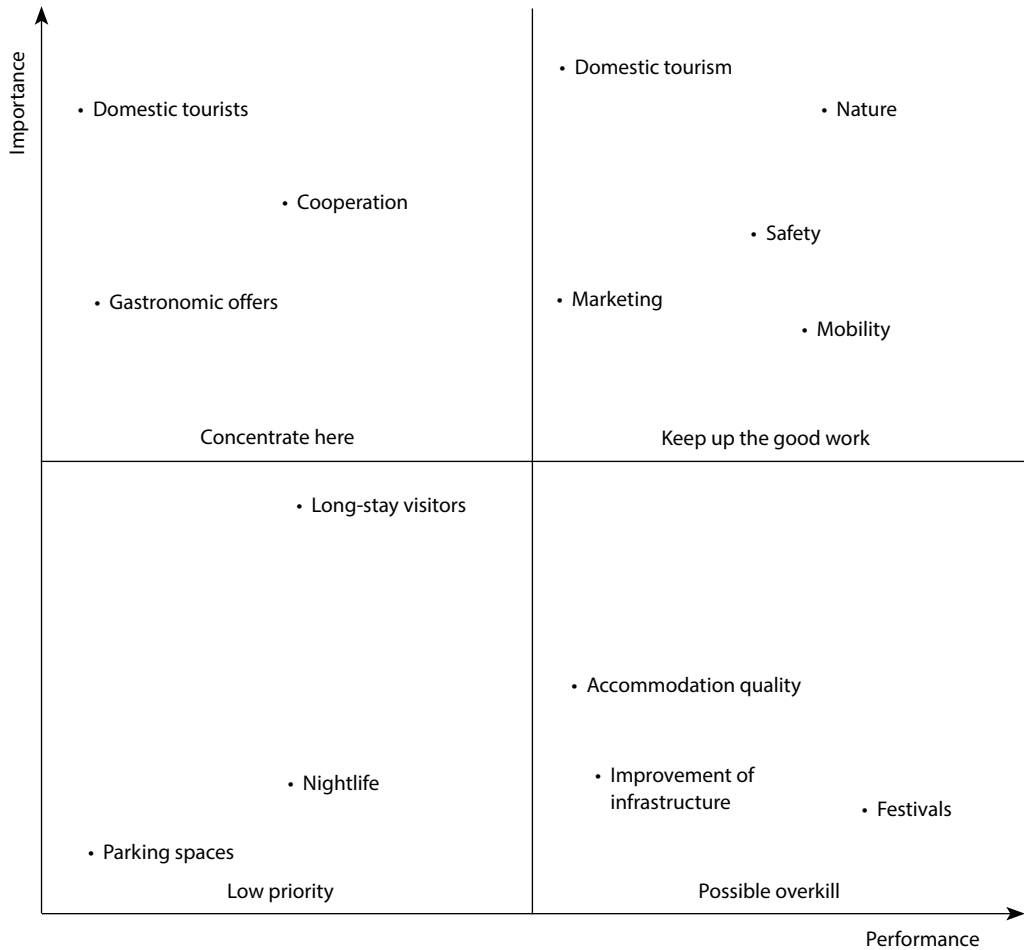
Strengths	Weaknesses
<ul style="list-style-type: none"> › technological advances › safe due to a low crime rate › effective public transport system › high quality infrastructures (hospitals) › high quality of life › no complete lockdown › high hygienic standards › financial securities 	<ul style="list-style-type: none"> › seasonality › capacity utilisation fluctuations › weak profitability of the hotel sector and mountain railways › SMEs with succession issues › famous for mega sport events like the Ski World Cup
Opportunities	Threats
<ul style="list-style-type: none"> › orientation to quality › potential for cooperation › increasing awareness of sustainability › digitalisation › rising prosperity › changing the behaviour of the visitors › climate change makes the summer tourism more attractive 	<ul style="list-style-type: none"> › falling price competitiveness › shortage of managers and skilled workers › dependence on foreign (major) investors › decreased demand from guests from the euro area › scepticism regarding cooperation › increasing international competition among destinations

Sources: Staatssekretariat für Wirtschaft SECO (2017); Universität Bern CRED-T (2018); Own work.

4.3.2 Importance-performance analysis for Switzerland during the COVID-19 crisis

Importance-performance analysis (IPA) is a tool used for examining customer satisfaction as well as management strategies. In this sense, IPA can help tourism stakeholders find out about deficiencies and set priorities for tourism developments. As a result, the more efficient allocation of resources can be achieved along with an increase in a destination's competitiveness (Sever, 2015).

Figure 6: Importance-performance analysis for Switzerland



Source: Own work.

4.4 EMPIRICAL RESEARCH

To address the identified research gap, interviews were conducted with two DMOs in Switzerland. The interview questions were answered by email and thus no oral interviews were conducted. The two organisations participating in the project were the DMO Switzerland “Schweiz Tourismus” on the country level and the DMO Lucerne “Luzern Tourismus AG” on the regional level.

4.4.1 Results and implications

Based on the central elements of the federal government's tourism policy plan, various measures have been derived and adapted to the situation during and after the COVID-19 crisis (Staatssekretariat für Wirtschaft SECO, 2017).

Policy 1: Promote Entrepreneurship

The first policy is to support and enhance national collaboration. Through more intense collaboration, especially with nationally based companies, the information flow and development insights can be enhanced. Sheldon and Dwyer (2010) stressed that after the financial crisis in 2008 the tourism industry needed information upon which to make decisions and respond effectively. Being the premier receiver of information brings the advantage of a faster reaction and raising awareness. Besides the rapid release of information, there must be consistency while communicating (Universität Bern CRED-T, 2018).

The second policy is to foster regional development through public sector-private sector cooperation. An interview with manager of the DMO of Lucerne (personal communication, 5 April 2020) emphasised that government, economy and citizens must work together to overcome the COVID-19 crisis. The DMO is the linking element and promoting stay-at-home-tourism (Schweizer Tourismus, 2020). As stated in the interview with the destination manager of Lucerne (personal communication, 5 April 2020), joint marketing and communication activities were considered as the crisis was emerging. These sought to continue to establish a homogenous image, strengthen the market presence and foster regional development. Moreover, digitalisation was to be part of their daily operations.

In order to measure the actions, it is suggested that surveys among stakeholders and visitor surveys be carried out to measure the perception and efficiency of the crisis communication.

Policy 2: Improve the strategic framework and underlying conditions

As addressed in the SWOT analysis, the current employment market is lacking skilled employees and managers (Destination manager of Schweizer Tourismus, personal communication, 2 April 2020). During the crisis, the unemployment rate directly related to tourism was 6% in the canton of Lucerne, appreciably higher than the average unemployment rate (Destination manager of Lucerne, personal communication, 5 April 2020). To support the economy and soften the crisis' consequences, public funds are indispensable. The first step towards a more attractive employment market is to guarantee salaries in times of crisis, as is done through public money as explained earlier. In the following phase, it is important to implement realistic safeguards for employees, especially those working directly with customers. Another point is flexible working structures; many cannot perform their usual work, yet the crisis' consequences require more staff for new activities. Accordingly, new positions will develop.

Policy 3: Use the upcoming opportunities in digitalisation

Digitalisation is becoming ever more important for businesses and must be directly included in their daily operations. The destination manager of Lucerne (personal communication, 5 April 2020) stated that during the crisis digitalisation has played an important role because all operations have taken place online, through emails and online conferences. The DMO could communicate with the external stakeholders through its webpage, social media platforms and emails, such as online marketing campaigns, online news and social media posts.

The policy gives a boost to projects related to the digitalisation of internal procedures and interacting with customers through social media platforms.

Policy 4: Strengthen the attractiveness of supply and its market presence

The market presence will be strengthened through a uniform appearance in themes. The corporate image leads to a stronger public perception. As concerns actions after the COVID-19 crisis, it is suggested to highlight 'security', 'safety' and 'transparency' as key elements to attract potential customers. The SWOT analysis shows that these elements are already strengths and thus facilitate the communication.

The second policy refers to the diversity in customer segments and target markets. In times of crisis this is an advantage because the destination does not rely on a specific type of customer. On the other hand, as the interviewee rightly noted, that is of little help should there be a second outbreak (Destination manager of Lucerne, personal communication, 5 April 2020). The findings suggest that, after the crisis, people will be more likely to travel to destinations not too far away from home. Therefore, the focus should be on the neighbouring countries as the target markets. Papatheodorou, Resselio and Xiao (2010) called this phenomena "staycation" (p. 44) while analysing travel behaviour after the economic crisis in 2008.

As noted, a holistic approach brings an advantage while managing a crisis. Flexibility and adaptability are required to effectively implement the elaborated actions while dealing with chaos and change. Moreover, collaborating with a wide range of stakeholders is essential for planning for and managing a crisis effectively. The DMO Switzerland should take the role of leader to provide direction for the whole tourism industry and bring the stakeholders together on a destination level to ensure integrated COVID-19 crisis management. In particular, spokespeople are needed to deal with the media and provide information to the external world (Ritchie, 2004).

Table 6: Policies suggested for Switzerland

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Joint Marketing Activities	Yes	Corporate marketing campaigns for Switzerland Increase external communication to businesses and tourists Act faster than the competitors Promote Safety, Security and Transparency	DMO Switzerland Regional DMO Tourism stakeholders	The number of press releases and interviews about the current status quo

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Re-establish tourism	Yes	Support businesses during the lockdown phase through Vouchers to avoid shortages	Swiss Federal Government Regional DMOs	Total amount spent on short-time working compensation Vouchers used
Strengthen market presence	No	DMO playing the role of leader Foster cooperation between public and private institutions	DMO	Qualitative measurements
Target markets and customer segments	No	Focus on domestic tourism Main target markets for city tourism: neighbouring countries Increase in nature activities (hiking, cycling, swimming) Special offers to target markets	DMO Private businesses	Changes in tourist arrival numbers The number of promotions
Digital leadership	No	Digitalise online procedures Home-office possibilities Online platforms for exchange and collaboration	Swiss Federal Government Private businesses	The number of services shifting from offline to online

Sources: Destination manager of Lucerne (personal communication, 5 April 2020); Destination manager Schweizer Tourismus (personal communication, 2 April 2020); Director of Italy and BeNeLux (personal communication, 1 April 2020).

4.4.2 Limitations

The study was conducted between 23 March and 7 April 2020, namely, during the peak time of the COVID-19 crisis' first wave in Europe. By the end of the project, nearly no scientific research had been published and thus the research was underlined with examples from past similar situations. The situation was also changing very quickly over 3 weeks and along with that the policies. Due to the situation changing and the limited amount of time, a detailed explanation was not always possible.

Two interviews (personal communication, April 2020) were conducted for the study, one with the DMO of Lucerne and other with the DMO of Switzerland. Due to the unusual situation, organisations were busier than normal. In this sense, oral interviews were not possible and written interviews were conducted. Further, it was too early to give specific, detailed information and statements about the situation and its progress.

It should be mentioned that the main focus is set on DMOs and thus only their view was included, despite the fact that in the policymaking process, in both theory and practice, different actors and stakeholder groups are involved.

The suggestions outlined in this chapter are based on the current tourism policy plan and possible actions were derived from it. Some actions should be implemented during the crisis and others afterwards. Nonetheless, not all of the suggested actions have a direct impact on the crisis itself or on tourism, but were included for the after-phase and the recovery as well as for the economic activities interlinked with the tourism industry.

4.5 CONCLUSION

This project provides the reader with an understanding of two main areas: crisis management and policy development in tourism by focusing on the role of the DMO.

The tourism policies of Switzerland are based on four pillars (policies and actions). The policies form part of the current tourism policy plan 2020–2022 and the actions are described in this chapter. Different actions derive from each policy, yet they are also interlinked and therefore one goal can depend on another. In order to manage tourism during the crisis, a collaborative approach is essential. The DMO of Lucerne (personal communication, 5 April 2020) emphasised that the government, economy and citizens must work together to overcome the COVID-19 crisis. Moreover, to re-establish tourism and foster regional development after the crisis such collaboration needs to continue. Stakeholders' satisfaction with the collaboration during the crisis and its improvement can be measured retrospectively.

As may be seen from the analysis, the reappraisal of the destination's crisis marketing and communication strategies should not simply be an internal process, but a process involving all stakeholders. This was also highlighted by the DMO of Lucerne (personal communication, 5 April 2020) when stating that joint communication and marketing activities were taking place. Therefore, it can be concluded that in the current times a consistent communication strategy is essential for keeping regular customers, potential visitors and stakeholders up to date.

Future research on crisis management is required, particularly with Switzerland as a practical example. Emerging research gaps are the impact and success of the marketing campaign "dream now- travel later", the satisfaction of stakeholders' collaboration and the economic, social and financial consequences of the COVID-19 crisis for Switzerland and its regions. Tourism researchers should also bridge the gap concerning the internal knowledge process and networks that foster or restrict the information flow. In this regard, organisational learning, double-loop-learning as well as the question of how the emerging knowledge can be used by DMOs are all relevant.

5 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN MACAO, CHINA

Yaozhi Zhang

ABSTRACT

Due to the COVID-19 pandemic, the global tourism industry has been experiencing a devastating crisis and recession. In this context, this chapter focuses on the Macao Special Administration Region in China while investigating how tourism destinations can formulate appropriate policies to mitigate the negative impacts of the current crisis. Combining desk-research entailing a literature review and an interview with a tourism researcher in Macao, this chapter provides insights for Macao and similar mass-tourism destinations to combat COVID-19. In particular, this chapter calls for dividing the tourism policymaking process into different stages and taking COVID-19 as the core referable indicator. Politicians and tourism policymakers must work collaboratively in the decision-making process. Besides, both swift managerial and promotional efforts as well as long-term fiscal support and plans that cover all tourism stakeholders must be devised and considered. In terms of research contribution, this chapter may help tourism researchers and practitioners better understand tourism policymaking during the global pandemic with reference to the world's gambling centre – Macao.

5.1 INTRODUCTION

This chapter concentrates on the tourism crisis at a destination level caused by unavoidable external forces. More specifically, it aims to deal with the current COVID-19 crisis that started at the beginning of 2020 in Wuhan, China and studies the tourism policymaking view with a view to gaining insightful knowledge to ease the negative impacts of COVID-19 on the tourism sector. The destination considered in this chapter is the Macao Special Administration Region (SAR) in China, a typical Asian mass-tourism destination with a strong focus on the gambling and gaming industry. During the COVID-19 crisis, Macao's tourism economy has been severely harmed by the enormous loss of international tourists and gamblers, making it urgent to investigate how Macao can combat this devastating crisis through relevant tourism policymaking.

To realise this research aim, the chapter first reviews and summarises previous literature in the field of tourism crisis management and pertaining policy-formulation in Macao and similar mass-tourism destinations. Combined with a situational analysis of Macao, this chapter proposes a series of policies that may help mitigate and improve the current conditions. To confirm the proposed policies and learn more about the actual situation and crisis management in Macao, an interview was conducted with a research staff member working in the local tourism educational institution in Macao. Facilitated by the interview (personal communication, 1 April 2020), the situation faced by Macao has been re-understood and relevant policies accordingly adjusted to adapt the existing

practice. As a result, seven specific policies are suggested for coping with the current crisis and after it ends, and relevant insights obtained from the interview regarding tourism crisis management amid the COVID-19 pandemic are drawn out and discussed as well.

5.2 CRISIS MANAGEMENT, TOURISM STRATEGIES, AND POLICIES FOR COPING WITH CRISES IN MACAO

Crisis management must always be based on a specific context and employs a case-by-case approach. Therefore, this section narrows the scope of crisis management by selecting Macao, a centrally managed mass-tourism destination, as the research subject. In recent decades, Macao has experienced several serious crises mainly including the 1997 Asian Financial Crisis (U & So, 2020), the 2003 SARS epidemic (McKercher & Chon, 2004), the 2008 World Financial Crisis (U & So, 2020), the 2012 anti-corruption campaign (Zhou, 2017) and the current COVID-19 pandemic crisis (Hammond, 2020). While other natural disasters like typhoons and floods can also affect Macao's tourism industry, they are comparatively temporary and only continue for days or weeks. Accordingly, financial and epidemic crises are the two most influential crises for tourism in Macao. Among all strategies to mitigate these two types of large-scale crisis, tourism policies emerge as the most influential and decisive methods. In Macao, the Macao Government Tourism Office (MGTO) is the official DMO responsible for implementing, analysing, and assisting in the formulating of tourism policies (Macao Government Tourism Office, 2019).

In times of crisis, according to Gu et al. (2013) the aim of tourism policies in a mass-tourism destination like Macao is to ensure the public benefit and interests are protected with tourism suffering the least sacrifice (Anastasiadou, 2008) since in many cases the government, tourism sectors and general public hold consistent interests (Dredge, 2006). The planning stage has been ignored by tourism crisis management in Macao for a long time. Regarding this, Chan (2011) constructed a financial engineering model to monitor the key financial performance indicators, including the four main stock market indexes, to predict Macao's entertainment revenue. Chan found they are significantly and positively co-related and the tourism crisis was lagging about 2 months behind the financial crisis (Chan, 2011).

During the crisis phase, policymaking will be tightly linked to the ongoing and consistent tourism recovery and restoration. Unlike long-term tourism policies focused on marketing and sustainable tourism development, during a crisis short-term and temporary tourism policies or regulations are more likely to be implemented for a destination like Macao, such as public warnings, the prohibition of tourism business, governmental financial support, tax reductions and refunds and so on (Laws, Prideaux & Chon, 2007). Most public policymaking must be oriented to the community's needs and interests (Liu, Tzeng & Lee, 2012); however, during a crisis the public sector tends to face difficulties of limited time, high emergency, and a paradox of interests. This means priorities have to be set according to the interests of the majority and key parts, leading to a challengeable tourism policymaking process (Laws, Prideaux & Chon, 2007). The core strategies in this phase are to manage the changing financial resources, tourism infrastructure, equipment and human resources (Ritchie & Jiang, 2019). Therefore, the tourism offering, patterns of operation, target market, market communication and public relations, financial and human resources, (small

business resilience and so on must be rethought and restructured to adapt the crisis (Möller, Wang & Nguyen, 2018; Ritchie & Jiang, 2019). Further, leadership is another critical issue in determining the process of directing and decision-making (Page et al., 2006). Thus, a special crisis task force needs to be established by the government to analyse, formulate, implement and monitor both proactive and reactive strategies (Moe & Pathranarakul, 2006).

In the post-crisis stage, Blackman and Ritchie (2008) recommend that, instead of just confirming the success, the DMO and task force should also question the existing practices through conversations with tourism stakeholders based on the concepts of double-loop learning (Lipshitz, 2000), doubting (Blackman, Connelly & Henderson, 2005) and Torres and Preskill's (2001) core processes of evaluative enquiry such that a learning organisation can be created to be better prepared for any later crisis.

5.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS IN MACAO

To create comprehensive tourism policies to cope with COVID-19, it is necessary to consider basic information about and the situation in Macao. As a brief introduction, Macao, previously a colony of Portugal and now the Special Administration Region (SAR) of P.R. China, is a mass-tourism destination heavily reliant on the tourism industry and especially gaming-related tourism. A similar destination in the world is Las Vegas in the USA. As a result, Macao's economy is expected to be extremely vulnerable to COVID-19. As shown in Table 7 below, before the outbreak of COVID-19, tourism performance was quite stable and steady with a low unemployment rate and increasing tourism revenue and arrivals. Although the tourism performance looks solid for the past year, it is also meaningful to look at more aspects of Macao's tourism by conducting SWOT and IPA analyses, as described below.

Table 7: Basic indicators for Macao

Indicator	Macao
Area in km ²	32.9
Population (number)	667,400
Registered unemployment rate (%)	1.9 (Feb 2020)
Tourism arrivals in 2019 (number)	39.4 million
Tourism arrivals growth 2019/2018 (%)	10.1
Nights spent 2019 (number)	41.0 million
Nights spent growth 2019/2018 (%)	0.8

Source: Macao Statistics and Census Service (2020)

5.3.1 SWOT analysis for Macao in light of the COVID-19 crisis

Prior studies conducted a SWOT analysis for Macao in different time periods (Koo & Koo, 2008; Wan, 2011). Based on the previous results and in light of the current pandemic crisis, Figure 7 below presents the SWOT analysis for Macao in the context of the COVID-19 crisis.

Figure 7: SWOT analysis for Macao

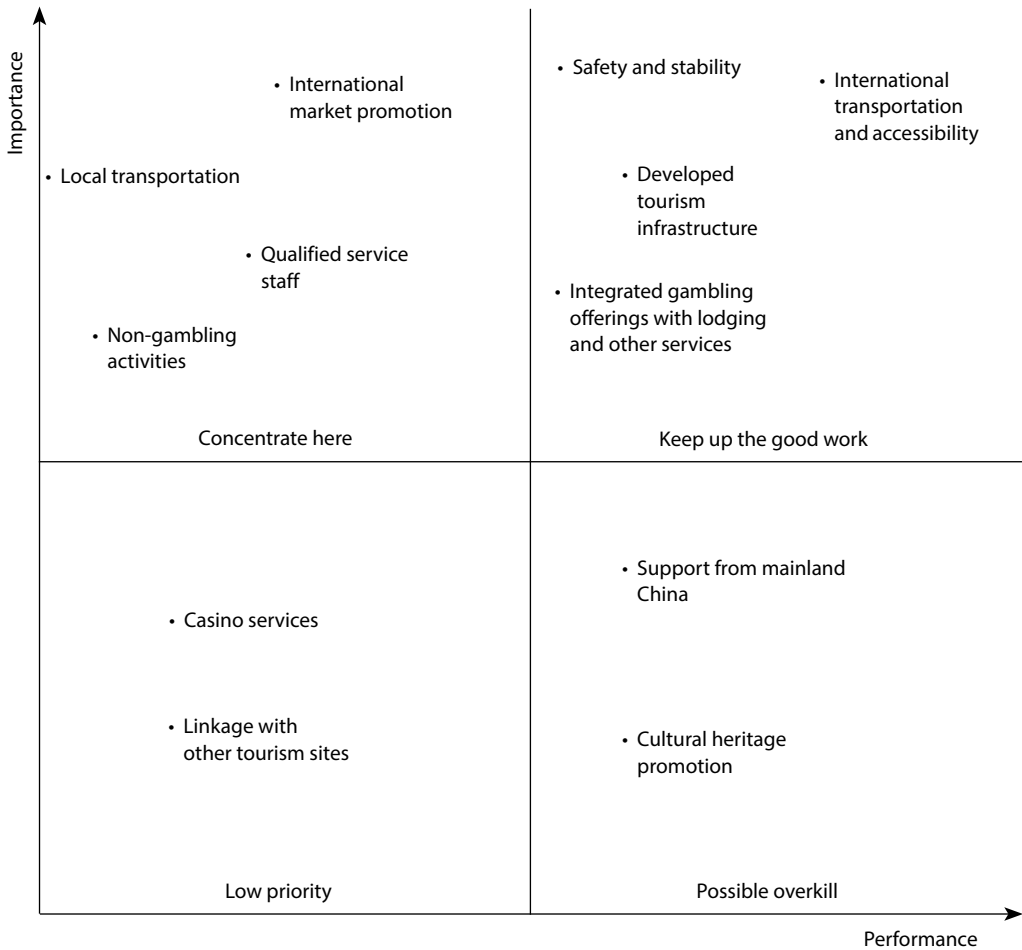
Strengths	Weaknesses
<ul style="list-style-type: none"> › Cantonese-Portuguese cultural heritage › Geographical convenience to mainland China › Stable order of society › Affluency of tourist attractions › Renowned destination image › Good relationship with the Chinese central government › Excellent international transport connection › High tax breaks for the tourism industry 	<ul style="list-style-type: none"> › Limited natural resources › Lack of land › Shortage of qualified local labour force › Overcrowding › High prices
Opportunities	Threats
<ul style="list-style-type: none"> › Macao's railway system › Mainland China supporting policies › UNESCO Creative City of Gastronomy 	<ul style="list-style-type: none"> › Over-dependence on gaming revenue › Increase in competitors in South Asia › Anti-corruption campaign in mainland China

Source: Own work

5.3.2 Importance-performance analysis for Macao during the COVID-19 crisis

To more specifically explore the present condition in Macao, IPA analysis (Figure 8) was also conducted, as shown below. The analysis was based on the author's knowledge and understanding of Macao.

Figure 8: Importance-performance analysis for Macao



Source: Own work.

5.4 EMPIRICAL RESEARCH

The empirical research was based on the six policies proposed during the desk research. Specifically, initial policies were created by the author and then included in the discussion part of the interview with an academic researcher at the Institute for Tourism Studies Macao (personal communication, 1 April 2020) along with other research questions. The section below first shows the proposed policies and interview results. At the end, the proposed policies are suggested based on the interview results.

5.4.1 Results and implications

Building on the literature review and analysis of the specific situation in Macao, the purpose of this section is to propose and explain the logic of certain policies that could be implemented in the current situation. Specifically, six policies emerge for use in the interview and the final suggested policies are revealed at the end (Table 8).

The six initial policies are: 1) Establishment of information centres and a task force; 2) Close all travel-related businesses for the safety of the community; 3) Direct financial aid; 4) Stimulate local tourism consumption; 5) Promote Macau's images of safety and security after the crisis; and 6) Mass-market promotion after the crisis. Based on the six policies above and other research questions, the interview was conducted and the results are revealed in sequences of the structured research questions (RQ1–RQ8) based on the interviewee's responses. It should be noted that the results are based on the interviewee's subjective options and do not represent the Macao government's standpoints.

First, as concerns Macao's strengths, the interviewee mentioned that the Macao government has sufficient cash flow to combat the crisis for months without incurring more debt (Academic researcher at the Institute for Tourism Studies Macao, personal communication, 1 April 2020). Further, previous experience of handling SARS and other crises have enabled Macao to rely on those mature practices that have proved to work well. Moreover, similar to other Asian countries and regions, the Macao government holds defined central power in the time of an emergency and its people are also willing to place the value of lives ahead of economic benefits. These strengths explain why Macao has been able to implement instant reactions to lock the city down and shut businesses. The current infection number and death toll reflects the success of the quarantine in Macao. Still, one weakness for Macao is completely related to its mono-industrial structure, namely its high dependence on inbound tourism (especially mainland China tourists) and gaming industries. In other words, its economy is basically equal to the gaming and entertainment economy. The shutting down of international travel and all casinos and hotels would definitely and drastically devastate Macao's economy and taxation in the short term. Regarding the threats, the interviewee said, "COVID-19 is the only and biggest threat for now, all other side-threats are derived from it and can be solved instantly as soon as the pandemic terminates". In this case, the interviewee perceived the current opportunities are actually very limited, only in relation to solving the virus as soon as possible. Some opportunities might at the moment be focusing on local consumers and increase local business and monetary circulation. Otherwise, many SMEs in Macao may go bankrupt at the end.

As for the policymaking-related issues, the interviewee explained the policymaking process for Macao and MGTO is very complicated. Specifically, during the crisis tourism policymakers have only followed the general policies introduced by the Macao government, the central government of China as well as the guidelines of the Chinese Centres for Disease Control and Prevention (CCDC). The role of tourism policymakers during the crisis is more like a facilitator and notifier instead of a decision-maker. There are several reasons for this phenomenon. Not only must all policies be approved by the central Macao government, but tourism policymakers do not possess

the knowledge to handle the disease-induced crisis. Therefore, the best way is to collaborate with the specialists in the public sectors to come up with a scientific and not an instinctive decision. Another opportunity may relate to the MICE industry, which is a high-margin example of new market segments for a destination undergoing crisis recovery.

According to the interviewee, as concerns the disease dimension, the shutting down of business and the halt imposed on international and domestic travel are the two most effective policies for containing the virus. For individuals, PPE requirements like masks and gloves and enforcing social distancing rules for local residents have to be strictly implemented. Tourism policymakers cannot assist too much on the virus level. On the economic level, more financial recovery policies and timelines were being discussed and would be set based on containment of the virus. She also mentioned that by 4 April more than 50 specific policies for COVID-19 had been designed by the Macao government. It was impossible to evaluate each of them, but continuing to monitor and modify them is greatly needed, she added.

The interviewee also went through the proposed policies; policy 1 had already been implemented but she agreed with policy 2 that the lockdown and shutdown should be maintained for a few months. As to the issue of quarantine, she proposed the use of small local hotels as the venue to reach a win-win condition for both business and government. Regarding the financial aid policy (Policy 3), the interviewee perceived it is better to divide it into tax reduction and tourism subsidy, as different government departments are responsible for them. She agreed strongly with policy 4 and thought policies 5 and 6 could be conducted together. Further, she proposed another policy of promoting the MICE industry, as she had mentioned before. Based on her comments and proposals, the relevant policies were modified are found in the Appendix.

As for the influential factors in Macao's tourism policymaking, she mentioned that academia always wants the answer that they are conducting strategic stakeholder management and to collaborate with them, but in a time of crisis it is totally impractical for Macao as basically all influential stakeholders' interests are opposed to the shutdown and lockdown. Here, the strongest factor to be considered during the crisis is based on science and truth, as well as government leadership. However, when life goes back to normal the stakeholders, including gaming corporations, local business, residents etc., will be required to participate in the recovery policymaking process to collaboratively design the marketing policies together with members of parliament. As a conclusion, the interviewee prefers cooperation during the post-crisis time instead of at the peak of the crisis.

Despite the discussion on specific tourism policies, the interview results interestingly suggest a huge gap between the theories and actual practice. It shows that political and socio-cultural factors can play more significant roles during a crisis. Further, the role of tourism or any business may not be prioritised due to containment of the disease. Especially when the pandemic crisis is considerable, the decision power is most likely in the Centres for Disease Control (CDC) rather than the DMO and commerce sectors. Policymaking and stakeholder collaboration in tourism are more related to the post-crisis stage and recovery stage. In addition, strong actions are preferred during a time of crisis in Asian culture and the actual results have somehow proven the effectiveness of the

strategies implemented. This implies that tourism policymaking should be based on a destination's socio-political context and the policymaking process varies greatly in terms of different types of crises.

Table 8: Policies suggested for Macao

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Long-term shutdown of the tourism business	Yes	Avoid gatherings Reduce lost business Contain COVID-19	Macao government Macao Public Security Police Force Hospitality operators	Length of the shutdown Coverage of the shutdown Intensity of the shutdown
Requisition of hotels as temporary hospitals	In progress	Back-up plan for excess patient numbers Increase hotels' revenue Decrease the cost for government	Macao Public Security Police Force Public hospitals Hospitality operators	The number of hotels needed The selection of hotels
Tax reduction	In progress	Offset the financial pressure on relevant stakeholders suffering the broader impacts of COVID-19	Macao Financial Service Bureau	The volume of tax reduction The targets of tax reduction
Tourism subsidies	In progress	Offset the financial pressure on business suffering during the crisis Provide support for SMEs	Macao Government Tourism Office Macao Financial Service Bureau	The volume of subsidies The targets of subsidies
Stimulation of local consumption	No	Help local SME businesses Increase local financial circulation	Macao Government Tourism Office Participating local businesses	Timeline of the recovery Revenue of local businesses
Macao image and market promotion campaign	No	Build tourists' confidence Increase the destination's image	Macao Government Tourism Office	Budget for the promotional campaign Marketing the 4 Ps
Promoting MICE sectors in Macao	No	Increase the scale of business	Macao Government Tourism Office	MICE revenue Number of MICE visitors

Source: Academic researcher at the Institute for Tourism Studies Macao (personal communication, 1 April 2020)

5.4.2 Limitations

With regard to the limitations and future studies, it is first noted that the sample size of one interviewee for the empirical part of this project is far from enough to ensure high-validity results. Namely, it is necessary to collect much more data if valuable and comprehensive insights are to be gained. Second, the data analysis method adopted in this chapter is simple qualitative content analysis without a rigorous coding and encoding process, which also does not support the high reliability of the results. It is suggested to conduct a deductive or mixed thematic analysis for this type of research and include at least two coders during the data analysis period by providing inter-coder reliability indicators. Further, it should be noticed that although the DMO specialises in the tourism policymaking process, as a public sector it is faced with political pressure. Therefore, it is necessary to always include several types of tourism stakeholder rather than just DMO managers or workers. Last but not least, it is noted that the COVID-19 situation is still evolving and hence this chapter only suggests several policies based on the current conditions and forecast. Given that the policymaking process is an ongoing one based on the pandemic's trajectory, the findings should be updated accordingly as the crisis develops.

5.5 CONCLUSION

This project has reviewed relevant studies and theories in relation to destination crisis management and especially the present COVID-19 crisis in the destination of Macao. Several insightful conclusions emerged during the research process.

First, it is concluded that the most important response to the current outbreak is strong outbreak-control measures. Based on this, the tourism policymaking department or the DMO should act within the guidelines of the government and the CDC. Further, strong and enforceable policies are more necessary than flexible and ambiguous policies. The shutdown and lockdown are seen as necessary for handling the COVID-19 crisis. Second, although tourism development must give way for safety and people's lives, in the long run tourism is an indispensable driving force of the economic recovery and development. Financial aid is the most direct and effective measure to help the tourism industry overcome this difficult period.

As the crisis enters its recovery phase, policies should aim to help local businesses by taking advantage of the number of domestic visitors and local purchasing power. Marketing recovery strategies were well planned during the crisis and implemented as soon as the pandemic was contained. In contrast to the epidemic control stage, policy formulation during the recovery stage must consider the stakeholders' specific needs and support large-scale intergovernmental and tourist destination cooperation with a view to the tourism industry recovering quickly in a short time.

6 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN ABU DHABI, UNITED ARAB EMIRATES

Chaekyung Park

ABSTRACT

The contribution of tourism in contemporary society to both developed and developing countries is so significant that any downturns in the industry's activity may be a cause for concern. At many destinations, tourism-related policymakers have encountered the dilemma of how they should respond to an unexpected downturn in tourism demand caused by different types of crises. In particular, the current COVID-19 outbreak is a vivid example of a global tourism crisis and presents the tourism sector with developing challenges. International travel restrictions and the full or partial closure of businesses and industries in Asia, Europe, and North America have led to the collapse of global travel. In this critical situation, this chapter aims to investigate how tourism strategic planning and policy creation perform in the real world, and to analyse the current opportunities and challenges encountered by Abu Dhabi as a selected tourist destination. Abu Dhabi is the capital city of the United Arab Emirates and the tourism sector of Abu Dhabi contributed AED 164.7 billion (38 billion EUR), or 11.1%, to the UAE's GDP in 2018 (WTTC, 2019c). This fact can be interpreted as meaning the COVID-19 crisis has had a considerable negative impact on the economy of the UAE and appropriate responses to the crisis must thus be addressed urgently. For the purposes of this chapter, part of the literature review outlines and discusses a strategic and holistic approach to crisis management and policy development for the tourism industry in times of crisis at an international and a destination level. Further, a qualitative semi-constructed interview conducted in the empirical research demonstrates how Visit Abu Dhabi comes in response to the perceived impending global crisis and the COVID-19 pandemic's effect on Abu Dhabi's tourism sector. Specifically, the result of the interview examines the process of a crisis management plan for the present and future and the goals of tourism strategies and the creation of adequate policies pursued by Visit Abu Dhabi. Two important messages emerge from this chapter: although crises cannot be stopped, their impacts can be limited by the collaboration of the main tourism stakeholders while a proactive integrated approach to tourism policies and strategies is essential for destinations to be prepared for any crisis in the future without adversely damaging their image as a place to visit.

6.1 INTRODUCTION

In many countries, governments have promoted their tourism industry since it plays a powerful role in enriching the nation's business activity, infrastructure, income, and job creation. However, the tourism sector seems to be highly vulnerable to negative environmental factors such as pandemics, natural disasters, social conflicts, wars, economic crises, and terrorist attacks. Since there is always a crisis somewhere in the world (Mansfield, 1999; Sonmez, Apostolopoulos & Tarlow, 1999), the industry appears to face an almost permanent threat and uncertainty. Such unexpected catastrophes influence international tourism demand (Dimanche & Lepetic, 1999) and negatively

impact tourism stakeholders like hotels, restaurants, airlines, travel agencies, municipalities, and local communities. In particular, tourism demand is highly sensitive to security and public health issues (Blake & Sinclair, 2003). While reflecting on the current situation, the World Travel & Tourism Council warned that the COVID-19 pandemic could put up to 50 million jobs in the global tourism sector at risk, with travel likely to slump by a quarter this year, with Asia being the most affected continent and, even when the outbreak is over, it could take up to 10 months for the industry to recover (WTTC, 2020b). Considering this, governments and destinations must recognise the significance of the downturn in tourism and acknowledge the need for a prompt and adequate policy response (Blake & Sinclair, 2003) to the COVID-19 pandemic, which has taken a sudden and unexpected long-term downturn. In this chapter, it is germane to briefly review why the COVID-19 pandemic was identified as a major issue in Abu Dhabi worthy of more detailed analysis and evaluation. Moreover, it should be stressed that at the time of writing this chapter the global spread of COVID-19 was occurring at such speed that its geographical distribution was changing weekly and events are certain to overtake some of the empirical data given in this chapter.

6.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN ABU DHABI

A crisis can be defined as “any action or failure to act that interferes with an organisation’s ongoing functions, the acceptable attainment of its objectives, its viability or survival, or that has a detrimental personal effect as perceived by the majority of its employees, clients or constituents” (Faulkner, 2001). This definition makes it clear that any type of global health crises can place the survival of the travel and tourism sector at risk. Given the sensitivity of the tourism industry and its high dependence on perceptions of safety, Gurtner (2005) points out that “the prospective remuneration on effective crisis management has made it a topical issue amongst relevant authorities and stakeholders”. Accordingly, it can be argued that one of the public sector’s key tasks in a strategic policymaking context is to undertake a leadership role to prepare contingency and crisis plans so that the stakeholders in a destination can have clear guidelines to follow, given the chaos, complexity and challenges brought to destinations when crises suddenly arise (Page et al., 2006). Such an integrated approach is vital for the public sector to coordinate and manage the diverse range of tourism actors that coexist in any destination for the sustainability and financial viability of the destination’s tourism industry.

Particularly when making tourism policy in times of crisis, it is intriguing to note that policymakers can face three major issues (Blake & Sinclair, 2003) that must be considered due to their strong correlations with a downturn in any tourism economic activity. According to Blake and Sinclair (2003), the first question is to determine whether the downturn is sufficiently large to merit offsetting measures. The second issue to consider is the length of the downturn. If an economic shock is expected to be long-lasting or even permanent, policymakers should focus on mitigating the adjustment costs. The third point to consider is the policy selection for implementation. Here, policymakers must weigh up the relative merits of various responses and consider the most cost-effective policies for stimulating revenue and reducing the adjustment costs. Based on these, it can be asserted that an adequate tourism policy, one designed to mitigate the economic damage and facilitate the recovery during and after a crisis, must meet the following criteria: (1) help to

contain the damage brought by the crisis; (2) coincide with international development goals; (3) be prompt; (4) be responsive to local economic needs; (5) ensure livelihoods are maintained; and (6) consider the short- and long-term dynamics of the recovery (Stephens, 2017).

In order to reflect on the present COVID-19 crisis and review how the above theories regarding crisis management and tourism policymaking are applied to real-world situations, this section focuses on the global financial crisis that heavily affected the tourism sector of Abu Dhabi between 2008 and 2009.

Abu Dhabi's economy is one of the world's fastest-growing economies, and tourism is one of the primary sectors contributing to Abu Dhabi's economic development (Abu Dhabi Council for Economic Development, 2008). Since Abu Dhabi's tourism sector is significantly intertwined with the global economy, it is vulnerable to exogenous shocks. This means the effect of the previous global financial crisis on Abu Dhabi's tourism industry was considerable (Shalendra, 2010). Due to the economic downturn following the crisis, domestic demand for tourist goods fell as people concentrated on saving money by reducing their leisure spending, while the number of international visitors also decreased drastically (Nyarko, 2011). Moreover, due to high construction costs, the supply of new hotel rooms dropped. As a result, the majority of hotels suffered losses. Further, in order to stay profitable, most businesses in the tourism industry had to reduce their workforce.

Given these economic impacts of the reduced tourism revenues, the policymakers for the Abu Dhabi tourism sector aimed to increase the number of visitors to 2.7 million annually by 2012 (Abu Dhabi Council for Economic Development, 2008) so that tourism stakeholders could recover from the crisis promptly. To achieve this goal, the government pledged to increase financial aid and public investment to develop and promote its tourism sector. One of its main strategies was for Abu Dhabi to become a hub for culture in the Middle East and to attract the high-end luxury travel market. The government has put a substantial amount of thought and energy into making Abu Dhabi a unique destination (EME Outlook, n.d.). To overcome the negative impacts of the global financial crisis on its economy, the government took the leadership role and an integrated approach by actively taking inspiration from abroad and collaborating with various stakeholders across borders and industries. For example, Abu Dhabi and France began discussing a 30-year cultural agreement to establish the Louvre Abu Dhabi Museum in the Saadiyat Island Cultural District (Paris City Vision, n.d.). The subsequent agreement allowed the Musée du Louvre and other major French museums to provide long-term loans from their collections to Abu Dhabi so that the number of tourists to Abu Dhabi would grow gradually. Further, the Formula 1 Etihad Airways Abu Dhabi Grand Prix was staged in November 2009 on Yas Island in Abu Dhabi, becoming another project to have successfully increased awareness of Abu Dhabi as a destination within the global tourism industry, drew international crowds, put Abu Dhabi on the global sporting map. Strategies and projects such as these reflect Abu Dhabi's efforts to use tourism as a means to recover from the global financial crisis, generate new opportunities and ultimately lift Abu Dhabi's international standing as a tourism destination.

Despite the crisis, overall it is found that the tourism sector of Abu Dhabi continued to expand at a rapid pace and accelerated its growth especially in the 2010–2011 period (Hassan & El-Maghraby, 2011). Abu Dhabi's tourism sector remained resilient and even pushed forward by increasing hotel room capacity. This expansion was fuelled not only by the increased airline competition following the crisis but also by implementing adequate tourism policies and strategies, which led to lower air ticket prices to Abu Dhabi. As a result, it is revealed that the tourism industry was one of the few industries in Abu Dhabi to have managed to recover completely from the 2008–2009 global financial crisis by coinciding with international development goals, being prompt, being responsive to local economic needs, and considering the short- and long-term dynamics of the recovery.

6.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS IN ABU DHABI

As mentioned in the previous section, the tourism sector plays an important role in driving economic development to Abu Dhabi. In particular, Abu Dhabi has become a centre for world-class sporting events like the Abu Dhabi Golf Championship, the prestigious Abu Dhabi Desert Challenge cross-country rally, and the Formula 1 Abu Dhabi Grand Prix. Besides, the city offers the world's largest concentration of premier cultural institutions which will include the Sheikh Zayed National Museum, the Guggenheim Abu Dhabi, and Louvre Abu Dhabi to target family leisure tourists. The World Travel & Tourism Council (WTTC) calculated that Abu Dhabi was the fastest-growing tourist destination in the Middle East in the last 10 years. According to the WTTC, the average nominal growth of gross value added for tourism reached 12.8% between 2006 and 2016, lifting the GDP share of the tourism industry to 2.7%. Tourism's direct contribution to headline GDP will remain at 2.7% in Abu Dhabi by 2026, according to the WTTC. This suggests the sector will develop at about the same rate as GDP. Specifically, tourist arrivals and nights spent in Abu Dhabi are continually increasing year over year. Abu Dhabi's overall strategic objective has been to increase the number of visitors to the emirate incrementally each year as part of the drive to increase the tourism sector's contribution to non-oil GDP by 2021 (Abu Dhabi Chamber, 2018).

Table 9: Basic indicators for Abu Dhabi

Indicator	Abu Dhabi
Area in km ²	972
Population (number)	2.9 million
Registered unemployment rate (%)	2.58
Tourism arrivals in 2019 (number)	10.27 million
Tourism arrivals growth 2019/2018 (%)	10.5
Nights spent 2019 (number)	13 million
Nights spent growth 2019/2018 (%)	5

Sources: Abu Dhabi Chamber (2018); Zaatari (2020)

Despite its great potential for a further expansion of the tourism sector of Abu Dhabi, Abu Dhabi temporarily stopped issuing tourist visas after 17 March 2020 as a strategy to contain COVID-19 (ARAB News, 2020). In addition, the municipality announced plans to close its main tourist attractions, theme parks and cultural destinations from 15 March 2020 and suspended sea cruises, desert camps, safaris and floating restaurants as a precautionary measure to limit large gatherings in response to COVID-19 (Rai, 2020). The Department of Culture and Tourism of Abu Dhabi revealed it would monitor tour operators to ensure the ban is implemented, and impose penalties on those not complying with Abu Dhabi's strategies and policies (ARAB News, 2020).

6.3.1 SWOT analysis for Abu Dhabi in light of the COVID-19 crisis

In the setting of the COVID-19 crisis, the strengths, weaknesses, opportunities and threats of Abu Dhabi as a tourist destination are analysed as follows.

Figure 9: SWOT analysis for Abu Dhabi

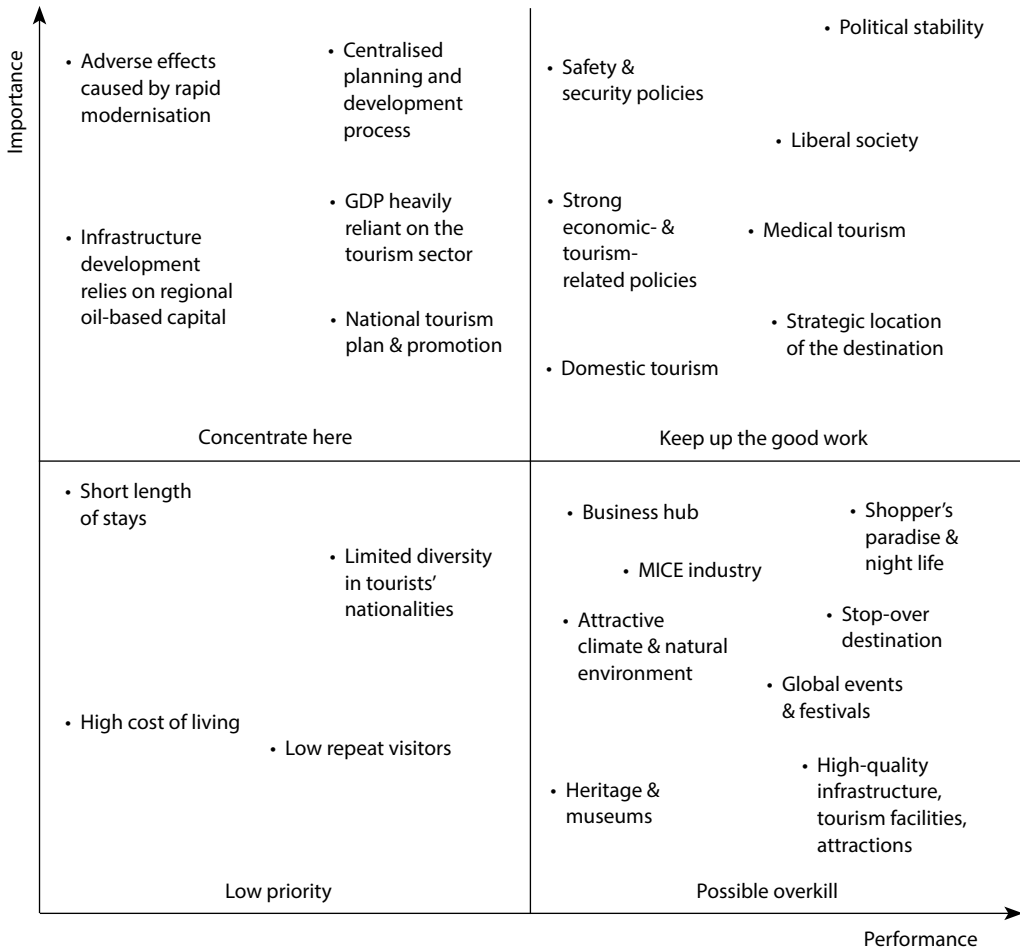
Strengths	Weaknesses
<ul style="list-style-type: none"> › The destination's strategic location › Political stability › Safety & security policies › Strong economic- and tourism-related policies/strategies › A relatively liberal society › Attractive climate throughout the year › Impressive nature (e.g. desert landscape, ocean, islands...) › High-quality infrastructure, tourism facilities and famous attractions which can attract different types of tourists (e.g. family, couple, business...) › A perfect stop-over destination › Worldwide recognition as a shopping destination & nightlife › Variety of global events and festivals › A business hub › Heritage & museums › Well-established MICE industry 	<ul style="list-style-type: none"> › High cost of living › Short length of stays › Low repeat visitors › Ineffective promotion and lack of national tourism plan by the UAE government as a whole (each emirate is responsible for its own promotion) › Tourism planning is centred on high-quality tourist experiences and visitor needs rather than the welfare of those being visited › Centralised planning and development process (top-down approach) › Majority of tourists from nearby locations in the middle-east region › Heavy reliance on the tourism sector (11.1% of the UAE's GDP in 2018) › Infrastructural development remains dependent on regional oil-based capital › Rapid modernisation, which can create adverse effects for the local society
Opportunities	Threats
<ul style="list-style-type: none"> › Attract medical tourism (e.g. quarantine hotels, accommodations for frontline workers in healthcare industry) › Attract domestic clients (e.g. local vacation, staycation...) › Collaboration with other industries to create better tourism policies (technology, healthcare, finance, science, environmental authorities...) › Devise a sustainable tourism development plan for the future › Address pollution and reduce the excessive pressure on nature reserves › Tackle the issues regarding rising rents in real estate/accommodations › Improve hygiene and security policies/strategies › Influence the destination's image (e.g. branding campaign "stay home, stay safe, stay curious) for potential tourists 	<ul style="list-style-type: none"> › Expected critical economic recession as UAE's GDP heavily depends on the tourism sector › Loss of millions due to travel cancellations › Massive declines in tourist traffic › Delay in events & festivals (e.g. Expo 2020 Dubai) › Closures of accommodations (hotels & apartments), restaurants, shopping centres, tourist attractions › Flights halted (e.g. major national airlines – Emirates, Etihad) › Suspend the public transport service › Cruise ships arrival/departure suspended › Bankruptcy of various tourism entities (travel agencies, tour operators, destination management companies) › Increase in the unemployment rate

Source: Own work

6.3.2 Importance-performance analysis for Abu Dhabi during the COVID-19 crisis

In this section, the characteristics of the Abu Dhabi tourism sector are analysed by applying the importance-performance analysis (IPA) method. Through this approach, high priority can be assigned to the elements tourists are unsatisfied with but view as very important especially during the COVID-19 crisis.

Figure 10: Importance-performance analysis for Abu Dhabi



Source: Own work

6.4 EMPIRICAL RESEARCH

The present chapter is an exploratory qualitative study based on a semi-constructed interview. The following section describes the purpose, goals, research questions, method and results of this chapter. The interview was conducted with a destination manager of Visit Abu Dhabi in April 2020 and aimed at enquiring into how Visit Abu Dhabi is a response to the perceived impending global crisis and the COVID-19 pandemic's effect on Abu Dhabi's tourism sector. Moreover, the result of the interview examines the process of crisis management planning and the goals of the tourism strategies and creation of adequate policies pursued by Visit Abu Dhabi.

6.4.1 Results and implications

Pandemics are ever more common due to globalisation and climate change in modern society. They are not standardised; thus, a creative policy that fits the unique needs of those hardest hit must be designed and implemented according to the particular situation. Policy creation should not be limited to healthcare; however, it must include economic policy (Stephens, 2017). Understanding the economics of a pandemic can lead to future policy that can mitigate some of the negative economic impacts. Based on the conducted semi-structured interview (Destination Manager of Visit Abu Dhabi, personal communication, 2 April 2020), the research questions in this chapter are answered below. In addition, the corresponding policies, goals, responsible institutions and indicators are identified with these adequate policies able to help improve crisis preparedness, management and recovery in the destination.

In the case of the tourism sector of Abu Dhabi, various strengths and weakness were discovered with respect to coping with the COVID-19 crisis. Abu Dhabi is strong in political stability, safety & security policies, strong economic- and tourism-related policies/strategies, and a well-established customer relationship management (CRM) system. On the other side, the UAE government generally relies heavily on the tourism sector, the ineffective promotion and lack of a national tourism plan by the UAE government as a whole as each emirate is required to promote its own region by itself. During the COVID-19 crisis, Abu Dhabi is faced with potential opportunities and threats. Although newly confirmed cases continue to expand, leading to extend the restrictions on everything within the city, Abu Dhabi can still seize the opportunities to improve the city's development in different areas including an online training system, telecommuting, a sustainable tourism strategy, and developing different industries rather than the tendency of relying heavily on the tourism sector.

Abu Dhabi's policymakers can address the multifaceted challenges and impacts in the destination's tourism sector caused by the COVID-19 crisis by commencing the closure of all air access, which is the biggest challenge Abu Dhabi is facing. For the time being, Abu Dhabi is focusing on increasing awareness about its destination contents, sending marketing materials worldwide, and strengthening its relationships with its international and domestic partners. It has worked on a recovery plan, which is ready to encourage Abu Dhabi's main markets visitors to return to our city once the travel restrictions ease. Usually, creating and implementing a new policy takes a long time. However, in this critical situation, decisions and actions have been established faster than

usual in Abu Dhabi, which is a very positive sign. There are various adequate policies for coping with the COVID-19 crisis currently in Abu Dhabi, namely: the National Disinfection Programme; the suspension of tourism and municipality fees for the tourism and entertainment sectors until the end of 2020; up to a 20% rebate on rentals for the restaurant, tourism and entertainment sectors; and the reduction from 7% to 3.5% of 'municipality fees' imposed on sales at hotels. Yet, there are still more policies to be implemented in Abu Dhabi during and after the COVID-19 crisis, such as: activation of the Emergency Operation Centre (during which time the Governor of Abu Dhabi sits next to the head of the tourism department of Abu Dhabi to make joint and rapidly actionable decisions), and the collection of departing foreigners' safety evaluations at the airports and revealing the results to foreign media.

When making tourism policies in Abu Dhabi, mostly the economic factors such tourism booking cancellations, the loss of business, cancellation of flights, closure of tourist attractions and hotels have been strongly influencing the process and decisions. Further, tourism stakeholders in Abu Dhabi are expected to cooperate during the COVID-19 pandemic and thereafter by creating an Action Network, made up of state and local leaders, including the media, to jointly identify and respond to shocks and address any issues relating to misinformation. In addition, by creating trust-based coalitions between key stakeholders ahead of a future crisis to respond in a coordinated and effective way when needed and to ultimately improve resilience. Further, Visit Abu Dhabi has taken a few actions to ensure effective cooperation during and after the crisis. One of the ideal examples is the creation of a taskforce for communicating with tourism stakeholders during the COVID-19 crisis. It aims to check how the pandemic has affected their business and which assistance can help to overcome this. Visit Abu Dhabi created guidelines to help the stakeholders overcome their losses and reduce the negative impacts. Moreover, Visit Abu Dhabi asks for actors' feedback so that their opinions can be considered while creating new policies.

The empirical research shows the Abu Dhabi government responded promptly to the economic shock brought by the COVID-19 crisis as it has already implemented a considerable number of strategic fiscal policies to support the tourism stakeholders. Still, there is still room for improvement. The UAE government is ineffective in promoting tourism and lacks a national tourism plan as each emirate needs to promote its own region by itself. There is also a lack of preparedness for such a global health crisis. Accordingly, it is suggested that the government actively engage with the private sector to improve crisis management, recovery plans and the online marketing campaign to increase brand awareness of Abu Dhabi in the international market. One example is the establishment of a Tourism Industry Emergency Response Group. This group would be composed of various representatives from tourism industry organisations and the government. Altogether, they could organise weekly or monthly meetings to create joint and actionable decisions and policies in response to the COVID-19 crisis as well as to prepare for any future outbreaks. More importantly, it must be considered that the implications of crises increasingly require the Abu Dhabi government to engage with the private sector to improve the crisis preparedness, management and recovery plans. Crisis preparedness must focus on building trust-based coalitions, assessing readiness, developing emergency action plans and enhancing education. Effective management of a crisis requires the rapid activation of emergency plans as well as quick, accurate and transparent communication. Finally, responsiveness to ensure a

speedy recovery should emphasise transparency, readiness and confidence; inviting the world back when ready, enticing travellers to return, building on one's travel segments and rebuilding infrastructure strategically and smartly after the crisis has ended.

Table 10: Policies suggested for Abu Dhabi

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Suspension of tourism and municipality fees for the tourism and entertainment sectors until the end of 2020	Yes	To financially support tourism stakeholders	Ministry of Finance	The number of tourism stakeholders supported
Up to a 20% rebate on rentals for the restaurant, tourism and entertainment sectors	Yes	To financially support tourism stakeholders	Ministry of Finance	The number of tourism stakeholders supported
Reduction from 7% to 3.5% of the 'municipality fees' imposed on sales at hotels	Yes	To financially support tourism stakeholders	Ministry of Finance	The number of tourism stakeholders supported
A freeze on the 'fees' charged upon the sale of tickets, issuance of permits and other government fees related to entertainment and business events	Yes	To financially support tourism stakeholders	Ministry of Finance	The number of tourism stakeholders supported
A 10% reduction in water and electricity bills and a 10% reduction in deposits paid for water and electricity connections	Yes	To financially support tourism stakeholders	Ministry of Finance	The number of tourism stakeholders supported
Reduction in labour and other relevant charges	Yes	To reduce the cost of operating business and to financially support small business entities (e.g. reduction of work permit fees for businesses with 1–6 registered workers)	Ministry of Finance	The number of tourism stakeholders supported

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Extension of visitors' visa through any travel and tourism agency and mitigation of restrictions	Yes	To protect and support international visitors and tourists	Ministry of Foreign Affairs and International Cooperation	The number of international tourists being assisted
Closure of tourist attractions, museums, movie theatres and theme parks in the country to combat the coronavirus' spread	Yes	To contain the spread of COVID-19	Ministry of Health and Prevention	The number of newly confirmed cases of COVID-19
Recovery Plan (Global online marketing, communication with various partners and clients, strengthening partnerships)	Yes	To increase awareness of the destination and to sustain Abu Dhabi's position in the international tourism market. (e.g. launch a tourism online campaign on the English-language website for the official "Visit Abu Dhabi", which contains a large pop-up)	The Department of Culture and Tourism of Abu Dhabi	Growth of the tourism sector in %
Establishment of the Emergency Operation & Control Centre and the National Disinfection Programme	No	To make joint and rapidly actionable decisions in response to the crisis and to contain the virus' spread (e.g. COVID-19 24 Hour Toll-Free Number, Hand Sanitizer Distribution)	State Security Department of the United Arab Emirates, Ministry of Health and Prevention	The number of newly confirmed cases of COVID-19
Establishment of the Tourism Industry Emergency Response Group (TIER)	No	To develop plans for crisis scenarios, comprehensive preparedness as well as to manage the tourism industry's response to present/future crises (the group comprised representatives of the Tourism industry, industry organisations and government)	The Department of Culture and Tourism of Abu Dhabi	Growth of the tourism sector in %

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Collection of departing foreigners' safety evaluations at the airports and revealing the results to foreign media	No	To reassure international visitors and tourists	Ministry of Foreign Affairs and International Cooperation	Growth of the tourism sector in %
Facilitation of collaboration and communication with the travel trade and potential tourists	No	To help potential tourists feel safe and stay safe (e.g. compiled information through websites, brochures, safety guide and videos)	The Department of Culture and Tourism of Abu Dhabi	Growth of the tourism sector in %
Relaxation of the visa restrictions, waive the tourist visa fee for visitors, and increase the period of validity of one-off tourist visas	No	To facilitate travel after the COVID-19 crisis	Ministry of Foreign Affairs and International Cooperation	The number of international tourists being assisted

Source: Destination manager of Abu Dhabi (personal communication, 2 April 2020)

6.4.2 Limitations

The empirical results reported herein should be considered in terms of some limitations. First, there was a limitation on the sample pool when conducting the one-on-one interview. The size of the sample pool was limited to just one organisation (Visit Abu Dhabi) by the researcher's time available for the data-gathering and for scheduling interviews. Due to the lack of interviewees, it was difficult to find significant relationships and meanings among the final collected data. This could lead to issues such as an unrepresentative sample and questions concerning the reliability of the results and analysis. Second, the results of the qualitative research could not be verified. Qualitative research is open-ended; participants have more control over the content of the data collected. Hence, we were unable to verify the results objectively against the scenarios stated by the respondents. Third, there was limited access to data and relevant study findings due to the novelty of the COVID-19 crisis. When the empirical research was being conducted, stakeholders faced various critical challenges in the tourism industry and the pandemic crisis was putting their lives at risk. This made it difficult to gain appropriate/prompt responses from the market considering all the uncontrolled factors. Fourth, there was a considerable lack of clarity about the COVID-19 pandemic's impacts on the tourism and hospitality industry of Abu Dhabi due to the time constraints. Considering that the COVID-19 pandemic is still ongoing, it is suggested that future research explore different destinations' implemented policies and evaluations when it is over. Lastly, the findings of this chapter might not be transferable to other situations or future cases as a result of the unique characteristics of the selected destination and the type of its COVID-19 crisis.

6.5 CONCLUSION

Outbreaks have become the new normal; with outbreaks like H1N1 estimated to have had a global economic impact of between USD 45 and USD 55 billion (WTTC, 2019a). The recovery time from disease cases took 19.4 months on average, with the range for recovery extending from 10 months to 34.9 months (WTTC, 2019b). In fact, the media nowadays has been submerged with news of emerging diseases, epidemics and pandemics, including MERS, Ebola, SARS and COVID-19. The impacts of epidemics and pandemics on the global economy are set to increase due to globalisation (Pike et al., 2014). The pan global spread of this infectious disease has also threatened the health and welfare of tourists and gradually made them less motivated to travel. This means the need to understand the impacts of such outbreaks and to establish adequate policies to minimise the impacts is of primary importance (Pike et al., 2014; Busch et al., 2015). The increasing intricacy and interconnectedness of global events requires governments to work with the private sector to improve their preparedness to mitigate the impact of crises, their management to effectively address the crisis as well as enhance their responsiveness to ensure a speedy recovery. The Travel & Tourism sector has proven its resilience. Still, destinations and the private sector alike can learn from the experiences of others to minimise the possible impact of crises given that it is not a matter of if, but when the next crisis will happen. The biggest risk is often not the crisis itself, but the preparation, management and response. In light of this, it is essential for the public and private sectors to come together to ensure that smart policies and effective communication are in place to enable a more resilient travel sector. While the implementation of strategic recommendations and policies will improve the tourism industry's resilience, it is important for destinations to take a holistic approach to drive society's resilience more broadly; the building blocks of which are trust, collaboration, communication, openness, empathy, honesty and efficiency. To conclude, a government-driven approach is essential to foster effective coordination and collaboration amongst the relevant stakeholders at a particular destination (Pforr, 2006), and various destinations strategically concentrate on communication and information management in order to mitigate crises and influence tourist decision-making (Hall, 2002; Fall & Massey, 2006). This makes it pivotal to emphasise proactive strategies since it appears that post-crisis tourism is also always tourism in a pre-crisis. In addition, the impacts of pandemics on the tourism sector must be studied and managed from a multidisciplinary perspective in order to provide a more holistic understanding of them. It is likely that there are many unknown aspects of pandemics related to economics and other disciplines. Future research should include additional methodologies with the aim of discovering new information and creative solutions.

7 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LA PAZ, BOLIVIA

Dayana Rojas Mango

ABSTRACT

“The world faces an unprecedented global health emergency with an unparalleled impact on our societies and livelihoods” (UNWTO, 2020c). The tourism industry is facing the unprecedented challenge of the severe acute respiratory syndrome COVID-19 (SARS-CoV-2). Travel and Tourism are among the sectors most affected by the crisis and are currently experiencing some of the greatest impacts of the coronavirus disease outbreak, with effects on both supply and demand regarding travel having a visible massive impact on the sector, which around the world is radically altering all tourism industry strategies for development. This calls for support and recovery measures for the tourism sector given the millions of jobs at risk. The travel and tourism sector is committed to supporting all measures taken to curb the outbreak and mitigate the impact on people’s lives, yet this requires urgent support and specific mitigation measures.

This chapter offers an aid package to assist in the recovery and reactivation of the tourism activity in the city of La Paz-Bolivia in the shape of a strategic action plan proposing a series of tourism policies to help re-establish tourist activity, sustain jobs and, more importantly, to ensure in the aftermath of the present sanitary crisis that La Paz city can fully recover as a tourist destination in the global market.

7.1 INTRODUCTION

By observing that our environment appears to have become increasingly challenging, significant measures are needed to support the travel and tourism sector in the turbulent months ahead, which is related to the urgent need for the public sector to develop and implement policies to support the sector through measures that protect workers’ livelihoods and the tourism business in the city of La Paz.

After reflecting on the role of tourism in modern society and presenting extensive research of information about the crisis in tourism, including the current crisis, notably how tourism crisis events have been managed, the chapter proposes improvements to the responses of the Municipal Agency for Promoting Tourism in La Paz, by way of customised measures needed to deal with the present COVID-19 crisis in the destination, with the aim of overcoming the associated difficulties and significant impacts that tourism in La Paz will have to deal with, while considering all affected actors and making an effort to involve them through actions reflected in policies that will alleviate the effect that COVID-19 will hold for them.

Good crisis management is partly about organisations' ability to learn from the experience of others as well as their own (Laws, Prideaux & Chon, 2007) and partly about the ability and willingness of a lead organisation to undertake the roles of researching and then disseminating the information required for effectively addressing the crisis. Therefore, producing an assistance strategy may help in coping with the widespread crisis and its impacts on tourism activity but, at the same time, it could be used as a guideline while planning a future response in the case of any contingency in the destination. However, as well as negative outcomes, crises and disasters also have potentially positive results such as giving a stimulus to innovation, or the recognition of new markets.

7.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN LA PAZ

A crisis is a serious event that may have many (natural, political, financial, technical) causes; a crisis in tourism is an event of serious magnitude that disrupts the sector's orderly operation. Whatever the cause, it is widely expected that after the appropriate steps have been taken the situation will return to normal, with the various people and organisations resuming their previous ways of working together.

Policymaking *inter alia* entails assessing impacts and creating tourism strategies and plans to cover all impacted actors and similarly to forecast future crisis scenarios. Moreover, planning through them in this way makes it possible to see the real importance of developing tourism policies as negotiations that can cope with crises in tourism situational analysis and trend analysis in the selected destination.

"The city of La Paz was founded on October 20th, 1548 under the name of La Ciudad de Nuestra Senora de La Paz (The City of Our Lady of Peace). La Paz is the administrative capital of Bolivia. La Paz was established in 1542 and is located in the Andes mountains. The altitude of the city ranges from about 4058 metres (13,313 feet) above sea level and in the city of El Alto (where the airport is located) to 3100 metres (10,170 feet) in the lower residential area. It is the highest national capital in the world" (BoliviaTravelSite, 2019).

The city of La Paz is considered to be a young destination since the city it is still working on its image as a tourist destination, and thus in history the city has not faced previous crises given its young age as a destination. This means the present COVID-19 crisis has become an important milestone for the city as a destination, with its impacts putting La Paz in a new position of rethinking the path the city would like to take so as to transform to become the destination that is planned.

7.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR LA PAZ

La Paz is set in a canyon created by the Choqueyapu River, which runs northwest to southeast and is surrounded by the high mountains of the Altiplano. The city's main thoroughfare, which roughly follows the river, changes names over its length, but the central tree-lined section running through the downtown core is called the Prado. La Paz has geographically (in particular, altitude) been privileged by its topographical characteristics and, by being surrounded by high mountains,

offers stunning unique views to all visitors who call it the “City of Heaven” due to its high altitude and lofty peaks. As described in the world-renowned Lonely Planet guide »The city seems to reinvent itself at every turn – a jaw-dropping subway in the sky brings you from the heights of the city El Alto to the depths of Zona Sur in the blink of an eye« (Lonely Planet, 2019).

Before 2014, tourism was not consolidated as an economic activity; the sector itself was not given the support actually needed from the public sector; further, the activity was not being developed formally since no tourism office nor a consolidated destination management organisation had been established, neither had projects been created to develop the sector; namely, no efforts to reinforce the city as a tourist destination. “The situation changed on December 7, 2014, due an important milestone in the history of our city is registered, through a global citizen vote – promoted by the organisation Seven Wonders Foundation – La Paz is recognised as one of the seven wonder cities of the world” (Municipal Agency for Promoting Tourism in La Paz, 2016). This recognition has given rise to a new scenario for the city. Benefitting from this achievement, tourism is becoming a privileged sector in thinking about a series of opportunities for municipal management. This planning process has won recognition because the value of building a metropolitan strategy for La Paz allows the city to access several opportunities previously hard to achieve, highlighting tourism as one of the sectors benefitting the most from this recognition that has started to look at the city from a new perspective. This perspective aspires not only to make the city the ‘Gateway to Bolivia’ but to become an international tourist destination. This has required looking at this opportunity in a comprehensive way: not only assuming the demanding requirements of the international tourism market, but also responding responsibly to the demands of the internal market.

Table 11: Basic indicators for La Paz

Indicator	La Paz
Area in km ²	472
Population (number)	2.706 million
Registered unemployment rate (%)	4.27
Tourism arrivals in 2019 (number)	988,263
Tourism arrivals growth 2019/2018 (%)	8.8
Nights spent 2019 (number)	260.398
Nights spent growth 2019/2018 (%)	No data available

Source: Instituto Nacional de Estadística, Bolivia (n.d.)

The above table shows that La Paz city as a destination does not engage in mass tourism as in 2019 it had 988,263 visitors in total, which is not a significant number for the city. On the other hand, as also revealed in the table there has been growth in visitor numbers with 8.8% of annual tourism arrivals registered, meaning a potential increase in nights spent to more than 3 nights per tourist, bringing more income for the city as a destination.

7.3.1 SWOT analysis for La Paz in light of the COVID-19 crisis

La Paz City has made important changes in its efforts to consolidate the city as a tourist destination since La Paz was declared to be a “Wonder City of the World”; based on this new recognition the La Paz government established a discussion panel for all tourism stakeholders involved in the city of La Paz. Called the “Metropolitan Tourism Encounter”, this important event led to important decisions in the sector and demonstrated some of the city’s opportunities and threats, as displayed in the following situational SWOT analysis of the activity where the identified elements may support and lead to a quick recovery from COVID-19:

Figure 11: SWOT analysis for La Paz

Strengths	Weaknesses
<ul style="list-style-type: none"> › Altitude (3,600 m a.s.l.), the highest capital in the world › Unique geography (set in a canyon (a bowl-like depression surrounded by high mountains) › Rich gastronomic diversity › Rich in cultural resources 	<ul style="list-style-type: none"> › Low budgets (insufficient to develop more projects) › Low quality service › Poor tourism image as a world destination (low competitiveness as a destination) › Low sustainability awareness › Low support from the government (legal, financial)
Opportunities	Threats
<ul style="list-style-type: none"> › Becoming a downhill/adventure destination › Becoming a high-mountain climbing destination › Becoming an urban destination › Becoming a cultural destination › Becoming a gastronomic destination 	<ul style="list-style-type: none"> › Frequent social conflicts › Lack of government support for developing tourism › High political instability › The existing COVID-19 crisis (lowering the numbers; the hard recovery)

Source: Director of the Municipal Agency for Promoting Tourism in La Paz (personal communication, 2 April 2020)

All of the stakeholders invited to this discussion panel agreed the biggest strength is La Paz’s topographical feature as its altitude (3,600 m a.s.l.) has seen the city being declared the ‘highest city in the world’. The stakeholders plan to potentiate this unique feature in the tourism market as well as the rest of its mixed opportunities so as to become an adventure, urban, cultural and gastronomic international destination. As the Director of the La Paz DMO stated, “La Paz currently doesn’t have a specific type of tendency in tourism, now the city is known as a gateway for travelling to different parts of the country but, once the tourists arrive, they will find out that they have a lot of activities and attractions to see”. This shows they are working to improve La Paz’s image to increase the number of visitors. Still, a number of tasks and projects need to be assigned in coordination with the stakeholders to achieve this goal.

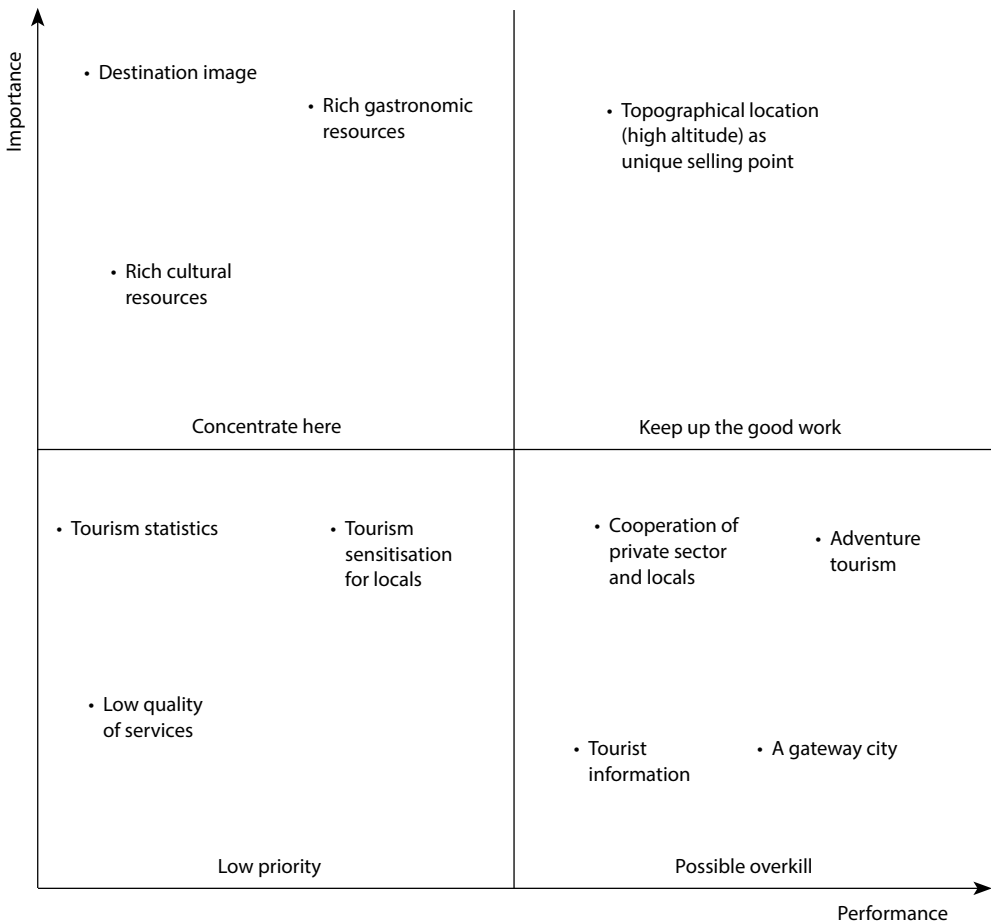
On the other hand, they expect to have greater support from the central government with more economic resources and, more importantly, to achieve political stability that is able to reduce the social conflicts that constitute some of the biggest threats and significantly reducing the tourist

numbers every year. Yet, they have not deeply analysed the huge impact of the current crisis for the sector given that the DMO is in possession of quantitative reports on the pandemic's impact on the destination.

7.3.2 Importance-performance analysis for La Paz during the COVID-19 crisis

In this section, importance-performance analysis (IPA) is the method used to show the characteristics of the city's tourism sector; the information presented is taken from the interview with the Director of Tourism of La Paz City (personal communication, 2 April 2020). In addition, the information provided has been classified with a view to analysing aspects of the city that could be improved or the opportunities held by the city deserving more attention to aid the city in recovering faster from the sanitary crisis of COVID-19.

Figure 12: Importance-performance analysis for La Paz



Source: Director of the Municipal Agency for Promoting Tourism in La Paz (personal communication, 2 April 2020); own work.

7.4 EMPIRICAL RESEARCH

The empirical research was based on policies proposed by the author according to the information obtained. The section below first shows the proposed policies and the results of the interview (personal communication, 2 April 2020) with the Director of the Municipal Agency for Promoting Tourism in La Paz. At the end, the policies according to the interview results were presented to the head of this institution.

7.4.1 Results and implications

This chapter entails a practical application of tourism policymaking in the current crisis brought by COVID-19. This study has examined at first hand the way the private and public sectors in tourism can be expected to behave, with the research showing the sector within the activity to have been most impacted is tour operators, which now face their greatest challenge thus far, while on the other hand the organisation responsible for managing the destination has found itself in the difficult position of having to be a reactivation leader, the entity responsible for such role, to be aware of its main task to »get normal or get better« as a destination based on its strengths and opportunities, come up with different actions and to aid the recovery from the crisis and, in the same way, to propose new strategies as part of a recovery action plan for the destination.

La Paz City has revealed growing tourism potential where its geographical and cultural features are highlighted as opportunities to work on and consolidate to make the destination strong. In this chapter, an attempt is made to help ease the impacts the city as a destination is facing and will face and thus different experiences are studied with the goal of suggesting better policies able to respond to the tourist reality in La Paz. While creating policies, efforts were made to develop an individual action plan that was offered to all stakeholders to also indicate their participation in all of them, given the importance of collaboration among them. Noting the crisis' impact on each of them, the main goal was to minimise their effects yet also to view this challenging period as a learning experience to engage in internal analysis and set new horizons and new goals while choosing the right methods to accomplish to those goals. The La Paz Municipal Agency for Promoting Tourism will continue its efforts to reach its previous targets, but also in combination with the efforts to deal with the present crisis. In addition, the Agency may appreciate the need to create an emergency action plan, as described in the table below in the shape of policies the destination could work on with respect to a future crisis in order to prevent larger impacts and losses for the sector, in turn accelerating its recovery and preparations for the future.

Table 12: Policies suggested for La Paz

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Reducing layoffs of tour operator employees in La Paz city	No	To obtain financial support from the state government for tour operators through salary subsidies to support jobs of workers in tourism as the most vulnerable actors during and after the COVID-19 crisis	Municipal Agency for Promoting Tourism in La Paz The government	The number of registered tour operators in La Paz city The share of tour operator employees' salaries covered by subsidies
Reduction or temporary suspension of tributary taxes for tourism businesses in La Paz city	No	To contribute to the economic recovery of tourism businesses in the destination after the COVID-19 crisis	Municipal Agency for Promoting Tourism in La Paz Tax Administration Service	The number of registered tourism businesses in La Paz City The percentage tax reduction (0) for a tourism business in 1 year The number of domestic travellers
Marketing the destination to the local market	No	Promote the city of La Paz as a potential destination through: -virtual tours to attract domestic travellers - digital campaigns through social media promoting the city's tourist attractions - improving the destination image of La Paz, potentiating its main and unique attributes »The highest capital city in the world«	Municipal Agency for Promoting Tourism in La Paz	Economic growth (in percent)

7 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LA PAZ, BOLIVIA

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Create strategic alliances and partnerships between neighbouring DMOs and tourism businesses	No	Reinforce the quality of the performance as a tourist destination Support the circular economy Expand La Paz city's promotion as a tourist destination Increase the number of visitors	Municipal Agency for Promoting Tourism in La Paz	The number of alliances between the DMO of La Paz and the neighbouring destinations The number of partnerships between tourism businesses at La Paz and between nearby destinations The number of national/international tourists Economic growth (in percent)
Creation of a hygiene regulation for tourism service providers	No	Improve the tourism image of La Paz city in the global market as a »Safe city Destination « Improve the quality service of tourism businesses in La Paz city	Municipal Agency for Promoting Tourism in La Paz	The number of national/international tourists
Diversification of the tourist offer of La Paz city in the global market	No	Consolidation of the city's placement in the market of new rural/nature tourism products Support rural regions under the jurisdiction of La Paz to develop new community-based tourism Increase the number of visitors	Municipal Agency for Promoting Tourism in La Paz	The share of overnight stays The number of national/international tourists Economic growth (in percent)

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Promote fair arrangements for consumers	No	Collaboration with tourism businesses through counselling meetings for promoting flexible arrangements with their consumers (rescheduling cancelled services; offering discount vouchers with long validity) Increase the number of visitors	Municipal Agency for Promoting Tourism in La Paz Tourism business representatives	The number of national/ international tourists Economic growth (in percent)

Source: Director of the Municipal Agency for Promoting Tourism in La Paz (personal communication, 2 April 2020).

7.4.2 Limitations

Close observation of the management strategies at the Municipal Agency for Promoting Tourism in La Paz reveals some of the Agency's limitations. Since this organisation depends financially on municipal resources, the reach of action of this unit is very limited, meaning that the decrease in financial resources from tourism leaves development of the activity on the bottom of the priorities for the city's growth. Still, it is continuing with these efforts by showing the tourism sector's importance through the number of arrivals and tourism revenues as positive indicators and all of the benefits they bring to the city in order to ensure greater recognition and participation from the government, and thereby acquiring more funds for its future actions. Another limitation the Agency faces is the social political instability causing frequent social conflicts and being responsible for the significant reduction of visitors given the destination's poor perceived image.

It is observed that this young destination is eager to increase its visitor numbers yet is ignoring sustainability concepts that must be considered at the time of planning.

The limitation of this research means it is impossible to point to sustainable tourism development policies given that all of the presented measures are merely suggested as a potential guide that could be followed to help the city recover as a tourist destination; it is entirely the Agency's own decision to take or those measures or not and perhaps to develop more tools to deal with the coming effects in the aftermath of COVID-19.

7.5 CONCLUSION

Tourism has a structural strength whereby travel forms part of modern lifestyles and, when possible threats to people go away, it is able to resurface quickly (Laws, Prideaux & Chon, 2007). Tourism has become an important activity over history with resilience having developed as a quality; after numerous crisis that have challenged their surviving capacity, destinations must learn from the experiences of other destinations to best deal with the present crisis whose effects are now becoming visible.

Organisations must develop a crisis management and preparedness plan in order to minimise the negative impacts of a crisis or disaster. A well-developed and integrated management plan is vital for tourism to survive during a crisis with minimal impacts on visitors, businesses and locals and will enable organisations to react quickly and effectively should a crisis occur. In acting effectively, organisations must be aware of public brand management and internal management while working with the industry and community as a whole to minimise or alleviate the impact of a crisis or disaster.

La Paz City is a good example of this learning process given its short existence as a tourist destination still recovering from the recent socio-political crisis in November 2019 and also when the COVID-19 crisis arrived in the city in 2020, considerably impacting the sector and pointing to the evident gap concerning the nonexistence of developing tourism policies for the sector, the information emerging from the literature review and the interview with the Director of the Municipal Agency for Promoting Tourism in La Paz that shows no official measure is currently being taken to reduce the impacts of the crisis both today and in the future, given that the Agency is still waiting for the crisis to finish before deciding to use quantitative reports on the sector and the losses it has incurred.

Based upon the collected information, a set of recovery measures was proposed in the shape of policies that could become part of the recovery strategy of La Paz city. The purpose of these measures is to cope with the COVID-19 crisis with a stress on using their strong qualities and to use them to create a combination of tourism policies with a view to reducing the damage and impacts at the destination and to ensure the quick recovery of the tourism sector; namely, returning to 'normal', which is the main objective after experiencing such a crisis, and also to learn from the 'hard times' being experienced as a destination, while also being aware of the things that have been doing well, what might be changed and what stakeholders would like the destination to become. Finally, these measures will help in establishing an emergency plan and actions in the event of a future crisis and, in turn, may assist in tourism returning to normal or improving and becoming a destination that better meets the interests of locals and tourists alike.

8 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LILLEHAMMER, NORWAY

Ximena Alejandra Rojas Sierra

ABSTRACT

The coronavirus (COVID-19) crisis has seriously disrupted the tourism sector due to the cessation of activities and the tough travel and transport restrictions. This chapter presents a literature review on crisis management and tourism policymaking, with the intention to later analyse Lillehammer as a tourism destination during the COVID-19 pandemic through empirical research. The results reveal the policies and processes the Destination Management Organisation (DMO) had to lead in response to the crisis. Tourism policymaking takes place in a dynamic environment where the priority is the financial liquidity of businesses. The findings show the COVID-19 crisis must be treated with a strategic approach whose main objective is to reconstruct the tourism product. This strategy is guided by a number of policies that aim for a safe environment for visitors and financial assistance for tourism businesses. At the end, crisis management is a continuous learning process that requires a feedback loop to understand the relationship between the strategy and the ever-changing environment.

8.1 INTRODUCTION

Policy development may be understood as a social process of communication between stakeholders, where negotiations and decisions are shaped by the environment's conditions (Stevenson, Airey & Miller, 2008). When in crises, tourism policymaking takes place in a rapidly changing and dynamic environment, making the decision-making process even more complex (Monterrubio, 2010). The following sections would develop more on how crises affect the tourism sphere and how policymaking supports destinations to better understand this process. The analysis focuses on Lillehammer, a tourism destination located in the Norwegian region of Oppland, and known for having hosted the Winter Olympics in 1994.

In recent years, the global tourism sector has been showing a growth rate for international arrivals of 5,500% between 1950 and 2018 (WTTC, 2019b), with a record 1.5 trillion in 2019 (OECD, 2020a). The picture for the long-term period was continued growth; however, the coronavirus (COVID-19) pandemic shocked the global economy by halting activities and transport. Restrictions on access and national lockdowns triggered an economic crisis, especially for the tourism sector, which contributes 10.4% of global GDP, supporting one in every ten jobs (WTTC, 2019b). Thus, crisis management strategies are needed to mitigate the crisis' impacts. Along this line of thinking, tourism's strategic policy development is crucial when trying to reduce the impact of a crisis and its effect on the economy.

Overall, this chapter aims to understand how tourism strategic planning and policymaking have happened in the midst of the COVID-19 crisis for the destination under study. With the help of empirical research, existing and potential policies will be evaluated for a better understanding of their feasibility and adaptability for coping with the crisis.

8.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN LILLEHAMMER

Lillehammer's location is suitable for winter sports and outdoor summer activities like rafting and trekking (Tourist Information Centre Lillehammer, 2020). Flagestad and Hope (2001) state that winter sports destinations are standstill markets and pose challenges regarding environmentally sensitive mountainous areas and villages. The author proposes sustained value creation as a goal of the strategic performance of this kind of destination.

According to the OECD (2020a), the Norwegian government emphasises sustainability in its current tourism strategy. The government has developed this strategy with agricultural resources as its basis, stressing the unique food experiences. Further, it has created the Sustainable Destination certification scheme, which guides destination management and seeks to develop sustainable and profitable tourism in Norway.

Prior to the COVID-19 crisis, the Norwegian government and parliament provided for the following national policy priorities while developing Norwegian tourism: 1) establishing good framework conditions for business practices; 2) developing a sustainable tourism sector; 3) increasing cooperation between stakeholders; 4) promoting Norway as a tourism destination; 5) increasing knowledge and expertise in the tourism sector; and 6) improving accessibility to increase competitiveness (OECD, 2020a). This scheme of policies shows the destination's strategic view of developing Lillehammer in a sustainable way even while wishing to promote and be competitive.

Later, the government responded to the COVID-19 crisis by implementing measures to stop the contagion in the destination. These measures involve the cancellation of cultural and sports events and closure/restricted use of hospitality industry establishments like restaurants, bars, pubs and nightclubs. It is suggested on the destination's website to avoid leisure travel and journeys that are not strictly necessary. Besides, they inform that Norway's borders are closed to incoming non-resident travellers (Tourist Information Centre Lillehammer, 2020). The section below presents an overview of Lillehammer as a tourism destination, that is later followed by empirical research.

8.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR LILLEHAMMER

The ISSN's (2018) study reports that even when the country shows strong growth in foreign visitors, most tourists are Norwegians. This study revealed that 93% of all commercial overnight stays are made by Norwegians and Europeans. Regarding nights spent, this study shows 53% of all foreign holiday accommodation is in hotels, while 36% is at campsites, youth/family hostels, Hurtigruten or cabins/rooms/apartments rented by private owners. The table below presents basic indicators concerning the destination being considered.

Table 13: Basic indicators for Lillehammer, Norway

Indicator	Lillehammer, Norway
Area in km ²	477
Population (number)	28,345
Registered unemployment rate (%)	3.6
Tourism arrivals in 2019 (number)	530,289
Tourism arrivals growth 2019/2018 (%)	3.74
Nights spent 2019 (number)	1,083,470
Nights spent growth 2019/2018 (%)	-1.18

Sources: AdminStat Norvegia (2019), Census and Economic Information Center (2020), Statistics Norway (n.d.a), Statistics Norway (n.d.b)

8.3.1 SWOT analysis for Lillehammer in light of the COVID-19 crisis

In relation to the COVID-19 crisis, the strengths, weaknesses, opportunities and threats of Lillehammer as a tourism destination were analysed in the above table. Destinations share the same threats globally, yet Lillehammer can use its strengths like nature-based tourism and the power of its domestic market to thrive during the crisis. As noted by the Tourism Destination Manager (personal communication, 2 April 2020), nature-based tourism could be a good alternative for tourists looking for less crowded destinations.

Figure 13: SWOT analysis for Lillehammer

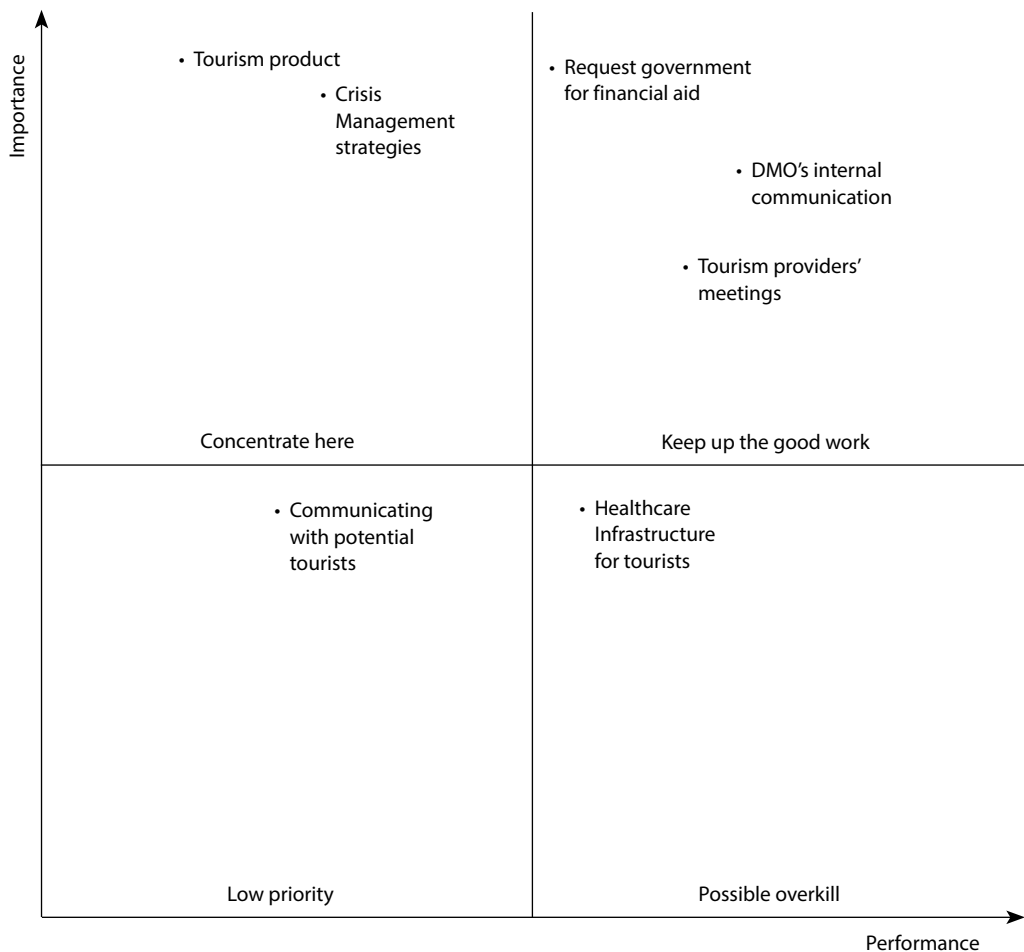
Strengths	Weaknesses
<ul style="list-style-type: none"> › Domestic tourism, for both leisure and business purposes, dominates the tourism industry in Norway › A strong position in nature-based tourism › National Hiking Trails project; the objective is to make these trails more robust and accessible › Lillehammer is largely seasonal, allowing it more time for recovery 	<ul style="list-style-type: none"> › The tourism product is weak due to the closed/in bankruptcy businesses › Limited resources for funding › Scarce resources for marketing campaigns
Opportunities	Threats
<ul style="list-style-type: none"> › New alliances among stakeholders › Norway will reduce the number of its counties, with renewed roles and wider responsibilities › Government funding and grants 	<ul style="list-style-type: none"> › Recession › Fear of traveling › Geopolitical, social and trade tensions › Higher unemployment rates

Sources: Tourism Destination Manager (personal communication, 2 April 2020); Own work.

8.3.2 Importance-performance analysis for Lillehammer during the COVID-19 crisis

Based on both the literature review and the Tourism Destination Manager Interview (personal communication, 2 April 2020), some essential elements for assessing crises like COVID-19 are identified. An IPA matrix serves as a visual method and is created by plotting each element's importance values and performance values on a two-dimensional graph (Hugo & Lacher, 2014). It is noted that the top priority is to recover the tourism product so that tourists visit Lillehammer after the crisis.

Figure 14: Importance-performance analysis for Lillehammer



Sources: Tourism Destination Manager (personal communication, 2 April 2020); Own work

8.4 EMPIRICAL RESEARCH

The empirical research was conducted together with the Destination Management Organisation (DMO), supported by the interview with the Destination Manager of Lillehammer (personal communication, 4 April 2020), which helped to collect insights and information concerning management of the COVID-19 crisis. This information, along with the literature overview and analysis of the destination, enabled a collection of policies for coping with the COVID-19 crisis to be presented.

8.4.1 Results and implications

Crises can be triggered by many factors not found in normal circumstances (Mao, Ding & Lee, 2010). In this case, Lillehammer's Destination Management Organisation and the responsible authorities have been making all efforts to removing the uncommon factors related to COVID-19 with a view to allowing tourist arrivals in the area. However, this pandemic illustrates the complexity of rapidly eliminating such uncommon factors. This leads to a need to develop policies that allow a crisis management strategy while removing the uncommon factors. In a later stage, when these factors have been removed, policies should guide the recovery stage.

The OECD (2020a) reports that the responsibility for developing and regulating tourism lies within the Ministry of Trade, Industry and Fisheries. The Ministry might work together with other ministries to coordinate policies that are important for tourism. Due to the sustainability scheme in which Norway is now operating, the Ministry of Climate and Environment is another key partner while developing policies to promote a more sustainable tourism sector. Regional and local authorities can also establish conditions, plans and regulations concerning infrastructure, utilities, national parks and local attractions linked to natural and cultural heritage. These authorities have strategies for tourism, and many give financial support to their local Destination Management Organisations (DMOs), which work as the link between government and tourism stakeholders.

The first policy for crisis management of the COVID-19 is to establish safe conditions for business activity, aiming to improve the cleaning measures and make them more visible to visitors so as to increase tourist confidence and satisfaction when traveling to this destination. Tourists must feel safe, and if they see that tourism stakeholders are taking care of hygiene, they will trust them, positively impacting their decision-making process. An indicator would be the existence and implementation of special cleaning programmes for hotels and restaurants. Further, a new idea surfaced during the interview with the Destination Manager of Lillehammer (personal communication, 4 April 2020): to increase hotels' perceived value by promoting their special cleaning measures and hygiene standards. This approach could result in greater occupancy levels given that visitors may have more trust in hotels' cleaning standards rather than in apartment owners from accommodation web-based platforms.

It has also been noted that the demand side needs guidelines for appropriate behaviour (Castelli, 2004). Hence, tourists must understand the new framework for safe behaviour. These guidelines should be developed and made available, aiming to minimise adverse impacts on sensitive sites and strengthen positive visitor behaviour. Accordingly, all tourism stakeholders have to collaborate to communicate and implement these measures. The DMO is responsible for coordinating this project with all of them.

The tourism product is formed by the attractions and businesses at the destination, of which some 80% are in the category of small and medium-sized enterprises (SMEs) (UNWTO, 2020e). Such companies need financial aid to offset their losses due to the missing steady stream of visitors (Destination Manager of Lillehammer, personal communication, 4 April 2020; Flynn & Lenaghan, 2007; Blake & Sinclair, 2003). Currently, the Norwegian government has in place economic measures to support jobs and reactivate the economy. These measures include cash support to compensate for their fixed expenditures, while the rate of VAT for passenger transport, accommodation and the cultural sector has been reduced from 12% to 8% (Norway Government, 2020). Moreover, 25% of the DMO's membership fee has been deducted for all annual members (Destination Manager of Lillehammer, personal communication, 4 April 2020).

These strategic actions are expected to lead to a better tourism product in the long term. The above-mentioned measures may be considered to be the most efficient policy response to balancing GDP and unemployment after a crisis (Blake & Sinclair, 2003). Johnson Tew et al. (2008) argue that working actively with industry associations and governments is the most frequently used strategy in the crisis-recovery stage. This means the present policy of increasing cooperation between stakeholders could be relevant for this crisis as would the goal of increasing the financial aid for businesses to recover.

The policy of developing a sustainable tourism industry could also be useful in the coronavirus crisis. The "Sustainable Destination" certification was awarded to Lillehammer following constant efforts to reduce the negative impact of tourism (Tourist Information Centre Lillehammer, 2020). This scheme is a tool for monitoring sustainable tourism development in terms of job creation, the promotion of local culture and products, and a better destination management model. This certification needs commitment, effective management, and to be economically viable (OECD, 2020a). Given that this certification was a positive result and has helped Lillehammer in being sustainable, the idea of introducing a new label or certificate regarding the special measures to prevent contagion and promote safety and hygiene arose from the interview with the Destination Manager of Lillehammer (personal communication, 4 April 2020). The idea is that with this label each tourism business in Lillehammer would certify that it is risk-free. In this way, visitors would feel safe if they can see the label.

The empirical research results are related to the five phases proposed by Scott, Laws and Prideaux (2007) in strategic policymaking development: (1) analysis of the current environment; Lillehammer's DMO examined the national and international situation, then; (2) development of potential strategic directions and choices; the DMO implemented safety measures and chose the strategic direction of reconstructing the tourism product with financial aid and focusing on the

next winter season; (3) the selection of a particular strategic direction; which in this case would be helping each tourism stakeholder to obtain funding and to develop hygiene quality standards; (4) implementation and control of the strategy; which is currently happening under the sustainable development scheme and; finally (5) evaluation and feedback of the strategic choice in order to learn how to improve the current implementation and future decisions, as managed by the DMO's teams through constant meetings and communication with the stakeholders.

The stakes of various tourism stakeholders in Lillehammer are at risk, creating the need to help each of them. As Evans and Elphick (2005) argued, the interdependence and complexity of elements of the tourism product make risks exceedingly difficult to manage. Yet, Lillehammer's DMO assigned teams to a group of stakeholders to facilitate the communication to assist them in a personalised way, following the same path for reconstruction of the tourism product. Effective communication, one of the crisis management's main pillars, is a priority of Lillehammer's DMO.

The primary goal is to reconstruct the tourism product with sector-specific targeted subsidies, loans, and tax reductions. Blake and Sinclair (2003) argue these policy responses are the most efficient ways of handling the negative effects of a crisis for a better tourism product in the long term and for balancing GDP and unemployment. As mentioned, the government has introduced significant measures to mitigate the economic effects of COVID-19 and hence the destination is moving in the right direction of reconstructing the tourism product.

Table 14: Policies suggested for Lillehammer

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Establishing safe conditions for business activity	Yes	Improve the cleaning measures and make them more visible to visitors to increase tourists' confidence and satisfaction	Ministry of Trade, Industry and Fisheries	The existence of special cleaning programmes for hotels and restaurants
Providing tourists information and measures to ensure safety when they are again able to travel	No	Guidelines for appropriate visitor behaviour are developed and made available, aimed at minimising adverse impacts on sensitive sites and strengthening positive visitor behaviour	The Destination Management Organisation (DMO)	Visitor behaviour at sensitive sites
Increase the perceived value of hotels	No	Promote the hotels' special cleaning measures and hygiene standards to increase occupancy rates	The DMO, the hospitality sector	The occupancy rate in commercial accommodation per month and the average for the year

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Developing a sustainable tourism industry	Yes, but not with the new Safety label	Introduce a new label regarding special measures to prevent contagion; Businesses would certify they are safe by displaying this label	The DMO	The label being displayed in hospitality and restaurant sector businesses
Increasing cooperation between stakeholders	Yes	Increase the financial aid for businesses to recover.	Ministry of Trade, Industry and Fisheries, the DMO	Funding for marketing campaigns during and after the crisis
Increasing cooperation between stakeholders	Yes	Tax allowances and exemptions	Ministry of Trade, Industry and Fisheries, the DMO	The postponed date of payment Reduced VAT from 12% to 7% 25% of the DMO's membership fee deducted
Increasing cooperation between stakeholders	Yes		Ministry of Trade, Industry and Fisheries, the DMO	Directing subsidies to the stakeholders with the biggest losses
Increasing cooperation between stakeholders	Yes		Ministry of Trade, Industry and Fisheries, the DMO	Provision or expansion of loan programmes to small businesses, fast and easy access to short- and medium-term loans to overcome liquidity shortages

Source: Destination Manager of Lillehammer (personal communication, 4 April 2020).

8.4.2 Limitations

The chapter concentrates on the effects of the COVID-19 pandemic in Lillehammer, Norway. The strategic and operational actions there might not be suitable in other destinations. Moreover, this research was made in the middle of the COVID-19 crisis, meaning the empirical research just recorded the situation in a specific time frame. This means it is possible that the interviewee might implement new strategies and policies afterwards.

In addition, the characteristics of the interview may raise the limitation of self-reported data (Ross & Zaidi, 2019), which implies the possibility of the interviewee changing their behaviour while being observed or interviewed. In the same manner, the interviewer's beliefs might also influence the results of the research (Alsaawi, 2014). Further research is needed to understand the crisis management and policymaking process with respect to COVID-19 in the tourism sector.

8.5 CONCLUSION

This chapter reviewed the theory of crisis management in the tourism sector, aiming to understand the role of policymaking and its strategic process. Policymaking is a social process involving communication between people who have a stake in a certain matter, reflecting wider societal features that shape the environment (Stevenson, Airey & Miller, 2008). In Lillehammer's case study, it is noted that each member of the tourism sector is working together with the DMO's team to find financial aid and to start policymaking processes regarding COVID-19's adverse effects. This might be a challenging task due to the dynamic environment, which adds complexity to the decision-making process. Nevertheless, Lillehammer's DMO is finding solutions and promoting effective communication and responsiveness, which are identified as the main pillars of crisis management strategies.

Since tourism is a service-based industry, crises related to visitors' safety in the physical space will result in fewer visits, which means a downturn for the related businesses, with possible bankruptcies and closed attractions. This situation implies a weak tourism product for Lillehammer, whose recovery is the biggest priority for current and future policymaking. For this purpose, strategic planning is needed whereby analysis of the environment would lead to a decision on which direction to take. In this case, the direction has been to ensure high hygiene standards and promote financial aid. All of the policies have been developed under the Sustainable Tourism Development certification, which requires that the environmental, socio-cultural and economic spheres be balanced.

Overall, strategies rely on policies to serve as a guide concerning the next steps in crisis management. Here, Lillehammer has a flexible strategy which seeks recovery in the long run. Crisis management is a continuous learning process that requires a feedback loop to understand the relationship between the plan and the ever-changing environment.

9 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN FUNEN, DENMARK

Maria Gympaki

ABSTRACT

The modern world is constantly undergoing crises of different natures, with the current one being the COVID-19 pandemic. Being particularly vulnerable to external effects, the tourism industry is always affected by such crises to some extent. The purpose of this chapter is to explore crisis management strategies and policies employed in crises of the past and to offer recommendations that could be applied to Funen (Fyn), Denmark's third-largest island. Generally speaking, every crisis is different, and an effective crisis management plan should consider the destination's unique characteristics. Research also suggests that any crisis, if managed correctly, can create opportunities for the destination. This chapter is based on an interview conducted with the manager of the Destination Management Organisation (DMO) in Funen. The main interview findings are that at the time of the interview Funen as a destination had still not developed a detailed long-term recovery plan from the crisis. The DMO is currently concerned with managing the crisis and reducing its impact, meaning the measures it takes are more short-term in focus. Some basic principles upon which to build Funen's recovery are sustainability, digitalisation and promotion of the island as a safe and clean destination to both the local market and the markets of the neighbouring countries. The manager highlighted the unprecedented nature of the ongoing crisis yet also saw it as an opportunity for the companies involved to restructure their business models and become more sustainable. Confronted with the crisis, Danish DMOs have also re-evaluated their tasks and responsibilities and are working closely together.

9.1 INTRODUCTION

The first cases of the coronavirus disease were supposedly detected in the Chinese city of Wuhan in December 2019 with the virus since spreading all over the world. On 11 March, the outbreak was declared a global pandemic by the World Health Organisation (WHO). In Denmark, the first confirmed case was reported on 27 February (Statista, 2020) while on 14 March the Danish government announced it was closing the borders to foreign visitors (Denmark Media Centre, n.d.). Schools, administrative establishments and public spaces (including non-essential stores, places of worship, cinemas, theatres etc.) were closed. Further, large gatherings of over 50 people were banned (Danish Police, 2020). The purpose of this section of the text is to illustrate and analyse the policies that Funen, a small island in Denmark, has introduced or plans to introduce in order to deal with the COVID-19 crisis.

Funen is the third-largest island, after Zealand and Vendsyssel-Thy, in Denmark (Britannica, n.d.) and located between Zealand and mainland Denmark (Denmark Media Centre, n.d.). It is bounded by straits to the west (the Little Belt) and to the east (the Great Belt) with both straits being crossed by rail and road connections (Britannica, n.d.). Funen has 93 islands, 123 castles,

1,200 km of coastline and 1,200 signposted cycle routes (Destination Fyn, n.d.). The island has its own archipelago (Denmark Media Centre, n.d.) and many chief ports such as Odense, Assens, Svendborg, Nyborg etc. (Britannica, n.d.). Odense, the birthplace of the author Hans Christian Andersen, is Funen's largest city. National Geographic (2018) included Funen's Kerteminde on a list of Europe's best secret villages.

At the start of this chapter, some theoretical information is provided regarding the concepts of crisis in tourism, crisis management as well as tourism strategies and policies for coping with crises. Then, based on a literature review conducted by the author certain strategies and policies for Funen are recommended. The measures recommended draw from policies introduced in the past in destinations with similar characteristics to Funen. The next section describes the destination and gives some information about its characteristics and tourism development. Finally, analysis of the results and the implications of the interview with the DMO manager are presented, followed by a table displaying the measures the Danish government and the DMO in Funen have in place or plan to introduce.

9.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN FUNEN

In this section, the findings of a literature review are presented and recommendations offered about particular strategies and policies that could be implemented in Funen to help overcome the crisis. These recommendations are based on the literature review of other destinations with similar characteristics, such as islands, rural areas and destinations that have mainly developed nature-based tourism.

The tourism industry has in the past undergone a wide range of crises (Gössling, Scott & Hall, 2020; Laws & Prideaux, 2005). Still, COVID-19 seems to be an unprecedented crisis, having already affected all parts of the hospitality value chain (Gössling, Scott & Hall, 2020; OECD, 2020b). COVID-19 is foremost a humanitarian crisis bringing crippling effects for the tourism sector (Manolova et al., 2020; OECD, 2020a, 2020b; Phillipson et al., 2020). Within a few months, the framing of the global tourism system moved from overtourism to non-tourism, making the tourism sector one of the most heavily hit (OECD, 2020b). Unlike earlier health-related crises, such as SARS and MERS, which were smaller in scale and whose impact on tourism was more localised, the ongoing pandemic is global and expected to endure longer (OECD, 2020b). However, the experience of previous crises shows the tourism industry is resilient as the eagerness to travel has always recovered (OECD, 2020b). Yet, COVID-19 has triggered an economic crisis that has seen the economies of many countries go into recession, meaning the recovery of tourism will be slower than after previous crises (OECD, 2020b).

Concerning when Cyprus faced a financial crisis, Archontides (2007) as well as Boukas, Boustras and Sinka (2012) suggested diversification of the tourism product, improvement of its quality and the development of different types of tourism. The new tourism product, they stressed, should be based on quality and on the principles of sustainable development. This measure could also

apply to Funen because Denmark is a very expensive country not only to live in but to visit. Thus, product diversification could give the visitor the feeling that they are receiving good value for the money spent.

Some other strategies and policies that could be applied to Funen may be found in the rural areas of the United Kingdom when it was suffering from the consequences of foot and mouth disease. Given that the form of tourism most affected at that time was rural tourism, Hall (2007) suggested the collaboration of rural tourism businesses and the education sector. Undoubtedly, rural tourism could provide an important educational environment for young people, particularly those raised in cities who might be divorced from many aspects of the non-urban environment. Educational visits in Funen thus hold the potential to re-invigorate rural attractions and the businesses that depend upon them while at the same time raising the environmental awareness of the young generation.

9.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR FUNEN

Funen is the third-largest island of Denmark and has 488,384 inhabitants (Destination Fyn, n.d.). The biggest city is Odense and Funen generally offers nature-based tourism. The destination is mainly visited by families and couples. Some general information about Funen is provided in the table below.

Table 15: Basic indicators for Funen

Indicator	Funen (Fyn)/Denmark
Area in km ²	2,984
Population (number)	498,542
Registered unemployment rate (%) [in the region Southern Denmark]	4.3
Tourism arrivals in 2019 (number)	No data available
Tourism arrivals growth 2019/2018 (%)	No data available
Nights spent 2019 (number)	3.6 million (in 2017)
Nights spent growth 2019/2018 (%)	-1.07

Sources: Folke et al. (2021); De Regionale Arbejdsmarketsråd (n.d.); Destination Fyn (n.d.); European Commission (2020); Statistics Denmark (n.d.)

9.3.1 SWOT analysis for Funen in light of the COVID-19 crisis

SWOT analysis emerged in the 1960s (Learned et al., 1965) and can be a very useful tool for decision-making (Gao & Peng, 2011). Funen's nature and its nature-based tourism activities may be seen as the island's biggest assets that hold the potential to contribute to its recovery. At the same time, the high prices, lack of access to many of its parts and dependence on the Chinese market may hinder its recovery. The data presented in the figure below are drawn from 1) the author's own experience as a tourist in Funen; 2) the interview with the DMO manager; and 3) a governmental document published in 2014 (Danish Ministry of Business and Growth, 2014).

There is no doubt that Denmark is a sustainable (Global Sustainability Competitiveness Index, 2020) and safe (Ledsom, 2020) destination with a very high quality of life (World Population Review, 2021). Funen may be characterised as a peripheral destination that does not enjoy the same levels of brand awareness as other Danish destinations like Copenhagen. Further, Funen's (and Denmark's) economy does not depend on tourism (Manager of the DMO for Funen, personal communication, 2 April 2020), although it is the author's understanding as a tourist in Funen that the island (but also Denmark as a whole) has yet to realise its full potential as a tourism destination. Moreover, in the last few years Funen had been targeting Chinese tourists with marketing campaigns and its tourism industry has grown to depend on the Chinese market, which in the context of COVID-19 will present a significant challenge (Manager of the DMO for Funen, personal communication, 2 April 2020). In the figure below, a SWOT analysis for Funen is presented, as drawn from the author's own experiences as a tourist in Funen, the literature review and the interview conducted with the manager of the DMO of Funen.

Figure 15: SWOT analysis for Funen

Strengths	Weaknesses
<ul style="list-style-type: none"> › A peaceful and safe destination › Hans Christian Andersen, Odense › Urban- and nature-based tourism › A sustainable destination › A camping destination › 1,000 km of signposted bike routes › Trekking paths 	<ul style="list-style-type: none"> › More expensive flights from and to the airport in Odense › Not highly developed city tourism › The large number of unskilled workers in the tourism industry (57%) › Many parts of Funen cannot be reached by public transport › Seasonality
Opportunities	Threats
<ul style="list-style-type: none"> › Denmark's destination image as a highly developed with advanced infrastructure and developed medical system › Digitalisation efforts › Quality tourism › The strong domestic market with high disposable income › Collaboration between the public and private sectors › Main tourism markets: the neighbouring countries 	<ul style="list-style-type: none"> › Unprecedented nature of the ongoing crisis › Competition from Copenhagen and other Danish destinations › Its under-exploited tourism potential › Danish weather › Seasonality › Denmark: not competitive due to the high prices › Growing dependence on the Chinese market in the last few years

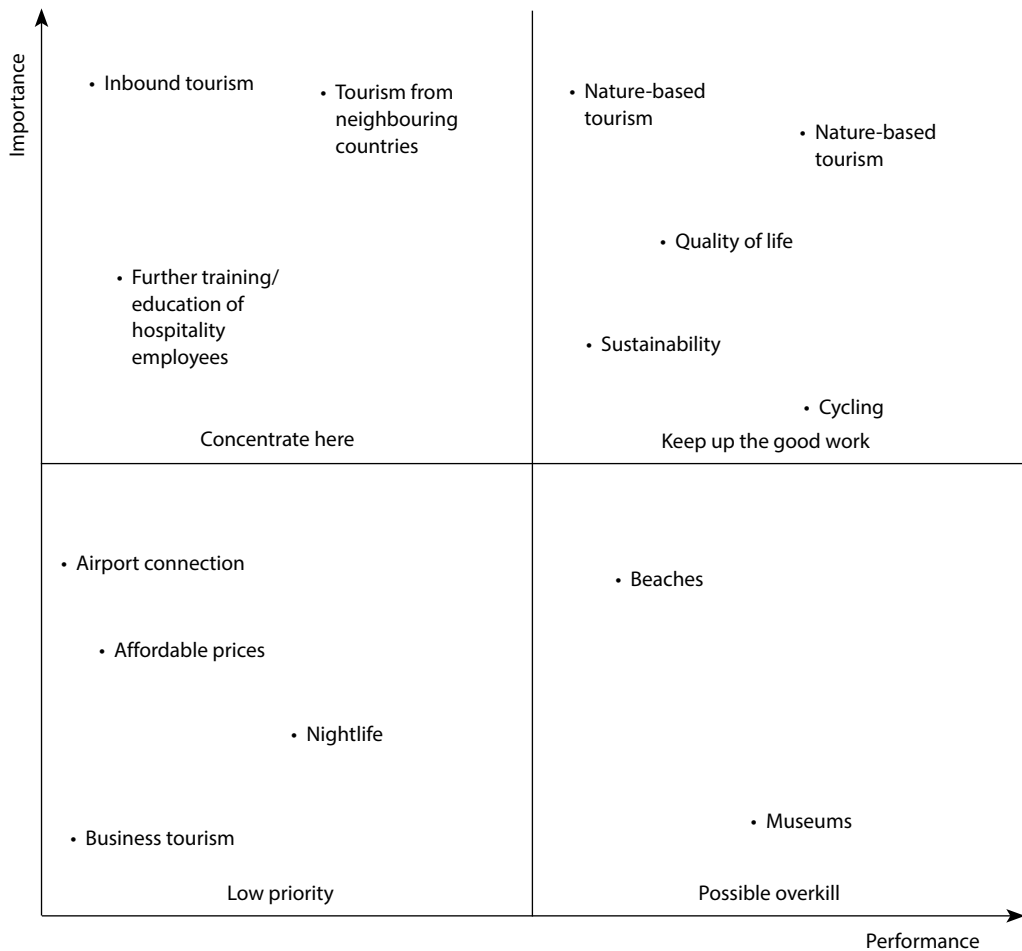
Sources: Denmark Media Centre (n.d.); Destination Fyn (n.d.); Manager of the DMO for Funen (personal communication, 2 April 2020); Own work

9.3.2 Importance-performance analysis for Funen during the COVID-19 crisis

Importance-performance analysis is a technique developed by Martilla and James (1977) and is used by policymakers to identify service/product elements whose allocation of resources could lead to the greater satisfaction of the users (Ormanović et al., 2017).

As the figure below illustrates, Funen has been performing very well in the quality of life of its residents, in its sustainability performance and in safety and security, while it has been underperforming in terms of airport connection, affordability and nightlife. It seems there is space for improvement in development of the business and urban tourism, and there might be some overkill in the beaches, museums and culinary offerings. In the following figure, an importance-performance analysis of Funen is presented based on both the author’s own experience as a visitor in Funen and the interview with the manager of the DMO for Funen (personal communication, 2 April 2020).

Figure 16: Importance-performance analysis for Funen



Source: Manager of the DMO for Funen (personal communication, 2 April 2020); Own work

9.4 EMPIRICAL RESEARCH

Neuman (2014) believes the adjective “empirical” refers to anything we are able to observe or experience with the use of our human senses (touch, sight, hearing etc) or indirectly with the use of techniques that extend these senses. Empirical data/observations can be quantitative, namely, they are expressed as numbers, or qualitative, meaning that they are expressed as words, images or objects (Neuman, 2014). Empirical research for the needs of this section of the chapter was conducted using the research method of a qualitative semi-structured interview with the manager of the DMO for Funen (personal communication, 2 April 2020). The DMO manager was interviewed about the ongoing crisis, the reactive measures his DMO has implemented and the different ways tourism policymaking has been affected by the urgency of the pandemic. In the next section of this chapter, the results and implications of the interview with the DMO-manager are presented

9.4.1 Results and implications

Funen as a destination has developed nature-based tourism and offers activities like cycling and fishing, whereas its city tourism is not that developed (Manager of the DMO for Funen, personal communication, 2 April 2020). One exception is Odense, the largest city in the region, which has been quite a popular urban destination for the Chinese market, mainly because it is the birthplace of Hans Christian Andersen. The undeveloped city tourism in Funen, which may be seen as a weakness of the destination in normal times, might contribute to its recovery, since the manager claims that it will take some time for tourists to feel safe in crowded places.

Funen’s main tourism markets are predominantly Germany and the Netherlands, followed by Sweden and Norway. As mentioned, in the last few years Odense and other destinations in Funen have engaged in some marketing efforts in China. Apart from Hans Christian Andersen, Odense’s proximity to Copenhagen helped with its tourism development and expansion to the Chinese market. Tourism in Funen plays a significant role, yet its economy is not dependent on it despite being an island (Manager of the DMO for Funen, personal communication, 2 April 2020). Maritime and robotics add considerably to the region’s economy (manager of the DMO for Funen, personal communication, 2 April 2020) and both sectors have proven to be more resilient than tourism.

In relation to business tourism in Funen, the DMO manager claims that Funen, when compared with Copenhagen or Aarhus, was underperforming. The main cities/towns in Funen that had developed business tourism were Odense, Nyborg and Svendborg. The DMO in Funen has a specific unit devoted to business tourism, with the unit also being responsible for sports events. Badminton and cycling were particularly developed in Funen and Odense has been hosting “Denmark Open”, one of the biggest badminton tournaments in the world (manager of the DMO for Funen, personal communication, 2 April 2020). At the time the interview was conducted, the Danish government was considering cancelling major events and conventions with large crowds, a measure expected to impact business and sports tourism considerably.

The interviewee repeatedly expressed his concerns about when the tourism market will unfreeze. He regarded the summer of 2020 as a test that would challenge the capacity of the accommodation sector on the island. This ongoing crisis is unprecedented, meaning that even looking at previous crises (such as SARS, or the volcano eruption in Iceland) is not particularly useful (Manager of the DMO for Funen, personal communication, 2 April 2020). Yet, he found this crisis challenging but also interesting and motivating as the different DMOs and businesses will have to “un-learn everything” they know and “learn business from the bottom up”. He also mentioned that during the crisis he had had a chance to observe the whole spectrum of human behaviour; some colleagues are deeply worried and concerned, while others are particularly motivated to deal with the COVID-19 crisis.

The DMO manager of Funen perceives Denmark and Funen as highly digitalised, and he supports small businesses in their use of digital means. In the past 3 years, the DMO in Funen has worked in a programme called the “Digital Academy”, the result of collaboration between the DMO in Funen and the University College Lillabealy (UCL), that was offering digital literacy training for small enterprises. The DMO has also been striving (and still is) to digitalise its marketing efforts (Manager of the DMO for Funen, personal communication, 2 April 2020).

A very big share of tourism enterprises in Funen are small. Moreover, Funen does not have any ‘big player’, like Legoland or Tivoli, which “can lead the way” or attract tourists (Manager of the DMO for Funen, personal communication, 2 April 2020). These small businesses are currently under huge pressure by the collapse of demand and their lack of economic stability (Manager of the DMO for Funen, personal communication, 2 April 2020). Still, the interviewee found the measures introduced by the Danish government to be effective and that they provide valuable assistance to the tourism companies (albeit, in the short run).

When asked about policymaking in times of crises, the manager stated that decisions are being taken much faster now. In ‘normal’ times, when they had to decide on strategies and policies, it was quite a long and extensive procedure since Funen is made up of 10 different municipalities. Faced with COVID-19 though, there is a sense of urgency, measures are being taken rapidly and resources are quickly deployed. Everybody must be alert and cooperation is definitely required (Manager of the DMO for Funen, personal communication, 2 April 2020). Before the pandemic, the Danish economy was growing and there was prosperity. The government and the policymakers were focusing on ‘luxurious’ problems, such as further improvement of the quality of life of Danish citizens, and sustainability (Manager of the DMO for Funen personal communication, 2 April 2020).

Throughout the interview, the DMO manager expressed the view that the current crisis may be seen as a unique opportunity for businesses to reconsider their business models and become more sustainable. He also illustrated this standpoint with examples of convention hotels that could attract visitors wishing to have a city break, and restaurants that have already started to deliver food to homes. Many businesses emerge as a result of a crisis or existing companies are re-thinking their business models (Manager of the DMO for Funen, personal communication, 2 April 2020). For instance, he believes that online business meetings are likely to become the new norm in the

future, with the reason no longer being COVID-19 but sustainability. He wants his DMO to guide the enterprises on the island during this transition. Even his DMO will have to re-organise and re-consider its role and its responsibilities for the local community.

As far as the measures taken by the government are concerned, the DMO manager finds them efficient: small and single-person businesses will receive compensation for the loss of business. Further, the DMO of Funen has 10 business consultants that support small businesses and guide them while applying for governmental support packages. His DMO is also helping companies update their websites (Manager of the DMO for Funen, personal communication, 2 April 2020).

All of the current efforts are concentrated on safeguarding the existence of the enterprises and no long-term plans have yet been developed. Focussing too much on the ongoing pandemic and not looking at the bigger picture, i.e., long-term strategies, might prove problematic or even dangerous. His DMO intends to work on long-term policies in the summer. In spite of the governmental response, the manager was aware that many enterprises will not survive the crisis and are bound to go bankrupt. The years 2020 and 2021 are expected to be difficult for the tourism sector (Manager of the DMO for Funen, personal communication, 2 April 2020).

During the interview, the DMO manager (personal communication, 2 April 2020) also cited predictions made by the director of the Danish National Bank, who had described three possible scenarios for Denmark's GDP growth: the best-case scenario sees a decline of 3%, the realistic a decline of 5% and the worst-case scenario a decline of 10%. Prior to the crisis, DMO manager claims there was stability and widespread optimism and the government was able to take measures regarding matters that were not crucial.

Despite these negative predictions, COVID-19's impact on Denmark will be one of the mildest in Europe compared with countries like Spain, Italy, Sweden or some parts of Germany. The DMO is planning to use this in its marketing campaigns, i.e. to promote Denmark's and Funen's clean and unspoiled nature and safe and peaceful environment. Another core concept in the marketing efforts will be the promotion of Danish destinations, at which visitors will not be exposed to large crowds (Manager of the DMO for Funen, personal communication, 2 April 2020). The interviewee stated the marketing campaigns are to focus on the inbound and neighbouring markets (mainly Swedish and Northern German). One important aspect that he and his colleagues are taking into consideration is the local community. He believes it will take some time for Danish residents to feel comfortable around Chinese or the nationals of other countries severely affected by the pandemic, such as Americans.

Cooperation and collaboration are pivotal in the fight against COVID-19. The DMO in Funen is working together with educational institutions and professors that provide their expertise and support. Moreover, various DMOs around Denmark are collaborating with the aim of ensuring that there will be no competition between them and that, instead, they will concentrate on increasing the overall demand (Manager of the DMO for Funen, personal communication, 2 April 2020). The DMOs have also had to re-define their tasks and responsibilities, as the DMO manager illustrated

with the example of “Visit Denmark”, which normally is not responsible for the inbound market but, when faced with the COVID-19 crisis, joined forces with other smaller DMOs in a marketing campaign that promotes Denmark as a destination to Danes.

As mentioned, the DMO manager perceives the current crisis as a turning point for tourism and as a unique opportunity for enterprises to restructure their business models with the concept of sustainability placed in the centre. Further, he shared his intention to develop indicators with the aim of measuring sustainability. Lastly, referring to the indicators his DMO is presently using (arrivals, receipts, number of enterprises that are members of the DMO’s network, indicators measuring the participation rate at cycling events etc.), he contends that his DMO cannot take credit for everything if things go well and cannot be blamed for everything if things deteriorate. In the table below, some policies are suggested that could be implemented in Funen.

Table 16: Policies suggested for Funen

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Shutdown	Yes	Contain the spread of the virus	National government	The number of new cases/deaths
Fiscal measures	Yes	Wage compensation scheme for tourism enterprises		The unemployment rate
		Compensation for fixed expenses (e.g. rent)		The number of enterprises that will apply/go into bankruptcy
		Loan guarantee scheme	National government, Banks	
Restructure target markets	No	National campaign (promoting Denmark to Danes)	Collaboration between “Visit Denmark” and regional DMOs	Tourist arrivals
Quality and sustainable tourism	Yes, but it will be further developed	Promotion of nature-based tourism to neighbouring countries	“Visit Fyn”	Tourist receipts
		Promotion of Danish destinations as ‘safe’ and ‘clean’	Collaboration of DMOs	Length of stay
		Development of a standard for Danish quality tourism	National government, “Visit Denmark”	The development of indicators to measure sustainable and quality tourism
		Collaboration between the tourism industry and higher education	“Visit Fyn”, University of Southern Denmark	Education level of employees in the tourism industry

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
		Digitalisation to maximise the tourism experience	"Visit Fyn", University College Lillebaelt	The number of businesses that make use of digital means

Source: Manager of the DMO for Funen (personal communication, 2 April 2020).

9.4.2 Limitations

Heath (1998, p. 272) states that "no crisis has exactly the same form, the same time limitations, the same demand for resources...or the same temporal, social and economic threats". As mentioned in this chapter, each crisis is unique, and the current crisis is unprecedented and ongoing. The nature of the crisis makes it very hard to create strategies and policies or make any predictions. This is one major challenge that the interviewee and of course policymakers around the globe currently face. Further, due to the time and space limits, no generalisations can be made. Many more different aspects of this multifaceted crisis as well as stakeholder perspectives could also be addressed, making it a subject that definitely merits further research attention.

Another important limitation refers to the author's inability to understand Danish. The different DMOs in Denmark only have a small number of publications available in English. This led the author to rely on online translation sites such as Google Translate. Further, all of the academic but also the press literature, which is already limited, regarding tourism in Denmark is largely concentrated on Copenhagen or Denmark as a whole. There is a profound lack of information concerning tourism (development) in Funen.

9.5 CONCLUSION

Crises of varying natures may be seen as a component of the globalisation process. The ongoing COVID-19 crisis is threatening the existence of many businesses in the tourism industry and in other industries as well. Even after the virus disappears it is expected that it will take some time for the economy and the tourism industry to recover. Unlike SARS or the economic crisis of 2008, COVID-19 has affected countries right across the globe and brought the tourism industry to a standstill. This crisis is unprecedented and its timeframe remains unknown. Yet, there is a consensus that COVID-19 will be a turning point for the tourism sector.

According to the interviewee, Denmark recognised the crisis in time and its response was also quick and effective. Denmark has thus not been severely affected by the pandemic. Both the Danish government and the DMO in Funen are currently focused on covering the short-term needs of the people as well as the needs of the small businesses that are suffering from the pandemic's impact. The future strategies of the DMO will chiefly be focused on sustainability, digitalisation, nature-based tourism as well as marketing events targeting Danish nationals as well as the nationals of

the neighbouring countries. Since Denmark has not been seriously affected by the ongoing crisis, the DMO in Funen was planning to use this competitive advantage in its marketing campaigns in combination with Funen's unspoiled, clean and safe nature.

10 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN LOIRE-ATLANTIQUE, FRANCE

Olivia Bourkel

ABSTRACT

This chapter seeks to analyse the grounds on which policies are developed and implemented in times of crisis, specifically during the COVID-19 pandemic. The literature on crisis management, tourism policies and tourism strategies in times of crisis are reviewed and the policymaking process is studied in more depth from the perspective of the Loire-Atlantique destination, located on the West coast of France, through empirical research and a semi-structured interview with the head of the local Department for Commerce and Tourism. Results from the literature and the empirical research are connected and compared in order to formulate adequate tourism policies for the destination to cope with the COVID-19 crisis. An analysis of the strengths, weaknesses, opportunities and threats at the destination in light of the crisis will also be conducted with a view to better understanding the factors that influence the policies and determine which strategies and measures are more appropriate for that type of destination.

10.1 INTRODUCTION

Loire-Atlantique is a French administrative department located on the North-West coast of the country. In 2018 it was the 7th most popular destination in France (Loire-Atlantique Développement, 2019) and has developed an image as a destination for “slow tourism” (Presse Océan, 2017). Its capital Nantes has become considerably more attractive over the past years as both a city and a tourist destination, due to the development of its large cultural tourism offer and the successful effort to attract MICE tourism, which has benefited the whole department, notably through the diverse routes of the Voyage à Nantes tourism initiative, which leads tourists to the coastal, rural and wine areas of the Loire-Atlantique.

Since early on in the 21st century, the world has experienced different types of crises, natural or man-made, which have revealed the tourism industry’s particular susceptibility and vulnerability to disasters (Pforr & Hosie, 2008). In December 2019, a coronavirus outbreak started in Wuhan, China and rapidly reached all countries around the globe. Globalisation and international travel accelerated the virus’ spread and on 30 January 2020 the World Health Organisation declared a public health emergency of international concern (World Health Organisation, 2020a) and, by 11 March 2020, the outbreak had been declared a pandemic. In the midst of the COVID-19 pandemic, the world’s economic activities have drastically slowed, while the tourism sector has been put on hold, with half the global population forced to quarantine (Le Monde, 2020). For instance, all destinations have implemented travel restrictions (UNWTO, 2020b), air travel has dropped significantly, free movement has at times been temporarily halted within the EU, and social contacts have become unconscious risks.

By considering the existing literature on crisis management in tourism, the available data on the coronavirus pandemic and information collected in empirical research on the destination of Loire-Atlantique in France, this chapter seeks to analyse which tourism strategies and policies would be most suitable for Loire-Atlantique to respond to the COVID-19 crisis. The findings of this chapter are compared with the results of similar papers concerned with a wide range of other destinations in order to understand with respect to numerous factors how crisis management, tourism strategies and policies differ from one destination to another.

10.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN LOIRE-ATLANTIQUE

How any country has handled the COVID-19 pandemic will most likely influence tourists' perception of the risk and safety, and their decision whether to visit after the crisis ends. With the fourth highest number of deaths caused by the coronavirus disease as at 4 April 2020, (Worldometer, n.d.), France has been widely affected by the epidemic and shown its inability to contain the virus and the lack of resources in its healthcare system, which has led to the higher death rate. Hypothetically, countries like China, South Korea and Germany with lower death rates and/or proven to have more efficiency in controlling the virus' spread, will benefit from their safer destination image once the crisis. The irresponsible attitude reported in the international news of some French residents not respecting the lockdown or social-distancing measures might also increase tourists' perception of the risk to travelling to France. This makes it strategically important for the French government to collaborate with the media to counterbalance this negative image with positive media coverage, for example reporting on the dedication of the local medical and staff and volunteers or on solidarity among the community. It is also important that the public sector take reactive and corrective policies to improve the healthcare system, along with proactive policies to make French destinations attractive again after the crisis by investing in safety and imposing strict sanitation measures on tourism stakeholders. In order to restore tourists' confidence, the communication strategies of the destination should stress their implementation. Medium-term policies could encompass upgrades of security procedures at ports, airports and other major transport facilities (Gurtner, 2007a), reinforced sanitation of public spaces (Henderson, 2007a), as well as stricter controls of compliance with social distancing and compulsory use of face masks.

Another strategy could be to target domestic markets more intensively after the crisis. Indeed, domestic and regional travel are more likely to resume quicker than international travel, even though the length of a stay and the expenditures made by local tourists are generally lower than with international travellers (Gurtner, 2007a). Air travel throughout the world has been and will most likely continue to be drastically affected by the COVID-19 crisis since the pandemic has hit countries with the highest air passenger traffic hard and is spreading across the world, yet it is possible the demand for international tourism will only be deferred, not extinguished (Laws, Prideaux & Chon, 2007). In the meantime, people might still be willing to travel closer to home and targeting the domestic market might thus represent a viable strategy for compensating for the loss of international arrivals. As the Loire-Atlantique's tourism market is already focused on domestic tourists, with 9 out of 10 tourists being nationals (Loire-Atlantique Développement, 2019), this strategy only needs to be reinforced. On the other hand, companies might be reluctant

to send their employees on business trips for some time after the crisis (Henderson, 2007a) and the successful use of teleworking and video-conference software might mean a drop in MICE tourism in the long run.

In this uncertain context, it is vital to conduct studies on different target groups' behavioural intentions in order to adapt the tourism product to each type of destination and adopt suitable marketing strategies. Loyal customers tend to be the first to come back, meaning another important strategy could be developing a strong relationship with them in peaceful times (Mair, Ritchie & Walters, 2014). Finally, the development of niche markets such as rural, eco- and nature-based tourism might be successful because tourists will most likely want to avoid crowds and close social contact for a period of time following the crisis. Hall (2007) highlighted the benefits of educational visits to the countryside for school children since field trips awaken their interest in rural environments and may act as catalysts for family holiday decisions. The education, agriculture and tourism sectors could collaborate to increase such field trips with the goal of developing tourism in less developed rural areas.

The literature also emphasises the importance of involving local residents in new tourism planning given that they are the ones most affected by the crisis and by the development of tourism. In fact, consultation and collaboration with the host community is vital for ensuring the destination's durable resilience and tourists' satisfaction (Matsny, 2001). The impacts of the crisis could trigger higher rates of unemployment, depression, desperation and increase social tensions among the host community (Gurtner, 2007a), which in turn could negatively impact visitor satisfaction and the destination's attractiveness. Therefore, working towards assuring the residents' well-being should be another part of the recovery strategy, making the taking of their opinion into account in the decision-making process essential. This means the crisis can provide an opportunity to correct past mistakes and ensure more sustainable tourism development at the destination.

10.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR LOIRE-ATLANTIQUE

To better understand the destination under study and help formulate suitable policies for coping with the crisis, a tourism evaluation of Loire-Atlantique is seen as necessary. This section presents key figures concerning tourism in Loire-Atlantique, as well as a SWOT and importance-performance analysis of the destination.

Table 17: Basic indicators for Loire-Atlantique

Indicator	Loire-Atlantique
Area in km ²	6,874
Population (number)	1.426 million
Registered unemployment rate (%)	7
Tourism arrivals in 2019 (number)	6.5 million air passengers 12.55 million train passengers
Tourism arrivals growth 2019/2018 (%)	36.4 air arrivals 8 train arrivals
Nights spent (number)	22.6 million
Nights spent growth 2019/2018 (%)	3.6 for nights in hotels and camping

Sources: Loire-Atlantique Développement (2018, 2019); Regional Economic and Social Observatory of the Pays de la Loire (2019).

10.3.1 SWOT analysis for the Loire-Atlantique in light of the COVID-19 crisis

A SWOT analysis allows a destination's strengths and weaknesses to be determined and reveals potential threats it might face or opportunities it could seize. According to the figure below, the Loire-Atlantique department benefits from dynamic development and investments in various types of tourism. Yet, the commercial accommodation in Nantes, the capital, relies heavily on MICE tourism, while the coast suffers from high seasonality in summer, leaving many tourism enterprises quite vulnerable to the crisis. Still, the crisis could represent an opportunity for businesses and destinations seeking to develop niche markets and nature-based tourism, while VFR tourism, which accounts for most of the nights spent by tourists in the Loire-Atlantique, will most likely find it plain sailing during the upcoming summer season. The sources used for the analysis are reports and statistics published by the local authorities in charge of the economic and tourism development and observation in the department, the information collected during an interview conducted with the head of the local Department for Commerce and Tourism, and personal work and experience at the destination.

Figure 17: SWOT analysis for Loire-Atlantique

Strengths	Weaknesses
<ul style="list-style-type: none"> › A diverse tourism offer (cultural, MICE, wine, bike, beach, adventure, gastronomy...) › Diversity of landscapes and natural assets › Economic dynamism › Events and festivals › Accessibility to domestic and international tourists › Collaboration networks involving municipalities › Strong collaboration between the public and private sector (Interviewee) › Emphasis on sustainable development 	<ul style="list-style-type: none"> › Lack of collaboration with neighbouring regions › Lack of attractiveness to international tourists › Reliance on Parisian tourists (1/4 of all domestic tourists) › Many tourism SMEs vulnerable to the crisis › The congested international airport › Prevalence of non-commercial tourist stays (VFR tourism and secondary homes) › High seasonality along the coast › Increasing delinquency
Opportunities	Threats
<ul style="list-style-type: none"> › Attract domestic and regional tourism › Mild climate in summer, even during national heat waves › Rural and sports tourism › Economic dynamism and diversification, little reliance on tourism › Ongoing development of tourist attractions › Numerous open-air events in summer › Prevalence of private and non-commercial accommodation › Social tourism (holiday vouchers) › An innovative and collaborative environment 	<ul style="list-style-type: none"> › Impact of the pandemic on international arrivals › Impact on shared accommodation and indoor services and attractions › Impact on MICE tourism › Increasing competition on the national level for domestic tourists › Economic crisis and social tensions › Massive bankruptcies of SMEs

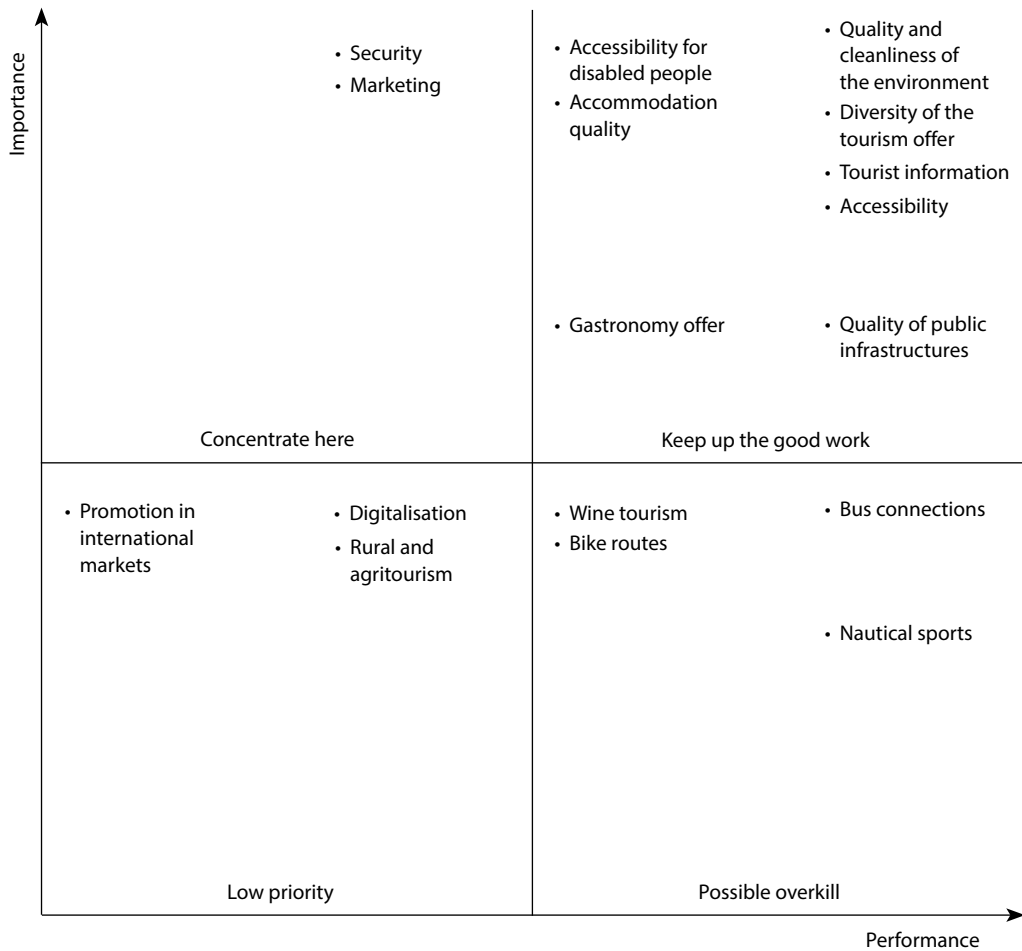
Source: Head of the local Department for Commerce and Tourism (personal communication, 2 April 2020); Own work.

10.3.2 Importance-performance analysis for the Loire-Atlantique during the COVID-19 crisis

Importance-performance analysis (IPA) is a useful instrument for analysing customer satisfaction and management strategies. This evaluation technique can help tourism stakeholders diagnose latent inadequacies and determine priorities in the development of tourism (Sever, 2015).

Figure 18 reveals that the destination's overall performance in terms of offering sufficient and quality tourism infrastructures and developing a varied tourism offer is good, but efforts still need to be made regarding security at the destination and its promotion, especially as competition in attracting the domestic market from the neighbouring regions is likely to increase following the crisis.

Figure 18: Importance-performance analysis for Loire-Atlantique



Sources: APF France Handicap & IFOP (2020); Head of the local Department for Commerce and Tourism of the Loire-Atlantique (personal communication, 2 April 2020); Own work.

10.4 EMPIRICAL RESEARCH

To complement the literature on tourism policies for dealing with crises and to gain insights into tourism stakeholders' actual reactions at the destination during this unprecedented crisis, qualitative research was performed, entailing an interview with a person who was the head of both the Commerce and Tourism Department as well as the Business Assistance Centre at the Chamber of Commerce and Industry (CCI) of the Loire-Atlantique department on 22 April 2020. The semi-structured interview model was used since it gives the interviewer greater flexibility and the interviewees more opportunities to share facts about their experience. The interview questions were formulated in order to determine whether tourism policies at the destination were able to

cope with the current and future situation, which new policies could be implemented to best respond to the 'new normal' and which factors will influence them, and how collaboration has taken place during the crisis and will evolve subsequently.

10.4.1 Results and implications

The interview (personal communication, 2 April 2020) helped provide an insight into the reaction of the public sector and organisations responsible for tourism development and promotion in Loire-Atlantique in response to the COVID-19 global pandemic. The results mostly reveal that the crisis' exceptional and unprecedented characteristics have led to considerable uncertainty for the destination regarding how to cope with it.

The interviewee primarily emphasised the overall high level of collaboration among the various public agencies responsible for developing the economy and tourism and with the private sector at the destination, and the collaboration's importance. In fact, the main role of the Commerce and Tourism Department is to guide local businesses in their development, assist them in improving their performance and professionalism, and give them advice and trustworthy information. The Department also works with local and regional authorities responsible for urban and rural development and represents the private sector's interests in the decision-making. This collaboration has been a strength during the crisis but the difficulties in contacting partner organisations in the current circumstances have made the communication more complicated.

During the crisis, an emergency call-centre platform employing 40 agents has been activated to provide support to local businesses, inform them of the new governmental fiscal policy and measures regarding financing and human resources and answer their questions concerning the future in the best possible way. This plan was only once activated before, during the economic crisis of 2008, but has been reinforced to cope with the present crisis. Before the crisis, the Department was in charge of organising workshops and conferences on topics such as digitalisation, sustainable development and financing, and of individually or collectively assisting enterprises in the realisation of business diagnoses, for example. To prepare for the future, the CCI has developed two webinars aimed at businesses, tackling techniques to develop online sales and marketing, and strategies to recapture customers and attract new markets following the end of the lockdown. Moreover, the Pays de la Loire Regional Agency had launched the E-Tourism Academy prior to the crisis. The E-Tourism Academy offers webinars and tutorials to businesses, mostly on the themes of digitalisation and the development of successful web strategies, and is to organise a special webinar for tourism professionals during the crisis to help them start or develop their online markets. As a result of the strong demand of camping site owners and other tourism businesses, the CCI is considering organising a webinar on "barrier gestures" and sanitation measures for voluntary implementation by businesses in order to reinforce confidence and assure customer safety.

For instance, the interviewee identified several opportunities that could arise from the local entrepreneurs' ingenuity and capacity to innovate. The interviewee noted that many restaurants had started delivering food while other businesses were engaging in online sales and could hold onto these practices after the lockdown, even though before they might have been reluctant

concerning digitalisation. On the other hand, the interviewee mentioned that the Commerce and Tourism Department had collaborated with local authorities and producers in an emergency initiative aiming at selling perishable local produce through new distribution networks, which might remain in the long run.

As the destination's strategy was already mostly based on attracting domestic tourists from Paris and the neighbouring regions, and developing its tourism offer for higher-spending niche markets with special interests, such as bike, wine and watersports tourists, the interviewee believes this strategy will only be reinforced. However, other regions could start developing the same strategy and increase competition for a market that might be more limited after the crisis. Therefore, the interviewee pointed to the need for the local tourism offices to come together and market a diversified offer with a single voice and to investigate the new tourism behaviour and expectations of their visitors to adapt their strategy.

As regards price-cutting policies, the interviewee believed it might not be an appropriate strategy as that would mean cutting production costs and extra pressure on employees and businesses, and instead recommended that businesses focus on service quality and incentives to attract loyal customers, who are generally the first to return after a crisis.

Still, the interviewee insisted that long-term strategies are difficult to draft, even though the Department will be working with an audit firm to draw up some looking-forward scenarios and to imagine future solutions, given that the crisis is ongoing and its impacts are thus difficult to measure. The new strategies will depend on subsequent national policies and regulations, possible changes in tourist behaviour and (traveling) consumption patterns. The interviewee mentioned that future strategies and policies will also depend heavily on the socio-economic impacts brought by the crisis since many seasonal and vulnerable tourism businesses might disappear, more people will become unemployed, and the confinement may shift people's priorities for a while.

The implications arising from the interview in harmony with the literature review are that close collaboration between the public and private sector is crucial during a crisis. Further, a destination should focus on delivering a quality service in a safe and enjoyable environment and on increasing visitors' satisfaction over time, in order to create customer loyalty and greater confidence in the destination. In times of crisis, these customers tend to come back earlier than others. It also appears that diversifying the tourism offer will allow the destination to be less dependent on one target group, which could minimise the crisis' negative impacts. Namely, niche markets tend to stay longer and spend more money at the destination, which could compensate for the loss of a mass market. Since the interviewee mostly works for and with businesses, the involvement of local residents was not mentioned as relevant during the interview. Nevertheless, it is constantly demonstrated in the literature that collaboration with host communities is a key element in successful long-term development strategies and that its importance should not be underestimated.

Table 18: Policies suggested for Loire-Atlantique

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
National lockdown	Yes	Emergency measure aimed at containing the virus' spread, flattening the curve of infection to avoid congestion of the healthcare system and protect lives	The national government	<ul style="list-style-type: none"> - No. of new coronavirus cases - The death rate Impact on the economy: <ul style="list-style-type: none"> - GDP loss - Tourism revenue loss - The number of bankruptcies - Unemployment rate
Fiscal policy	Yes	<p>Debt deferment for due taxes, social solidarity contributions and charges, granting of interest-free loans to relieve pressure on businesses' finances, establish a solidarity fund for VMEs and independent workers, refund employees' wages</p> <p>Their objectives are to protect and ensure the socio-economic well-being of businesses and people, avoid massive bankruptcies, high unemployment rates and the collapse of the economy</p>	<ul style="list-style-type: none"> - The Ministry of the Economy and Finance - Banks - Regional councils - Municipalities 	<ul style="list-style-type: none"> - Public funds injected into the economy - Unemployment rates after the crisis - The number of bankruptcies after the crisis - Differences in consumption before and after the crisis
Promote local consumption	No	Campaigns to encourage consumers to buy local products in order to support local and national producers, avoid leakages and revive the economy	<p>The public sector (national, regional and local)</p> <ul style="list-style-type: none"> - Tourism organisations and businesses - Associations 	<ul style="list-style-type: none"> - The share of local consumption before and after the campaign - The share of leakages

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Increase collaboration among tourism stakeholders	Yes/No	Build more collaborative and communication networks among relevant tourism stakeholders to enhance unity against adversity, the sharing of consistent information, coordinated initiatives, sustainable development and reduce risks of counterproductive projects or initiatives at the destination	- The public sector and tourism organisations (but the initiative can also arise from - Businesses / Labour unions - Residents' associations - Associations ...)	- Successful projects that contribute to the development of sustainable tourism - Well-being and quality of life of residents at the destination - Economic well-being of the private sector - Linkages and level of trust between the public and the private sector
Improve service quality and innovation	Yes	Support tourism entrepreneurs in running their businesses, give advice and clear information, provide training, network-building opportunities, quality labels, and certifications to increase the destination's attractiveness and visitor satisfaction	- Local and regional tourism organisations - Local Chamber of Commerce and Industry - Audit firms - Businesses (in collaboration)	- Visitor satisfaction - Employee satisfaction with the training schemes - Tourists' willingness to repeat visit - Labels
Attract niche and domestic tourists	Yes	Develop/reinforce the tourism product and targeted marketing campaigns, improve collaboration with neighbouring regions in order to attract the optimal market group to the destination after the crisis	- Regional tourism development agency - Federations of municipalities (EPCI) - Tourism organisations and tourism offices (in collaboration with other sectors such as transportation, culture, territorial development...)	- Tourist arrivals - Tourist expenditures - Origins of the tourists - Presence in social media, tourism magazines, tourism fairs...

Source: Destination manager of Loire-Atlantique (personal communication, 2 April 2020); Own work.

10.4.2 Limitations

This study has several limitations. First, only one member of the various stakeholder groups was interviewed, which is not enough to draw firm conclusions from the results. Further, the interviewee was extremely busy with ongoing crisis management tasks and had little time to prepare for the interview and provide detailed answers. On the other hand, the CCI works mostly for the sake of businesses and thus the interviewee might be biased and their answers business-oriented. Another major limitation is that few policies are currently being implemented or planned on the local level, noting that destinations are still in the middle of the crisis and cannot assess its final impacts yet. Destinations are waiting for national policies to be adopted before reacting, but lack the confidence and experience in such exceptional circumstances to map out proactive strategies. Finally, given that an international pandemic occurring in such an interdependent and globalised world is unparalleled, while the literature can provide guidelines for crisis management it is unable to offer significant insight into the tourism and traveling behaviour responses to the global pandemic or into best practices. The lessons emerging from the COVID-19 crisis will most likely serve as a pool of knowledge for researchers to enrich the literature on crisis management and tourism policies and to establish stronger foundations for the development of a theoretical framework on the subject.

10.5 CONCLUSION

The purpose of this chapter was to better understand crisis management and the best practices in terms of tourism policy implementation in times of crisis. It has sought to analyse the reactions of a destination during the COVID-19 global pandemic through the policies and strategies the Loire-Atlantique department in France has implemented and plans to develop. The findings in this chapter can be compared with similar analyses in other destinations across the globe in order to delve into possible reactions by policymakers and tourism organisations. First, the literature on crisis management and tourism strategies and policies in times of crisis was reviewed, with a focus on health disasters. A short tourism evaluation of the destination of the Loire-Atlantique was then conducted through both a SWOT and importance-performance analysis so as to determine the type of destination and better formulate potential policies to be implemented to cope with the crisis in the short and long run. The interview with the head of the tourism development department at the local Chamber of Commerce and Industry helped confirm certain conclusions in the literature on crisis management, such as the importance of communication and tourism stakeholder collaboration in the crisis decision- and policy-making. The complexity of establishing a definite framework for policymaking in times of crisis has been acknowledged since the policies depend on many factors and vary greatly according to the type of destination and type of crisis. Another finding of this study is that planning crisis management and long-term recovery strategies for such an exceptional and global disaster still seem premature because similar previous experiences are lacking, and impact assessments cannot be conducted yet. However, Laws, Prideaux and Chon (2007) considered the impacts of a potential global pandemic and concluded that the recovery process might be very long and that strategies found to be useful in the past to recover tourism

demand will certainly not be effective if the whole global demand falls. Nonetheless, they also argue that eras of socio-economic well-being have followed major disasters and that this positive scenario might repeat and that the tourism sector might revive more rapidly and more strongly.

11 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN CRETE, GREECE

Christina Katsantoni

ABSTRACT

The outbreak of COVID-19 is gradually altering the international landscape and greatly affecting the tourism sector. Its length and consequences are currently unknown due to the continuous changes that make objective predictions impossible. COVID-19 has proven to be a huge challenge for several countries in the world, multiple industries, and national public health systems, also affecting societies and economies in unforeseen ways. The key to reducing the emerging negative impacts and ensuring the fastest recovery of different sectors and destinations from this crisis is effective management and strategically planned policies.

This chapter is based on a literature review while the insight provided by a tourism executive attempts to explore different policies that have been suggested and to illustrate their importance for the tourism sector in the current situation. The destination of Crete is selected for a deeper analysis of the crisis management and measures taken or proposed are studied. The importance of stakeholders' involvement in policymaking in a crisis and the significance of preparation for and dynamic handling of a crisis are underlined with the aim of protecting the tourism sector of a destination from the impacts a crisis can generate. Overall, this chapter assists with understanding tourism policymaking during the COVID-19 crisis and the measures suggested might provide valuable insights for policymakers and other stakeholders in destinations similar to Crete.

11.1 INTRODUCTION

The tourism industry has been confronting the enormous challenge brought by the outbreak of coronavirus disease 2019 (COVID-19) (IFITT, 2020). This new type of coronavirus emerged in the Hubei Province in China and then spread to various countries on all continents, forcing the WHO Emergency Committee to announce a global health emergency in January 2020 (Velavan & Meyer, 2020). Studies claim the pandemic will have a big impact on the tourism and travel sector since airplanes are grounded, while hotels and entire cities have been under lockdown (IFITT, 2020; Riley, 2020; Strielkowski, 2020). Another interesting point is that while travel is what initially enabled the spread of the virus on the international level (IFITT, 2020), the focus now should be on the management of this crisis and the creation of effective strategic policies to enhance the health systems and protect the economy and substantial sectors like tourism (Velavan & Meyer, 2020).

This chapter examines the impact of the COVID-19 crisis on the tourism sector and the creation of effective policies at the destination of Crete. Crete is in fifth place among the largest islands in the Mediterranean and is the biggest one located in Greece, comprising one of its regions. It is 260 kilometres long, offers a variety of landscapes including mountains and the sea, and is rich in history, culture, sun and gastronomy. Tourism is one of the main sectors contributing to the

economy of the island, accounting for 47% of the island's GDP. Tourism arrivals in Crete have grown rapidly by over 15% in the 5-year period before the pandemic (Association of Greek Tourism Enterprises, 2019). The main authority for tourism on the island is the administrative region.

The purpose of this chapter is to develop a clear understanding of the management of a crisis in relation to policymaking. Crisis management can be a useful tool to prepare, confront and recover from a crisis. Here, the researcher is trying to identify the most effective strategies and policies that are, will or could be implemented at a selected destination. To this end, the chapter is based on a literature review regarding tourism crises in the past, policymaking, and the valuable information gathered through an interview with a key tourism actor in Crete, which gives a deeper insight into the current situation and destination. The results refer to realistic goals and policy formation that could help deal with the present crisis.

11.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES ON CRETE

The tourism industry has been affected by multiple disasters and crises, ranging from nature-based to human-influenced occurrences. However, COVID-19 has impacted the industry and its actors in a wide range of ways that are still ongoing (Gössling, Scott & Hall, 2020; Sealy, 2020). To study the management of a crisis and the tourism strategies and policies which could be applied to Crete, past cases of other island destinations should be reviewed. Islands and island states can be quite vulnerable to crises, making effective collaboration among stakeholders and tourism authorities crucial for efficiently managing the situation. Further, the development of “a holistic framework that enables the leveraging of destination capitals and copes with any type of crisis” is encouraged for this type of destination (Boukas & Ziakas, 2013, p. 2).

An indicative case is Cyprus and its response to the global economic crisis of 2008 and the strategies it adopted, as in a way that could be similar to the pandemic crisis we are currently facing and that is impacting the economy and tourism sector. The most obvious impacts on Cypriot tourism due to the mentioned crisis were the destination becoming less competitive, declining tourism flows in terms of arrivals and receipts, a rapid rise in prices, and an insufficient tourism product (Boukas & Ziakas, 2013). Crisis management and policy creation were inevitably the tools for overcoming that crisis and bolstering the tourism industry. Initially, the strategy Cyprus adopted was diversification of its tourism product by developing facilities and promoting different types of tourism, while developing sustainable practices and other improving actions. Further, instant policies were released by the government that paused the need to include taxes in tourism services like accommodation or airport tickets and created a social tourism plan for the development of domestic tourism. Another type of policy measure concerned the attraction of foreign investment in tourism by promoting Cyprus as an appealing option for investments, providing support to investors interested and aiming to encourage improvements in the business environment (Boukas & Ziakas, 2013).

The effectiveness of the policies and measures taken can be ambivalent since even effective management cannot guarantee success while facing a crisis (WTTC, 2019a). Therefore, destinations should be ready beforehand to manage a crisis and also constantly monitor the situation. A comprehensive tourism planning framework that involves the cooperation of different stakeholders may prove ideal for crisis management in a small and highly touristic destination (Boukas & Ziakas, 2013). Research on small island economies such as the Fiji Islands that have previously undergone several major crises suggests that preparation, allocation of funding for future situations, control of international mobility, global assistance, and the provision of accurate information and support are the most significant tools for responding to a crisis as well as a focus on multiple sectors to avoid dependence on vulnerable ones like tourism (Mei & Hu, 2020; Singh et al., 2021).

11.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR CRETE

A situational analysis can be considered to be one of the first actions in connection to a strategic communication plan, where the analysis examines areas like the industry, its products or services, customers, competition and other elements regarding its operation (Daugherty, 2018). In this regard, essential information about Crete is shown in the table below. Crete is an island destination of 8,336 km² and is one of the regions of Greece. Its unique characteristics make it a popular destination that annually attracts more than 5 million tourists, a number that is eight times its population. The island is highly dependent on the tourism sector, and was experiencing ongoing growth in tourism arrivals before the outbreak of COVID-19.

Based on past performances in similar circumstances of a crisis, the general direction of the Cretan tourism market can be examined. For instance, in periods of crisis and low consumer confidence one may observe that travelling and tourism activities are limited for individuals and the business sector (Tileaga, Nitu & Nitu, 2015). Accordingly, it may be predicted that tourism demand across the island will drop. This could lead many enterprises in the tourism sector to shut down and to higher unemployment on the island due to the reliance of its economy on tourism.

Table 19: Basic indicators for Crete

Indicator	Crete
Area in km ²	8,336
Population (number)	634,930
Registered unemployment rate (%)	12
Tourism arrivals in 2019 (number)	5,287,557
Tourism arrivals growth 2019/2018 (%)	1.15
Nights spent (number)	43,256,170
Nights spent growth 2019/2018 (%)	-1.28

Sources: Association of Greek Tourism Enterprises (2018); Hellenic Statistical Authority. (n.d.).

11.3.1 SWOT analysis for Crete in light of the COVID-19 crisis

A SWOT analysis can help in choosing the appropriate strategy and in this case for dealing with the crisis (Gürel, 2017). Identifying the strengths and weaknesses of the destination in this situation can assist in finding Crete's sources of competitive advantage as a destination while awareness of the opportunities and threats of the crisis may offer insight into the tourism competition. The analysis of strengths, weaknesses, opportunities and threats for Crete is shown in the figure below with the presented points being based on the author's knowledge of the destination and the recommendations that emerged during the interview with the destination manager that focused on the COVID-19 situation.

Crete's most advantageous elements are connected to its characteristics and tourism growth revealing its popularity, as already described, as well as to the quality tourism product provided. However, as pointed out by the Confederation of Greek Tourism (INSETE) (2015) the region suffers from serious weaknesses that can affect the tourism development. Further, opportunities for the island in the current situation mostly originate from the country's appropriate response to the pandemic. Nevertheless, the impacts of COVID-19 on tourism and the effects of the financial crisis of 2008 still pose considerable threats (Bamias et al., 2020).

Figure 19: SWOT analysis for Crete

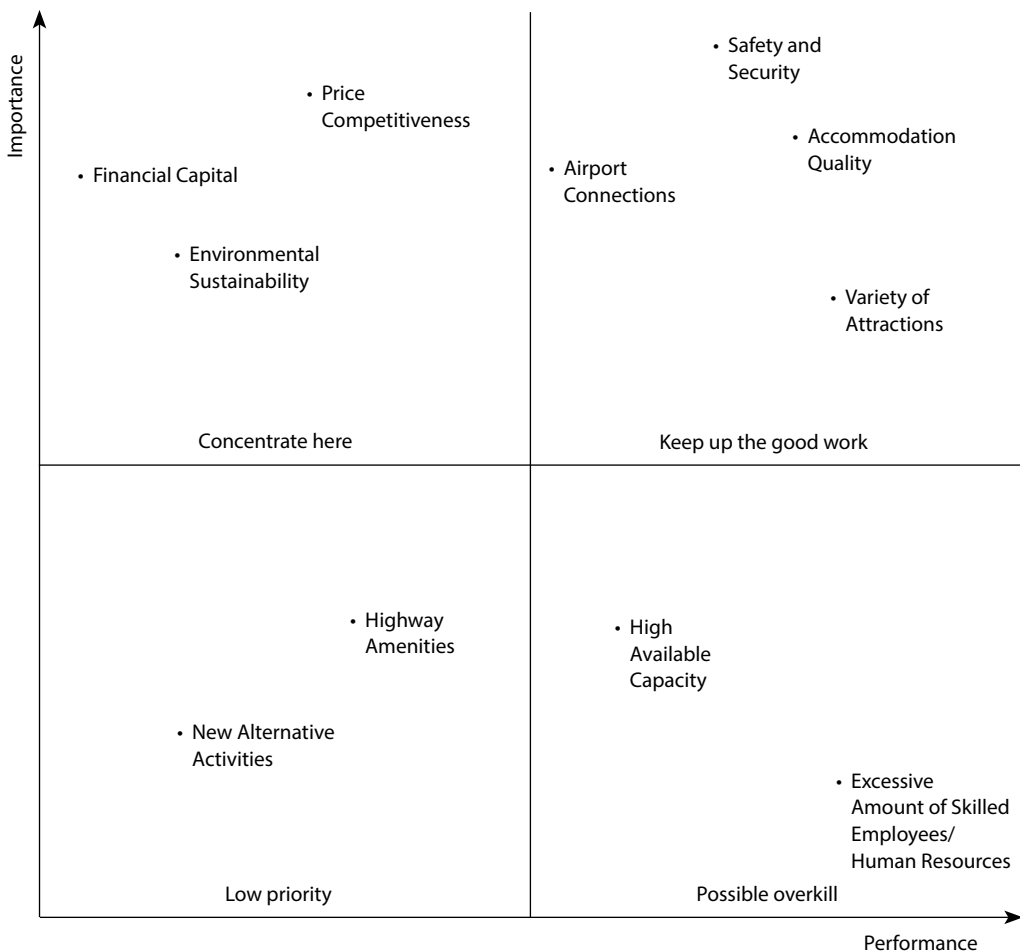
Strengths	Weaknesses
<ul style="list-style-type: none"> › Strong tourism product/experience (culture, accommodation, products, quality etc.) › Availability of an excellent coast, a wide range of natural attractions, unique historical and archaeological attractions, wonderful climate › High levels of reputation, tourist satisfaction, brand name 	<ul style="list-style-type: none"> › Transport to the destination can be expensive due to geographical location › Poor public facilities, infrastructure (e.g. hospitals) in the southern part of the island and a feeling of insecurity › Lack of crisis management, difficulties in applying regulations
Opportunities	Threats
<ul style="list-style-type: none"> › Narrower health crisis than in other Mediterranean markets › Expansion of the tourism product: gastronomy, sustainable development, thematic tourism etc. › Domestic tourism growth › Reduction of an excessive number of tourists, the effort to spread tourism across different seasons › Exploitation of new markets 	<ul style="list-style-type: none"> › Still affected by the financial crisis, lack of funds for campaigns and development › COVID-19 crisis affecting all potential customers › Quality of the tourism product might be impacted › Strong competition › Lack of trading policy

Source: Destination Manager of Crete (personal communication, 2 April 2020); Own work.

11.3.2 Importance-performance analysis for Crete during the COVID-19 crisis

An importance-performance analysis is a practical method for use in policymaking as it portrays the allocation of different elements regarding their importance and user satisfaction (Ormanović et al., 2017). In this case, some characteristics of the Cretan tourism sector are presented in connection to their significance and performance, paying regard to the crisis that tourism is encountering. The elements indicated were discussed during the interview and are based on the interviewee’s perspective and the disclosed future strategies which the region considers significant and deserving of further focus in the post-COVID-19 era. The figure below presents the analysis.

Figure 20: Importance-performance analysis for Crete



Source: Own work.

11.4 EMPIRICAL RESEARCH

The examination of the COVID-19 crisis and the strategic measures introduced at the destination of Crete is based on empirical research. The results and implications of this chapter arise from the information collected through an interview with the destination manager of Crete (personal communication, 2 April 2020). During the interview, different policies were suggested and analysed in relation to the destination and management of the virus-triggered crisis and overall insight was achieved in terms of the planning of policies in the destination. It should be noted that the aspects elaborated are based on the interviewee's perception at the time of the interview and some points are deduced through the communication since the interviewee chose not to strictly follow the structure of the research questions.

11.4.1 Results and implications

The results of this research suggest Crete as a region was not ready for a health crisis of such an extent and the whole country is still lacking in strategy policy and crisis management preparation. Tourism has been and will remain particularly affected, although there may be some promising aspects that require effort and effective strategic planning.

Crete can even now be considered a strong destination as it has a good reputation as concerns tourism satisfaction and has managed to create a brand name. The remarkable coast of more than 1,000 kilometres, pleasant locations, multiple attractions, excellent climate and the rich culture/history in connection to tourism experiences and service add to the destination's appeal. On the other hand, the lack of planning for crisis management and the poor infrastructure in some areas of the island might work as negative factors with respect to a potential visitor's feeling of security and decision-making in the current circumstances. Further, the unavoidable use of air or water transport might be a drawback, especially due to the risks presently faced by airlines at the moment (Destination manager of Crete, personal communication, 2 April 2020).

Still, there are many aspects that Crete as a tourism destination can take advantage of right now. The crisis can be seen as an opportunity to expand the tourism product, focus on new markets and travel segments, sustainably develop the destination, particularly in the beneficial circumstances of the Mediterranean compared to the condition of other destinations. In this manner, a strong tourism strategy could yield encouraging results and tourism flows although it should not be forgotten that the competition can still be harsh, the financial support for Crete is limited and the target markets are also affected by the crisis economically and socially (Destination manager of Crete, personal communication, 2 April 2020).

Strategic policies in relation to tourism must take account of the destination's advantages, drawbacks, opportunities and threats in order to effectively overcome COVID-19 or any other crisis. Nevertheless, this cannot be achieved without the involvement and efficient collaboration of all stakeholders in the tourism sector. In Crete, all of the groups of stakeholders are trying to communicate the problems they are facing now and their concerns for the future. At this difficult moment when the crisis seems to be approaching its peak, individual stakeholders are

not powerful enough to participate in the creation of policy, meaning the elected representatives are their voices. Yet, once the crisis ends the involvement of every single stakeholder will be very important. Government, the tourism ministry and its departments, hotels, banks, suppliers, and citizens must collaborate and try to create a unique experience for tourists that will result in loyalty. A collective effort to address the challenges and ensure that no one is mistreated and all are benefited or harmed the least is the key both during and after this situation (Destination manager of Crete, personal communication, 2 April 2020).

In spite of the complexity and dynamics behind the relationships and communication of all the different stakeholders, the policymaking in Greece is proceeding really well. According to the mentioned interview (personal communication, 2 April 2020), the government – namely, the main entity for policy enforcement and implementation – has been acting quickly and very efficiently, quite an unlikely outcome in other circumstances. The strategies formed might be responsive but the efficiency and speed of the policymaking are ensuring the economy is harmed the least possible. The stakeholders and different regions in Greece have agreed on a collective tourism strategy for the whole country, with minor differentiation based on each destination's characteristics only to take place after this situation is over. The majority of the policies suggested for Crete are included in the table below.

The policies already in place on Crete as well as the new ones currently planned to be implemented after the crisis seem suitable for the majority of tourism actors on the island. The lockdown of the island during the first wave of the epidemic and the actions affecting the tourism sector mostly concern workers and the survival of enterprises. Before the health crisis became a reality, there was no provision of the suggested policies. Nonetheless, the planning of tourism policies for the destination's future is impressive and entails multiple measures and suggestions for the quick recovery of tourism arrivals, focussing on specific foreign markets as well as the domestic market, attempting to spread tourism across the whole year, the creation of a sense of safety, an increase in tourism spending, enhancement of different types of tourism, competitive prices and the creation of a more anthropocentric relationship with tourists.

Some examples of the policies suggested for dealing with and recovering from the crisis in the region of Crete are the following: To create a tourism campaign that concentrates on the domestic market and strategic communication for specific countries that are not particularly negatively affected by the coronavirus outbreak, like (at the time of writing) Russia, Poland, Israel and the Scandinavian countries; To reduce tax in connection to tourism expenditures and tourism packages for both Greeks and foreign tourists; to concentrate on new travel segments and new types of tourism and events as a way of further expanding aspects of the tourism product; to provide incentives to encourage customers not to cancel their plans but to postpone them for a while; and to cooperate with external tourism stakeholders like airlines and online travel agents (OTA) with the aim of expanding tourism until December.

Policy development can be affected by multiple factors when referring to a crisis at a tourism destination. According to the mentioned interview (personal communication, 2 April 2020), three main dimensions can impact the strategies created. These are the health and sanitary, the

economic and the social dimensions. Given that at the moment the virus still exists, the health dimension is the one with the greatest effect on policies. The limited knowledge regarding the virus coupled with the length and outcomes of the situation are now in the spotlight and anything that occurs regarding these features can affect and alter the policymaking. The economic dimension comes second followed by the social one. Still, with the end of the situation the relative importance of these dimensions will probably change. The economy will most likely take the leading role and influence the strategic plans. Later on, the social element will start to gain ground and the actions will primarily take it into account. Tourism might also need to adjust to the new perspectives, not only in Crete but in the majority of destinations on the international level (Destination manager of Crete, personal communication, 2 April 2020).

Table 20: Policies suggested for Crete

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Financial help to employees and enterprises	Yes	To ensure the survival of enterprises and assistance to employees not receiving their salary	The Greek government	The unemployment rate
Strategic communication with a focus on specific target countries (e.g., Russia, Poland, Scandinavia, Israel etc.)	No	Attract tourists from countries that were not hit hard by the crisis in order to restore tourism faster and create a feeling of security and safety for tourists	The Greek government The Cretan Tourism Council	Statistics on tourism arrivals from the specific markets for the second half of the year
A tourism campaign for the domestic market	No	Encourage domestic tourism	The Greek government The Cretan Tourism Council	Statistics on tourism arrivals from the domestic market for the second half of the year
Organise/attract conferences and big events in Crete	No	Enhance alternative types of tourism, attract more types of tourists and compensate for the losses of cancelled events	The Greek government The Cretan Tourism Council	Existing infrastructure and statistics on tourism arrivals for conference tourism for the second half of the year
Focus on the different advantages (sun, products, gastronomy) of the destination	No	Spread tourism across the whole year	The Greek government The Cretan Tourism Council	Monthly statistics on tourism arrivals

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Focus on different tourism segments – luxury tourism	No	Recover the economic losses faster and increase tourist spending	The Greek government The Cretan Tourism Council	Statistics on tourism receipts for the second half of the year
Provision of incentives for postponing (not cancelling) reservations during the pandemic outbreak	No	Encourage tourists to visit Crete after the crisis and create a relationship with the customer	The Greek government The Cretan Tourism Council	Statistics on the number of cancellations in the region
Tourism packages for locals and tourists	No	Encourage domestic tourism and attract tourists fast with competitive prices	The Greek government The Cretan Tourism Council	Percentage of tourism arrivals due to packages and the feasibility of certain packages
Tax reduction in airports and for other travel expenses	No	Attract tourism arrivals and enable more people to travel	The Greek government The Cretan Tourism Council	Statistics on tourism arrivals while the measure is in place and adequate cash flows in the country's economy
Cooperation with airlines, OTAs, tour operators for the period October–December.	No	Expand the season and spread tourism across the whole year	The Greek government The Cretan Tourism Council	Availability of all actors involved and statistics on tourism arrivals for this period

Source: Destination manager of Crete (personal communication, 2 April 2020).

11.4.2 Limitations

This chapter presents a general understanding of crisis management and policy creation at a destination during the COVID-19 outbreak. However, it is noted that the scope of the research is quite limited since the situation of the COVID-19 pandemic is relatively new and its impacts have not yet crystallised. The academic literature on aspects of the coronavirus is not presently extensive and cannot fully support research. For this reason, the current research is also based on other sources like news articles and other trustworthy publications. Nevertheless, this may still not be enough since the situation is constantly changing and expanding and the impacts and duration

of the crisis are hard to predict. Moreover, it is the first time the world has faced a pandemic with such strong effects, which means that it must be considered that similar previous research focused on situations of a smaller extent.

In addition, this chapter was produced within a restricted period of time and hence concentrates only on specific aspects of the crisis that might be altered in the near future. Longer-term observations of the destination described also need to be included since the full picture of the circumstances at the destination still has to emerge. Another limitation of the results presented in this chapter is that the information concerning the destination and policies created is based on a very narrow sample. This may be justified since the current situation calls for long hours of work by those holding managerial positions in tourism entities who the research sought to interview. While the perspective we managed to acquire may be valuable, further research is needed after this international health crisis is over.

11.5 CONCLUSION

The creation of effective tourism policies is crucial for all tourism destinations during the COVID-19 pandemic in order to manage the crisis and recover from it. Crete is a tourism destination with great potential and opportunities to develop even further. However, the lack of preparation for a crisis may be considered as a serious matter in this or even future cases. One positive aspect is that strategic policies were able to be formulated for the island soon after the virus' emergence and the implementation of the initial measures was rapid. The collaboration of the stakeholders contributed significantly to the creation of strategies that seek to ensure that after the crisis tourism at the destination will continue to be an important activity for the island's economy. Another important aspect is that the actions connected to these strategies include ways aimed at assuring the crisis will bring the least negative impacts to all actors in tourism. Yet the success of such strategies certainly requires that every individual involved is aware of the value and extent of this crisis. Unfortunately, even though the policies have been designed to bring the most desirable results and regenerate tourism on Crete, their actual effectiveness remains uncertain due to the unstable conditions and unknown outcomes of the present crisis.

The mentioned crisis could awaken tourism destinations in relation to multiple aspects like the product they are offering, quality, customer relationships, opportunities to expand to different markets and, eventually, sustainable tourism development. A crisis can be a threat especially when destinations are unprepared for it, yet can also act as a green light for major changes that positively affect the destination's future and the quality of life of its inhabitants and ensure prosperity for all parties involved. The COVID-19 outbreak started as a health crisis but is already affecting the economy and gradually the social environment. It is inevitable that things will not be the same once the crisis ends but the hope is that correct planning in tourism can combat the worst scenarios. During the current situation what may prove to be of the utmost importance is the collaboration of all tourism stakeholders at a destination together with the international-level cooperation of destinations and tourism organisations so that ideas could be exchanged from

different perspectives and the most effective policies adopted while considering the specific features of each destination. The tourism sector could thereby perhaps be affected less than expected and traveling could be restored soon for everyone.

12 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN GORIŠKA BRDA, SLOVENIA

Sara Mavrič

ABSTRACT

The global interconnectedness of the tourism industry means it is more vulnerable to crisis episodes. The uncertainty and unpredictability of crises makes it difficult for the tourism industry to react accordingly. Crises cannot be stopped, yet the right approach and implementation of suitable strategies and policies can ease the negative impacts and help with the destination's recovery following a crisis. The destination analysed in this study is the Slovenian region of Goriška Brda, a rural area known for producing wine and beautiful landscapes. The aim of the research was to investigate how the destination has coped during the COVID-19 crisis, the policies implemented, the impact on all stakeholders in tourism and what influences the policymaking at the destination. Moreover, observations are made of the implemented policies' effectiveness and the adaptation to the changes. The focus of the research was the COVID-19 outbreak and its impact on tourism stakeholders and policymaking. Most of the policies and strategies the researchers proposed for the destination were given support by the interviewee, the manager of the Destination Management Organisation (DMO). The destination responded quickly to the crisis. A lot of measures and policies had already been implemented and discussed. The main stress is on collaboration, communication and support within the tourism sector and the local community, the availability of financial help for private tourism businesses, marketing and communication as concerns regular and potential visitors, an orientation to domestic tourism and taking advantage of the possibility to emphasise the area's nature-based tourism. In the current situation, collaboration, the distribution of information, responsiveness, and maintaining visibility are essential for the DMO and all other stakeholders involved to ensure appropriate strategies are in place to cope with the crisis.

12.1 INTRODUCTION

Rural tourism destinations have been becoming popular among travellers (IGI Global, n.d.). The same goes for Goriška Brda (in brief: Brda), a hilly region in western Slovenia. It attracts wine enthusiasts, bikers, hikers and nature lovers. Its green landscapes are a wonderful location for people to relax, do sports in nature, and enjoy the local wine and culinary offer as well as the cultural and natural heritage. Many guests come for different gastronomic and cultural events, some of which have become annual. In recent years, the region has become a popular wedding destination and MICE tourism has also gained in importance.

Like all economic activities, the tourism industry is strongly challenged by negative events that occur unpredictably (Glaesser, 2006). Similarly, like most destinations around the world, tourism in Goriška Brda has been affected by the COVID-19 crisis. The aim of this chapter is to outline and identify the policies and strategies in place and planned which the destination has adopted or

should adopt with a view to the recovery and re-establishment as well as minimising the negative impacts of the ongoing COVID-19 crisis. While crises cannot be stopped, the right approach, strategies and policies can limit their negative effects and enable a destination to recover from the crisis quicker and maintain or even improve its competitive position (Bonn & Rundle-Thiele, 2007; Bremser, Alonso-Almeida & Llach, 2017; Giannopoulou, 2019). Changes in policy and ongoing crisis management actions can also bring benefits for future prevention and reactions to potential crises (Ritchie, 2004).

Following the introduction, a literature review on crises in tourism, crisis management as well as the strategies and policies used in tourism is presented and applied to rural tourism destinations. The destination Goriška Brda and its main characteristics are then described. Next, selected policies for coping with the crisis at the destination are suggested, summarised and elaborated for the stakeholders involved. Empirical research is supported with an interview with the manager of the Destination Management Organisation (DMO). The results, implications and limitations of the study are then presented. Finally, a summary of the findings and concluding remarks are provided in the conclusion.

12.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN GORIŠKA BRDA

The constant growth of tourism and interconnectedness of the global economy mean crises are becoming ever more frequent while their negative impacts are increasing as well (Hall, 2010; Giannopoulou, 2019). As Beirman (2003) stated, »no tourism destination is immune from crisis«, so it is important that tourism destinations and businesses are prepared to deal for such situations (Beirman, 2003; Santana, 2004). It is clear that rural areas also encounter all types of crises. More frequent ones are crises related to the environment (e.g. earthquake, avalanche, flood etc.). Further, health-related crises, such as a pandemic, are wider in scope and it is difficult to prevent their consequences, even in rural areas. The tourism industry's global interconnectedness makes it hard for a destination to avoid a crisis, especially one that hits international travel and where safety is an issue. Namely, with the tourism industry being hit by such a crisis, people are unable to travel to their desired destination; also, destinations not suffering directly can still feel the indirect consequences.

Crisis management is an important component of tourism destination management and every tourism-related company. It consists of strategies and processes put in place to help understand, prevent and effectively manage a crisis as well as reduce the impacts on the destination and support its recovery (Santana, 2004; COMCEC, 2017; Ritchie, 2014). The management of a crisis should include all stakeholders involved and influenced by the consequences of the crisis (Giannopoulou, 2019). In rural areas, Destination Management Organisations (DMOs) or the authorities responsible for developing tourism need to communicate and collaborate with private tourism entities as well as local residents directly or indirectly affected by tourism to formulate strategies and policies to minimise the crisis' negative impacts (Ritchie, 2004; Jóhannesson & Huijbens, 2010; COMCEC, 2017; Giannopoulou, 2019).

In the times of crisis, while it is necessary for actors in tourism to react coherently independent tourism businesses do not always cooperate and thus develop their own responses to cope with the situation. The main role of the DMO is thus to motivate private tourism providers to participate in joint actions. Some of the most successful strategies include proactive measures like increased marketing, new product development and strengthening the destination's competitive position and advantages (Semerciöz et al., 2015; COMCEC, 2017; Giannopoulou, 2019). After the crisis, apart from the efforts to actively rebuild the tourism industry it is important to prioritise the goal of becoming more resilient and sustainable for future long-term development (OECD, 2020c).

12.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR GORIŠKA BRDA

The region of Goriška Brda has been well developing every aspect over the past few years. The tourism sector has also been growing and enjoying positive trends. The number of tourist overnight stays rose significantly from 2014 (25,500) to 2019 (43,738). The most important markets are the domestic Slovenian one, followed by the Austrian, Italian and German markets. In more recent years, the destination has also become more popular for Dutch, Belgian and American tourists, among others (Destination manager of the Goriška Brda DMO, personal communication, 5 April 2020).

Goriška Brda's successful development is also reflected in awards received in recent years. In 2015, the destination was a European Destination of Excellence (ZTKMŠ Brda, 2015). In 2019, the region was given the Slovenia Green Destination Gold award. The destination has put a lot of effort into sustainable development over the last few years. The offer has also been extended throughout the year to decrease the seasonality and tourist providers are being encouraged to become involved in international sustainable development schemes. The destination was recognised as one of the top 100 sustainable destinations in the world – Green destinations (Občina Brda, 2019). Some basic information about the destination and indicators are presented in the table below.

Table 21: Basic indicators for Goriška Brda

Indicator	Goriška Brda
Area in km ²	72
Population (number)	5,632
Registered unemployment rate (%)	4.7
Tourism arrivals in 2019 (number)	27,188
Tourism arrivals growth 2019/2018 (%)	9.85
Nights spent 2019 (number)	43,738
Nights spent growth 2019/2018 (%)	9.36

Sources: Manager of the Goriška Brda DMO (personal communication, 5 April 2020); SiStat (n.d.).

12.3.1 SWOT analysis for Goriška Brda in light of the COVID-19 crisis

A SWOT analysis was undertaken for the purpose of identifying strengths and weaknesses that policymakers at the destination should consider while planning the development of tourism and also coping with the COVID-19 crisis. In addition, challenges and threats posed by the external environment to the destination were defined. The analysis of strengths, weaknesses, opportunities and threats for Goriška Brda, presented in the figure below, is based on the author's knowledge of the destination and the interview with the manager of the DMO.

Goriška Brda is a rural area that is not densely populated, allowing visitors considerable space to move around the natural environment. Moreover, the destination does not attract mass tourism and is instead more focused on boutique tourism. On the other hand, although tourists have good access to nature, they do not necessarily have to spend anything on their visit, which may not be good for the local providers. One challenge for the destination may be its heavy dependence on Italian guests given that the region borders with Italy. Nevertheless, the destination is recognised by domestic tourists and concentrating on Slovenian travellers may be a good way of revitalising tourism. As the crisis is unpredictable, it remains unclear when tourism businesses can start operating as normal. The restrictions and special measures could stay in place for a longer time whereas people's willingness to travel is also in question. Like in many states, the Slovenian government has promised support to the tourism industry, which might constitute a lifeline for many tourism providers at the destination.

Figure 21: SWOT analysis for Goriška Brda

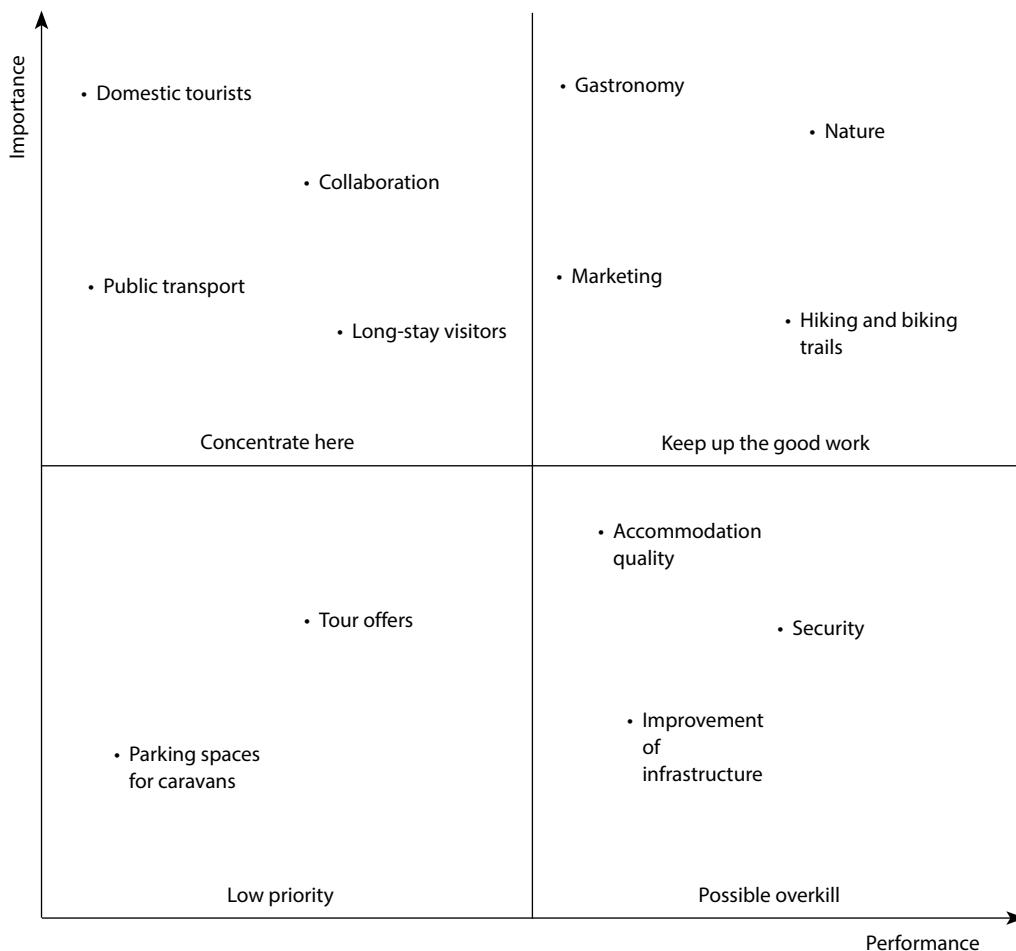
Strengths	Weaknesses
<ul style="list-style-type: none"> › Countryside, rural area › Not densely populated › No mass tourism › Recognised by domestic tourists › Nature – ability to freely move in the natural environment without coming into contact with many people 	<ul style="list-style-type: none"> › Italy is across the border › Heavy reliance on Italian tourists (especially restaurants) › Access to nature is free – people do not need to spend anything on their visit
Opportunities	Threats
<ul style="list-style-type: none"> › Self-care of the local inhabitants › Domestic tourism › Slovenia's attractiveness as a tourist destination › Government/municipal funds for the tourism providers 	<ul style="list-style-type: none"> › Enduring followed by a recession › Regulations and restrictions that do not allow normal operations › Prohibition on events with large gatherings › No cooperation among tourism providers › People's unwillingness to travel

Source: Own work.

12.3.2 Importance-performance analysis for Goriška Brda during the COVID-19 crisis

The figure below presents importance-performance analysis for the destination under consideration. The chosen factors were seen as important for the destination already before the arrival of the pandemic and the shock caused to tourism (Manager of the Goriška Brda DMO, personal communication, 5 April 2020). These factors are categorised in terms of the importance and performance they would have today in times of the crisis and thereafter.

Figure 22: Importance-performance analysis for Goriška Brda



Source: Own work.

12.4 EMPIRICAL RESEARCH

The results and implications are based on the findings of the mentioned in-depth interview with the manager of the Goriška Brda DMO (personal communication, 5 April 2020). Building on the overview of the literature and analysis of the situation at Goriška Brda, the author identified policies that should be applied at the destination to cope with the COVID-19 crisis. The recommended and already implemented policies were discussed with the destination manager, who provided the overall picture of the actions taken and planned to ensure a good response to the situation.

12.4.1 Results and implications

Goriška Brda is recognisable as a destination for agriculture, tourism and culture. Its somewhat isolated location along the border of the country has been seen as a weakness in the past but has turned into a strength. The destination manager perceived it as potential and an opportunity to adapt faster to the current situation and measures introduced during the COVID-19 crisis and thereafter. The near vicinity of Italy and the situation there made the authorities at the destination react quicker to the crisis than elsewhere in Slovenia. The destination manager believed the COVID-19 crisis will affect the destination. However, she stressed the target group might be less financially sensitive (higher social status), meaning the financial aspect might prove less of a burden after the crisis is over. Further, the strong bonds among the destination's stakeholders, which have gained importance in recent years, will make it easier for the destination to address the crisis and recover from it (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

Together with the municipality and other tourism stakeholders, the DMO is already working on the implementation of new tourism policies during the crisis and on activities with a view to the post-COVID-19 era. A quick and appropriate response to the circumstances is extremely important. »A well-organised community will certainly adapt more quickly, and I can emphasise for Brda that we are a well-organised community«, the destination manager said while pointing to the importance of collaboration and well-organised activities at the destination. Efficient communication among all stakeholders will play a valuable role. Further, the destination manager stressed that marketing during and after the crisis will be essential. "Maintaining visibility, building loyalty" is the motto they wish to keep active in marketing in these times in order to stay recognised among potential visitors (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

The policies currently in place are appropriate and well-defined: the municipality and municipal administration provide information and prompt action in communication and policies related to the population and infrastructure. In tourism, they have adapted quickly and started with targeted promotional activities that seek to increase the providers' visibility and the basic offer of the destination. They are adapting to the present circumstances and taking care that everybody is informed, even the financial organisation of the whole destination had to be adapted to the situation since there is less or even no revenue from tourism at the moment (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

In many respects, as a municipality the destination was among the first to respond to the COVID-19 crisis and actively participate in action and information for the local inhabitants. The policies recommended by the researcher have been recognised by representatives of the destination itself as appropriate. The stakeholders at the destination agree that collaboration, communication and support within the tourism sector and local community will play an important role in the crisis as well as in the recovery after it. In addition, some government measures to help tourism businesses and the sector itself have already been promised. Slovenian destinations have offered suggestions for the government to help tourism overcome the liquidity problems. Maintaining visibility with marketing activities and communication with potential and regular customers will be essential for keeping up their loyalty and desire to visit following the crisis. Many destinations will focus on promoting themselves in the domestic market and Brda will be no exception. The Slovenian Tourist Board organises joint promotions for domestic tourism. Further, the recommendations for government policies go in the direction of introducing vouchers for visiting domestic destinations as well as an appeal to schools to organise excursions in Slovenia. Finally, the promotion of nature-based tourism, with activities like biking and hiking, is considered to be a potential advantage of the destination and will be given due consideration in the current and future policies (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

The main factors influence the policymaking at the moment are health security and the financial aspect. The DMO manager believed these two factors will be the most important in the post-crisis period as well (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

Cooperation among all institutions was already established before COVID-19 arrived. The links among tourism stakeholders and everyone involved will certainly be further strengthened during and after the pandemic. As the DMO manager stated: “connected destinations will certainly have more positive and faster effects and results”. The municipality and the DMO are informing all tourism stakeholders of the measures taken, while they are also in touch with other destinations in Slovenia to collaborate on joint solutions for tourism. There is close cooperation among all key providers and players on the local level, between the Municipality and the DMO, between the DMOs of individual destinations, with the Ministry of Economic Development and Technology as well as the Slovenian Tourist Board (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

The policies, strategies, responsible institutions, and indicators recognised by the destination are presented in the table below. The current actions at the destination related to the recommended policies are as follows:

- › POLICY 1: Collaboration, communication and support within the tourism sector and the local community

The collaboration of stakeholders at the destination is crucial for a good response to the crisis and the destination’s revitalisation. The DMO as the primary organisation for the development and promotion of tourism has accepted the main role and will bring

all the tourism stakeholders together to cooperate on common problem-solving. Good communication and actions towards common goals will facilitate the recovery from the crisis.

› POLICY 2: Funds for private tourism businesses

The destination manager agrees that the tourism sector is and will be one of the most affected by the crisis. In her opinion, the measures taken by the local authorities are good. On the country level, discussions of the measures to help reduce the crisis' negative impacts are underway with the Ministry of Economic Development and Technology and the Slovenian Tourist Board.

› POLICY 3: Promotion, marketing and communication with regular and potential visitors

The DMO has started with new promotional activities (on social media) aimed at different segments of tourists. The DMO manager emphasised that the fact that Brda is developing boutique tourism makes it easier to communicate to target groups of tourists. Great emphasis is put on communication with both potential and regular customers. The destination has also adopted the 'stay home' campaign, inviting travellers to come when the crisis is over and keeping them informed about the situation. The providers remain in touch with their regular guests, which is important in the current situation.

› POLICY 4: Domestic tourism

The DMO manager agrees that domestic tourism will grow in importance following the crisis. New ways of marketing the destination are being prepared and some products are being enriched. The fact that Brda is recognised by Slovenian tourists and one-day visitors is encouraging. Moreover, despite many foreign tourists visiting in the last couple of years, 40% of overnight stays have still been made by Slovenian guests.

› POLICY 5: Nature-based sustainable tourism

The DMO manager believes that those types of tourism being developed in Brda based on active leisure time among nature, the non-massive tourism, dispersed heritage and tourism infrastructure will help with the destination's faster recovery. According to her, "maybe we will recover faster than destinations that have mass tourism". The characteristics of the landscape, nature-based tourism and sports activities, such as biking and hiking, are among the main pillars of tourism in Brda. They have already taken action and started to improve and enrich the offer (Manager of the Goriška Brda DMO, personal communication, 5 April 2020).

Table 22: Policies suggested for Goriška Brda

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Collaboration, communication and support within the tourism sector and the local community	Yes	Collaboration involving the DMO, private tourism entities and local inhabitants	All stakeholders	Stakeholder involvement
				Satisfaction of local residents
	Yes	Joint problem-solving	All stakeholders	Stakeholder satisfaction
				Cohesion of the measures taken
	Yes	Providing tourism businesses with important information during the crisis (e.g. how to obtain funds and financial support, how to operate etc.)	Government, Municipality, DMO	Communication efficiency
				The up-to-datedness of tourism providers
Funds for private tourism businesses	No	Provide financial support for tourism businesses to compensate for the loss and to operate	Government, Slovenian Tourist Board, Municipality	The existence of a financial strategy
				The availability of funds for recovery and further development
	No	Redirection of the EU funds into investments that would help tourism businesses to re-start	Government, Municipality	The amount of money dedicated to investments to re-start the sector
				The availability and accessibility of funds
	No	Adaptation of the credits and loans for the tourism sector and facilitation of tax payments	Government	A decrease in taxes
				Measures to facilitate the paying back of credit/loans
Promotion, marketing and communication with regular and potential visitors	Yes	Intensive marketing on social media (during and after the crisis)	DMO, tourism providers	The number of posts on social media channels
				Responsiveness of the audience
	Yes	Communicate the circumstances and situation at the destination	Municipality, DMO, private tourism entities	The existence of information about the situation at the destination
Yes	Keep contact with regular guests	Tourism providers	No. of regular guests returning to the destination after crisis	

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Domestic tourism	No	Introduction of special offers for domestic tourists – holiday vouchers	Tourism providers, DMO, STB	The existence of special offers
	Yes	Appeal to citizens to visit tourist destinations in their home country	Government, STB, DMO	Marketing campaigns to promote domestic tourism
				The number of domestic tourists visiting destinations in home country
No	Appeal to schools to organise excursions within Slovenia	Government	The number of trips and excursions to home destinations organised by schools	
Nature-based sustainable tourism	Yes	Promote natural features and possibilities of doing sports in nature	DMO, tourism providers	Presence and emphasis on nature in promotional materials
	Yes	Development of new products/services related to nature	DMO, tourism providers	The number of new products on offer
				Innovativeness of tourism providers
No	Support for DMOs that will stimulate destinations to achieve more sustainable development	Government	The availability of funds for sustainable development	
				The existence of the government's support action

Source: Manager of the Goriška Brda DMO (personal communication, 5 April 2020).

12.4.2 Limitations

The uncertainty of the current situation means this study suffers from several limitations. The study was conducted between 23 March and 7 April 2020. The conditions continue to change daily and it is difficult to predict for how long the crisis will last and how the world will be after it. Since the situation is in a constant state of flux, it is hard to follow and encompass all of the information emerging about COVID-19. Information received today might be outdated tomorrow. Accordingly, at the time of writing one could not find many academic articles about the COVID-19 crisis and thus the information concerning the situation published on different websites must be critically assessed.

The destination analysed in this study has not suffered from any such crisis recently. There has been no similar pandemic outbreak in the last few decades, making it difficult to identify another destination that has experienced a comparable crisis such as, for example, the outbreak of SARS. In any event, applying policies and strategies used in other destinations is not always relevant and it proves challenging to identify policies that are equally effective as they turned out to be elsewhere. Each destination is special in its own way and must adapt to such a crisis according to its abilities and characteristics so as to recover in the best and fastest way possible.

Times of crisis demand that managers of DMOs stay alert and have lots of meetings and other work obligations. This means it is difficult to reach them and obtain all the information required. Further, subjectivism cannot always be avoided while researching a destination that one knows. The researcher holds prior knowledge about the destination, which may have led to a different approach to the study.

Another limitation on the research was the time constraint, which did not allow a deeper investigation of other tourism stakeholders and their opinions concerning the measures and policies they believe are the most essential and appropriate for dealing with the crisis as well as to further expand on how they are facing the current situation.

12.5 CONCLUSION

Crises that occur unpredictably can pose a threat to the entire world. The tourism industry connects all parts of the world and is therefore even more vulnerable to the effects of such events. The current COVID-19 pandemic has already caused considerable damage to tourism businesses and clearly calls for well-considered policies and strategies to cope with it and in order to recover. The right approaches, strategies and policies can limit the crisis' negative impacts and help the destination overcome it and even improve its tourism performance. It is an opportunity to establish good crisis management in a way that would help prevent and cope with a potential future crisis.

The in-depth interview conducted with the manager of the Goriška Brda DMO (personal communication, 5 April 2020) revealed a series of actions the destination had already taken in order to cope and ensure a faster recovery from the crisis. The destination was quick to respond to the situation and was working on implementing policies that would help in times of the crisis and thereafter. The destination will take its strengths and weaknesses into account to ensure a proper response as well as think of how to avoid the possible threats. The most important policies relate to collaboration among all stakeholders, funding and help for tourism businesses, intensive marketing and communication with tourists, a focus on Slovenian tourists and taking advantage of types of tourism related to nature.

The challenge facing the tourism industry now requires a holistic view of the situation and the collaborative response of all stakeholders involved. The policies taken by the authorities need to apply to and be acceptable for everyone. Naturally, since every new experience brings new insights

and new knowledge, the COVID-19 crisis will also definitely lead to decisions and strategies that will hold particular importance for the future. Learning from mistakes and being innovative in solutions may prove crucial for preventing future crisis and successfully coping with them.

13 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS IN PIRAN AND PORTOROSE, SLOVENIA

Karina Amirgamzaeva

ABSTRACT

The present chapter looks at the effects of the COVID-19 pandemic on tourism policymaking in Piran and Portorose in Slovenia. As part of combatting the pandemic and without a vaccine or cure for the virus, a total lockdown was announced by governments in Slovenia and most other countries all over the world, triggering massive losses for all sectors of the economy. Tourism was brought to a standstill by the massive restrictions on travel outside and within countries. Being one of the most currently vulnerable industries, tourism has a long way to go to recover, save jobs and ensure safe travel for people. The pandemic holds similar effects for many destinations around the world. Piran and Portorose, considered in this chapter, are two Slovenian cities located on the Mediterranean coast. Their main tourism offer at the destination is coastal tourism. Tourism is the biggest generator of employment in the destination and the pandemic is thus heavily affecting the local economy. Recovery of the tourism sector is crucial for the well-being of the local community. The biggest challenges like the high level of uncertainty and lack of funding are identified in the present chapter; SWOT and IPA analyses of the destination are carried out; current policymaking is analysed while additional tourism policies are proposed.

The methods applied in this chapter include analysis of secondary data (desktop research) and empirical research (a semi-structured interview with the director of the Tourist Association of Portorose). Supporting the tourism sector with direct economic benefits and strengthening digital marketing efforts aimed at the domestic and regional markets are found to be the most efficient policies for overcoming the crisis.

13.1 INTRODUCTION

Piran and Portorose are two cities located on the Mediterranean coast of Slovenia. Located close to each other (they are just 3 km apart) and forming part of the same municipality, they form a single destination and apply the same tourism policies and strategies (Tourist Association of Portorose, n.d.). The main tourism offer is coastal tourism (Slovenian Tourist Board, n.d.-a). The destination is hence characterised by high seasonality with the peak season in summer (Slovenian Tourist Board, 2018). Tourism is the biggest generator of work at the destination and plays a crucial role in the local economy. The current COVID-19 crisis has brought tourism at the destination to a standstill, creating an ongoing crisis in the economy.

As Keown-McMullan noted (1997, p. 4), crisis implies three elements: “a triggering event causing significant change or having the potential to cause significant change; the perceived inability to cope with this change; and a threat to the existence of the foundation of the organization”. First identified in January 2020 in China, COVID-19, a new coronavirus, has spread to nearly

every country in the world and as at 7 April 2020 had affected 1,340,139 people and killed 74,427 (Worldometer, n.d.). In response to the pandemic, many countries imposed strict quarantine measures, including social distancing and the shutting down of transport, offices, restaurants and all kinds of places for public gatherings. However, governments and health specialists have realised that even the strictest measures cannot completely halt the virus; the measures taken are mainly aimed at lowering the rate at which the number of affected people grows, contain the spread of the virus or, in other words, “flatten the curve” (Gourinchas, 2020). The intention of this is to ease the pressure on health systems and allow more patients to be properly treated. The measures introduced by different countries’ governments have led to huge economic losses. One of the most vulnerable sectors is tourism: the mobility restrictions and social distancing have practically left tourism enterprises without revenue. Airlines, tour operators, hotels, restaurants, among all other enterprises, are bearing unprecedented economic losses. The present chapter studies the effects of the COVID-19 crisis on the tourism policies in Piran and Portorose.

13.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES IN PIRAN AND PORTOROSE

The chief kind of tourism in Portorose and Piran is coastal tourism (Tourist Association of Portorose, n.d.). Coastal tourism may be defined as the “full range of tourism, leisure, and recreationally oriented activities that take place in the coastal zone and the offshore coastal waters” (Hall, 2001, p. 2). Coastal zones are especially vulnerable to poor tourism planning due to the highly dynamic nature of the environment and the high growth of mass tourism, which is said to be of the biggest causes of pollution and ecological losses in coastal areas (UNEP, 2009; Hall, 2001). Clean water and the preservation of biodiversity are vital for developing coastal tourism. Other important issues are security threats – unpredictable environmental conditions such as tsunamis, storms, hurricanes (UNEP, 2009), as well as other threats common to any tourism destination – acts of terrorism, civil unrest, epidemics etc.

An example of crisis management in a coastal destination is Phuket, where in 2004 a tsunami killed 67 people, destroyed more than 200 houses and damaged over 600 houses (Tawatchai, 2005). Although a tragedy of that scale was unexpected, the Thai government already had broad experience in dealing with disasters, and its response was quick and efficient (Gurtner, 2007b). Within several days of the tsunami, thanks to the close collaboration of the government, military, private companies and volunteers (including tourists) and the use of heavy equipment, the lions’ share of the affected beaches was cleared, as enabled by establishing an emergency operations centre to which all victims, residents, volunteers and businesses were directed (Gurtner, 2007b). Temporary accommodation and first-aid was provided immediately to those displaced by the tsunami; within one week databases containing all relevant contact information were released, while volunteers and translators were available at coordination centres, airports and medical facilities (Gurtner, 2007b).

The tragedy was covered widely by foreign media; shocking images and victims’ stories went viral on the Internet, damaging Phuket’s image (Gurtner, 2007b). The strategy for restoring the destination’s image included offering alternative pictures in the media, demonstrating the

community's resilience and reconstruction efforts; heavily discounting tourist offers; advertising targeting the domestic and regional markets; and strengthening public relations as part of re-establishing the Thai tourism brand (Gurtner, 2007b).

In the period after the tsunami crisis, the government had a chance to analyse the situation and implement new policies to ensure better crisis management in the future, including the development of an early warning system in the Indian Ocean and formulation of legislative requirements aimed at making the destination less vulnerable to natural catastrophes – changes in zoning mean that no construction can be built within 100 m of the foreshore (Gurtner, 2007b).

13.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR PIRAN AND PORTOROSE

Piran and Portorose are two Slovenian towns located on the Mediterranean coast along the Slovenian Istra (Slovenian Tourist Board, n.d.-b). Both towns are included in Mediterranean Slovenia – one of the four Slovenia macrodestinations (Slovenian Tourist Board, n.d. b). Apart from coastal tourism, the main tourism offers are: wellness, MICE, and cultural tourism (Slovenian Tourist Board, n.d.). The peak season is in July and August, with almost six times more tourist arrivals than in December and January (Slovenian Tourist Board, 2018). The Municipality of Piran, which includes the town of Portorose, has the biggest number of accommodation facilities among all Slovenian municipalities (Slovenian Tourist Board, 2018). The destination is strongly oriented to the domestic and regional markets: domestic tourists make the highest number of overnight stays, followed by Italians and Austrians (Slovenian Tourist Board, 2018). Tourism is the biggest generator of jobs in the municipality, making it crucial for the local economy (Rudež, Sedmak & Bojnec, 2013). The major commercial stakeholders are the casinos (one big and two small ones) and the hotels (Holloway, 2004; Slovenian Tourist Board, n.d.).

Table 23: Basic indicators for Piran and Portorose

Indicator	Piran & Portorose
Area in km ²	45
Population (number)	17,962
Registered unemployment rate (%)	No data available
Tourism arrivals in 2019 (number)	620,495
Tourism arrivals growth 2019/2018 (%)	2.6
Nights spent 2019 (number)	1,882,383
Nights spent growth 2019/2018 (%)	-15.34

Sources: Slovenian Tourist Board (2018, 2019); Statistical Office of the Republic of Slovenia (n.d.).

13.3.1 SWOT analysis for Piran and Portorose in light of the COVID-19 crisis

As part of the research, a study of the destination's strengths, weaknesses, opportunities and threats (SWOT analysis) was carried out. The main strengths identified are the proximity of the target market and the mild climate. These strengths represent an opportunity for a quicker recovery after the pandemic. The biggest weakness is the lack of financial resources for marketing, which poses the threat of losing in the competition for 'wealthier' neighbours with a similar tourism offer (particularly Croatia). The data were collected from an interview with the director of the Tourist Association of Portorose (2020) and from the website of the destination's management organisation (DMO).

Figure 23: SWOT analysis for Piran and Portorose

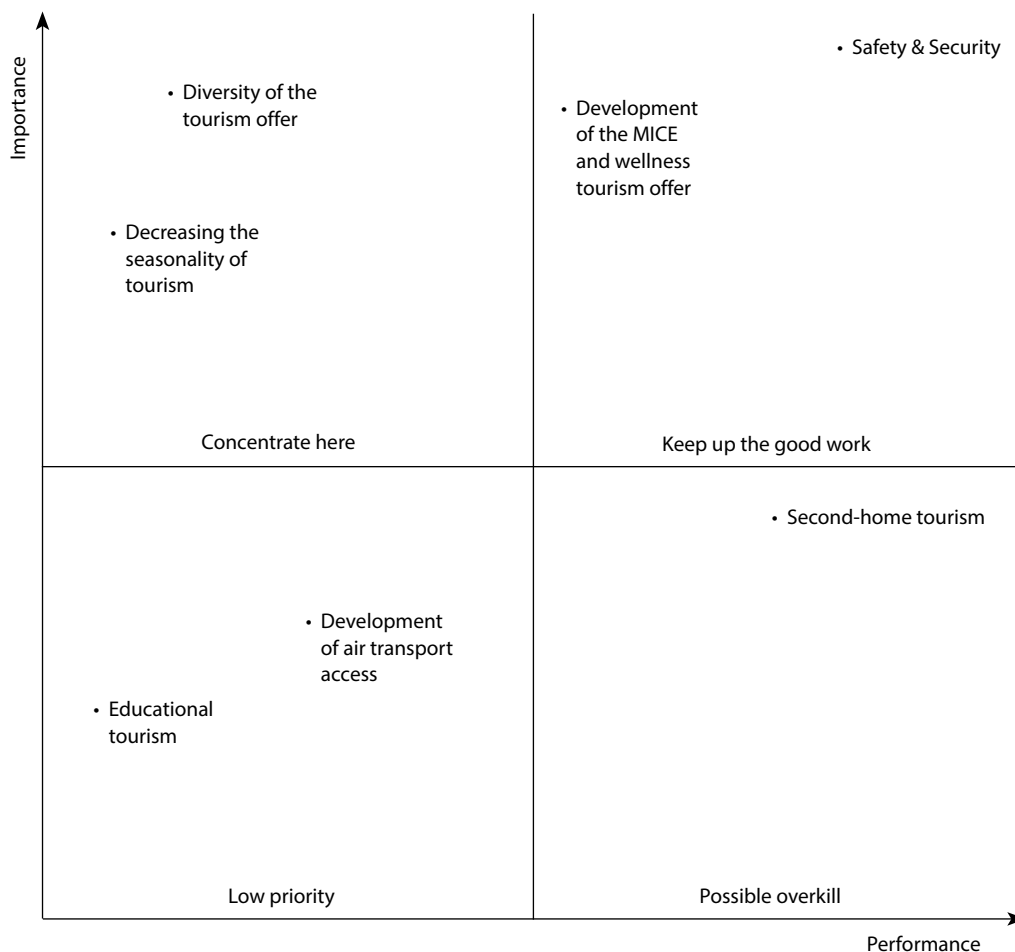
Strengths	Weaknesses
<ul style="list-style-type: none"> › The major target markets are located within 500 km – easier to recover after the crisis › Geographical position › Accessibility › Mild climate › Good wellness offer › Proximity of big tourist markets › Rich natural and cultural heritage › Security › Price/quality ratio › High visibility in the major markets 	<ul style="list-style-type: none"> › Lack of financial resources for marketing › Insufficient parking spaces › Inappropriate utilisation of natural parks › Insufficient quality of nightlife › Inadequate tourist infrastructure › Lack of recreational activities › Lack of tour offers
Opportunities	Threats
<ul style="list-style-type: none"> › Growth of local tourism after the epidemic – a step towards more sustainable development › As a short break › Orientation to market niches › Security › Domestic guests – personalisation › Guests with greater purchasing power › Development of sports tourism (sailing, tennis) › Development of MICE tourism › Authentic environment and offer › Giuseppe Tartini – historical heritage › Salt pans – a unique element of the offer 	<ul style="list-style-type: none"> › The budget of the DMO will decrease with the drop in visitation, as it is formed by the allocated 40% of tourist fees to the DMO. The problem of lack of financial resources for marketing might worsen. › Temporary closure of hotels brings significant losses and it will be difficult to reopen them › Resistance of the local population › Lack of professional staff › Big number of one-day visitors › Low capacity utilisation › The significantly faster development of neighbouring Croatia › Marine pollution › Traffic jams

Sources: Director of the Tourist Association of Portorose (personal communication, 2 April 2020); Tourist Association of Portorose (n.d.).

13.3.2 Importance-performance analysis for Piran & Portorose during the COVID-19 crisis

Importance-performance analysis was first proposed by Martilla & James (1977); this tool, represented by a two-dimensional graph, analyses management strategies with regard to how important they are for a company/destination and how efficiently they have been implemented. The importance-performance analysis for Piran and Portorose is presented in the figure below. The data were obtained from the interview with the director of the Tourist Association of Portorose (personal communication, 2 April 2020) and from the website of the DMO (Tourist Association of Portorose, n.d.). The analysis was conducted while taking the current pandemic into account; for instance, while the nightlife offer would normally be an area the destination should concentrate its efforts on, during the pandemic it is not a priority anymore and thus not included in the analysis.

Figure 24: Importance-performance analysis for Piran and Portorose



Sources: Director of the Tourist Association of Portorose (personal communication, 2 April 2020); Tourist Association of Portorose (n.d.).

13.4 EMPIRICAL RESEARCH

For the purposes of this research, a semi-structured interview was conducted with the director of the Tourist Association of Portorose (personal communication, 2 April 2020). The interviewee was asked about the measures taken to combat the COVID-19 crisis at the destination, along with more general questions regarding the destination. The results and findings are presented below.

13.4.1 Results and implications

As a result of this research, the following strength of Piran and Portorose was identified: the biggest share of tourists come from Slovenia and the neighbouring countries – Italy, Austria, Hungary etc. (Director of the Tourist Association of Portorose, personal communication, 2 April 2020). This gives the destination a competitive advantage since restoring tourism drawing on nearby markets will be an easier task than if the major market were located, for instance, in Asia or the Americas. Another advantage is the destination's high visibility in the regional market – this will also make it easier to attract tourists after the pandemic is over (Director of the Tourist Association of Portorose, personal communication, 2 April 2020). The biggest disadvantage identified is the lack of funding for marketing activities, which is especially threatening because the neighbouring Croatia, a direct competitor of Piran and Portorose, ensures much more substantial resources for marketing its coastal destinations (Director of the Tourist Association of Portorose, personal communication, 2 April 2020). This also explains why Croatia might not be interested in a marketing alliance with Piran and Portorose, making any proposal about a marketing alliance featuring the neighbouring countries irrelevant.

One of the greatest opportunities given the COVID-19 crisis is the potential growth of the local market, which means stepping towards more sustainable development (Director of the Tourist Association of Portorose, personal communication, 2 April 2020). Another opportunity is future recognition of the tourism sector's importance for the economy of Piran and Portorose. The director of the Tourist Association of Portorose (personal communication, 2 April 2020) hopes the municipality will realise how essential tourism is for the local economy, now that tourism is in crisis and the revenues from tourism activities have dried up.

One of the biggest threats identified is the crisis of liquidity among the hotels, which are bearing significant losses by virtue of their temporary closure. Another threat is low budget funding available for marketing in the upcoming seasons since the DMO's budget is formed from money arising from tourist taxes, and thus directly depends on the number of tourist arrivals (Director of the Tourist Association of Portorose, personal communication, 2 April 2020). In order to overcome this threat, financing from the municipality is needed; the director of the Tourist Association of Portorose (personal communication, 2 April 2020) is aiming to propose that the municipality increase its marketing budget from EUR 70,000 to EUR 100,000, while at the same time waiving the usual related fee for the companies during the crisis (currently, 40% of the tourist tax paid by the companies is used to fund the DMO).

As of 2 April 2020, the policies enforced at the destination were generally applied to the whole country and being implemented by the government: quarantine lockdown, sanitary measures, restriction of movement, and compensation of 80% of salaries. They have proven to be appropriate for the current phase of the crisis, when the main goal is saving people's lives and containing the pandemic. The policymaking in Piran and Portorose is now based on the assumption that the restrictions will be lifted by autumn; all events are being postponed until autumn 2020 or next year (Director of the Tourist Association of Portorose, personal communication, 2 April 2020). The mentioned interviewee (personal communication, 2 April 2020) proposes that the money previously allocated to events subsequently cancelled be used to finance digital marketing activities in the future. His plan is to propose a strategy of preparing digital marketing materials in advance so that when the crisis is over the marketing campaign is ready to launch – this would help the DMO take a flexible approach, which is essential given the considerable uncertainty. Another policy for overcoming the crisis in tourism is to provide organisational support as an incentive for companies to develop their activities in Piran and Portorose; this would also require additional financing, estimated by the director of the Tourist Association of Portorose (personal communication, 2 April 2020) at EUR 60,000. The major factors on which the implementation of any tourism policies will depend are how the pandemic develops and the policies of the Slovenian government. Presently, the Slovenian government is preparing a second set of actions aimed at helping the country overcome the crisis, where tourism companies expect further support (Director of the Tourist Association of Portorose, personal communication, 2 April 2020).

According to the director of the Tourist Association of Portorose (personal communication, 2 April 2020), there has always been close cooperation with tourism stakeholders in the region. As of 2 April 2020, the major stakeholders were actively involved in policymaking for the post-pandemic period – they were being consulted by email, and their proposals and opinions were to be taken into account while planning policies for the future. Strengthening future collaboration among stakeholders will be crucial for overcoming the crisis (Director of the Tourist Association of Portorose, personal communication, 2 April 2020).

One of the popular strategies for coping with a crisis is to reduce prices and introduce additional incentives to increase the inflow of tourists (Gurtner, 2007c). Yet, such a policy could bring a decrease in average expenditure, overtourism and orientation to an undesirable segment of tourists. In the case of Piran and Portorose, cutting prices seems inappropriate. As stated by the Slovenian Tourism Board (n.d.), its vision of developing the national tourism brand is as: “a green boutique global destination for high-end visitors seeking diverse and active experiences, peace, and personal benefits. A destination of five-star experiences”. In order to keep on this track, Slovenian tourism companies (including those in Piran and Portorose) should retain their usual prices and seek other ways of attracting the desired segment of tourists – mainly through marketing and PR campaigns.

Table 24: Policies suggested for Piran and Portorose

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Financial aid for continuing the payment of 80% of normal salaries during the temporary closure of companies	Yes	Supporting the businesses and the DMO	Slovenian Government	80% of normal salaries being paid to all employees
Redistributing money from the events cancelled in spring to future post-crisis marketing efforts	No	Supporting the marketing activities	Tourist Association of Portorose	The reallocation of all financial resources from the cancelled events to future marketing campaigns
Cancelling the fee (40% of the tourism tax) that companies normally pay the DMO	No	Supporting the businesses	Tourist Association of Portorose, Municipality of Piran	Full waiver of the 40% fee
Preparing digital marketing campaigns ready to be launch quickly after the pandemic crisis	No	Recovering tourist arrivals after the pandemic	Tourist Association of Portorose	The readiness of marketing campaigns to be launched by summer 2020
Increasing the budget for digital marketing campaigns from EUR 70,000 to EUR 100,000	No	Recovering tourist arrivals after the pandemic	Tourist Association of Portorose, Municipality of Piran	An increase of EUR 30,000 in the digital marketing budget
Allocating EUR 60,000 for organisational support to motivate tourism companies to develop activities in Piran & Portorose	No	Supporting the businesses & increasing revenues from tourism	Tourist Association of Portorose, Municipality of Piran	The allocation of EUR 60,000 for organisational support
A stronger focus on the domestic and regional markets	No	Recovering tourist arrivals after the pandemic	Tourist Association of Portorose	% of domestic and regional tourist arrivals in overall number of tourist arrivals

Sources: *Beirman (2007)*; *Director of the Tourist Association of Portorose, personal communication (2 April 2020)*; *Gopinath (2020)*; *Gurtner (2007c)*; *Henderson (2007b)*; *UNWTO (2020f)*.

13.4.2 Limitations

The present research is subject to multiple limitations and describing them may benefit further research. First, due to the time constraint of 2 weeks, the research was limited to the methods used. Only one semi-structured interview was conducted; more interviews with multiple stakeholders – tourism companies in Piran and Portorose, the Slovenian government, potential tourists, the local community – may have added greater value to the research and revealed other findings. The topic was only explored from the point of view of the DMO of Piran and Portorose, which significantly narrows the perspective given that the crisis is global in nature. The target markets and the views held by potential tourists were not studied due to the time constraints. They may have introduced another perspective on the DMO's future marketing strategies.

Another limitation is simply that the pandemic still has to be overcome, with the future holding a lot of uncertainty; this makes it reasonable to expect that the situation will continue to change rapidly and new policies and approaches will be needed depending on the pandemic's trajectory. Further research is suggested to assess the crisis' impacts on the tourism policies in Piran and Portorose.

13.5 CONCLUSION

This chapter has considered the development of tourism policy in Piran and Portorose during the time of the COVID-19 crisis. Definitions of crisis, crisis management, anti-crisis strategies and policies in tourism were discussed and cases from various parts of the world were described. Several possible anti-crisis policies were proposed for Piran and Portorose. A semi-structured interview with the director of the Tourist Association of Portorose was conducted, with implications based on the findings being presented. The DMO of Piran and Portorose is following the government's current directives – postponing the events that had been planned for the spring season and waiting for future instructions. The development of the crisis is closely tied to the trajectory of the COVID-19 pandemic, and in April 2020 how the policies will develop in the next months is hard to predict. Once the pandemic has come to an end and the restrictions on movement and economic activities have been lifted, the DMO's biggest focus is to be on digital marketing activities aimed at the domestic and regional market. This would give the DMO flexibility and an opportunity to respond quickly to possible changes; the orientation to the local and regional markets is because these are the biggest markets for Piran and Portorose where the destination's brand is strong.

14 DEVELOPING TOURISM POLICY DURING THE COVID-19 CRISIS ON HVAR, CROATIA

Barbara Bachiocco

ABSTRACT

The tourism sector is particularly vulnerable to external shocks (Ringbeck & Pietsch, 2009) like terrorist attacks, financial crises, political turmoil, natural disasters and epidemics (Baker, 2014; WTTC, 2019a). Although health-induced crises are relatively infrequent, their negative impacts on tourism are wide, greater than terrorist attacks (Misrahi, 2016). In the past, crisis management in tourism remained largely under investigated (Santana, 2004; Laws, Prideaux & Chon, 2007; Morrison, 2018), yet the topic has recently received ever more attention (Laws, Prideaux & Chon, 2007). Indeed, effective crisis management is vital for tourism since it is highly probable that crises will emerge and affect the sector (Ritchie, 2004).

Despite the body of knowledge on crisis management in tourism having increased, health-induced crises are still under-investigated (Novelli et al., 2018). Thus, the aim of the present chapter is to investigate the role played by tourism policies in coping with crises, with consideration of the current COVID-19 epidemic. In particular, this chapter looks at the Croatian city of Hvar, located on an island of the same name. The case is particularly interesting as Hvar is the Croatia's oldest organised tourism destination (Hvar Municipality, 2019), yet it seems to lack a proactive crisis management plan. Moreover, the city of Hvar is in a period of transition from being a 'party destination' to becoming Croatia's most exclusive island destination (Bradbury, 2019; Popadić, 2017). The chapter describes some actual and potential policies the destination could implement, along with an indicator to assess their effectiveness. Further, an empirical study of the destination provides some insights into how the Hvar Tourist Board can minimise the negative effects of COVID-19 on the destination.

14.1 INTRODUCTION

Over the last few decades, the tourism industry has experienced several crises of a different nature: economic recessions, terrorist attacks, political turmoil, natural disasters and epidemics (Faulkner, 2001; Baker, 2014; Ghimire, 2015; WTTC, 2019a). In the setting of approximately one-third of the world's population being under lockdown (Kaplan, Frias & McFall-Johnsen, 2020) due to the outbreak of the novel COVID-19 virus (World Health Organisation, 2020b), the future of tourism seems more uncertain than ever before because, without people being able to move around, tourism simply cannot exist (La Rocca, 2015). At this difficult time, crisis management and well-timed strategies and policies are essential for minimising the pandemic's impacts and restoring tourism in the post-crisis period (Huang, Tseng & Petrick, 2008). Although tourism crisis management has received increasing attention (Ritchie, 2004; Huang, Tseng & Petrick,

2008; Faulkner, 2001; Boukas & Ziakas, 2013; Baker, 2014; Ghimire, 2015; Glaesser, 2006), few studies have considered the effects of a health-induced crisis on tourism and tourism policies (Novelli et al., 2018).

Given the topicality of the subject, the present chapter focuses on the role of developing tourism policies for managing a health-induced crisis, in particular with respect to the Croatian city of Hvar. This latter was selected as a case study not only because Hvar is one of the most renowned and visited Croatian island destinations (Hvar Tourist Board, 2020), but also because the island depends strongly on tourism as the sector accounts for the biggest source of employment for the local community (Hvar Municipality, 2019).

The chapter explores the most relevant crisis management techniques, tourism strategies and policies for coping with crises at the destination. This is followed by a thorough situational and trend analysis of the destination. The next section presenting the empirical research summarises the main findings of an interview conducted by e-mail with the Hvar Tourist Board Director and a Municipality Representative and propose certain potential tourism policies for supporting the destination management during the COVID-19 crisis. Finally, the chapter presents the limitations of the study and indicates some areas for future research concerning the topic at hand.

Overall, the chapter's aim is not to create an ultimate tourism policy framework for managing all health crises, but to provide a more refined and nuanced understanding of the topic under study, with a view to adding to the present body of knowledge and helping destinations around the world make more informed decisions.

14.2 CRISIS MANAGEMENT, TOURISM STRATEGIES AND POLICIES FOR COPING WITH CRISES ON HVAR

With a tradition in tourism lasting over 150 years, the Croatian city of Hvar, located on an island of the same name, is Europe's oldest organised tourism destination (Hvar Tourist Board, 2020). In the last decade, the city of Hvar has primarily been seen as a party destination, with an increasing number of late opening bars and nightclubs being built. However, the negative socio-environmental externalities arising from developing Hvar as a party island led the Hvar Tourist Board to change the strategy for the destination and reposition the city as a more exclusive and cultural destination (Bradbury, 2019; Popadić, 2017). Nowadays, tourism is the main source of jobs for the local community and the destination's overreliance on tourism, as well as its distance from the mainland, makes it particularly vulnerable to external shocks (Hvar Municipality, 2019). Given Hvar's economic reliance on tourism (Hvar Municipality, 2019), the destination and the various stakeholders should have a proactive crisis management plan in place. This not only holds for Hvar, but the entire country (Mikulić et al., 2018). According to Mikulić et al. (2018), Croatia's geographical location in a politically turbulent region and the country's dependence on tourism mean the state should to adopt a proactive risk management approach on the national level, which should be included in the national tourism development strategy. Yet, a study conducted in 2017 revealed that the majority of hoteliers in the Dalmatian region, of which Hvar forms part, had not

developed any plan or procedure to address a potential crisis. This absence was justified by the fact that Croatia is regarded as a safe destination, contrasting with the recommendations of academics and industry experts (Bilić, Pivčević & Čevra, 2017).

In Croatia, the primary mission of regional and local tourist boards is to market and promote the destination, while product management activities play only a secondary role (Croatian Ministry of Tourism and Sport, 2020). Based on the above premise, in times of crisis, the Hvar Tourist Board should adopt a proactive crisis communication strategy. The Board could also implement a marketing strategy to attract tourists in the post-crisis phase. As concerns tourism policies for coping with crises, Hvar could minimise their negative effects by enforcing different policies. First, the local community of Hvar would benefit directly from the implementation of a fiscal policy. In relation to the COVID-19 crisis, the Croatian Ministry of Tourism has already acted to reduce the fiscal pressure on private renters and postponed the payment of the concession fee for camping sites (Croatian Ministry of Tourism and Sport, 2020). Still, there is a need for a more holistic policy because restaurant owners, shop owners and tourism employees are still excluded from the present one. Second, Hvar should also implement policies for crisis communication and destination marketing in order to attract visitors in the phase following the crisis (Hvar Tourist Board director, 2020).

14.3 SITUATIONAL ANALYSIS AND TREND ANALYSIS FOR HVAR

The table below summarises basic indicators for the destination. Tourism in Hvar shows a positive trend. Tourism arrivals for the 2018/2019 period grew by 2.01%, while nights spent at the destination grew by 0.5% in the same period. This reflects the new unexpected tendency of Hvar becoming a day-visit destination. This new trend is partially correlated with the increase in daily catamarans and ferries connecting the destination to the mainland and other islands nearby (Hvar Municipality, 2019; Hvar Tourist Board, 2020).

Table 25: Basic indicators for Hvar

Indicator	Hvar, Croatia
Area in km ²	75.8
Population (number)	4,251
Registered unemployment rate (%)	1.9
Tourism arrivals in 2019 (number)	210,942
Tourism arrivals growth 2019/2018 (%)	2.01
Nights spent 2019 (number)	763,629
Nights spent growth 2019/2018 (%)	0.5

Sources: Hvar Municipality (2019); Hvar Tourist Board (2020).

14.3.1 SWOT analysis for Hvar in light of the COVID-19 crisis

Next, a SWOT analysis summarises the unique characteristics of Hvar to be considered in the context of the COVID-19 crisis. Interestingly, there is a currently a blurred line between the strengths and weakness, opportunities and threats at the destination. For instance, Hvar's distance from the mainland it is often regarded as a weakness for attracting and managing visitor arrivals (Hvar Municipality, 2019), yet it has now become a strength as it helps in containing the spread of the virus (Tourist Board Director of Hvar, personal communication, 5 April 2020). Similarly, the seasonality of tourism, which in normal conditions is a weakness of the destination, has acted to help the businesses with respect to not dismissing employees as they had yet to start working (Tourist Board Director of Hvar, personal communication, 5 April 2020).

Figure 25: SWOT analysis for Hvar

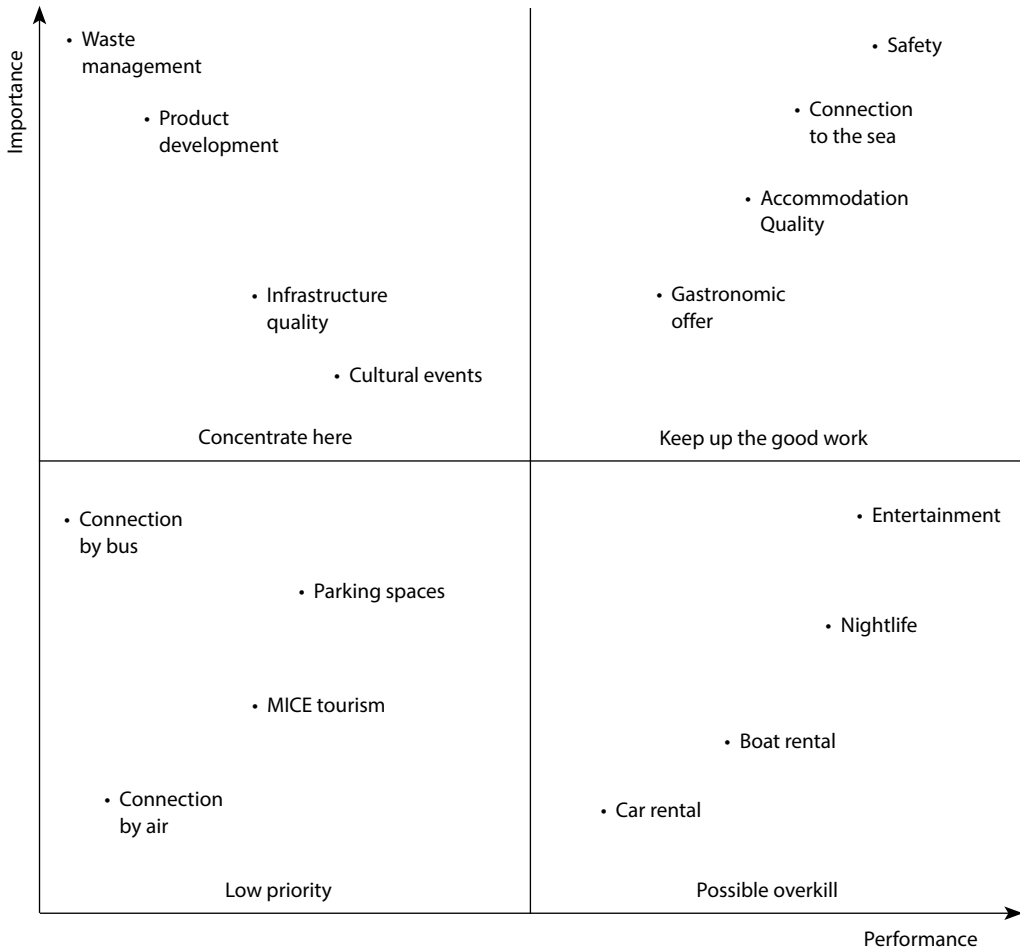
Strengths	Weaknesses
<ul style="list-style-type: none"> › Distance from the mainland › Long tradition in tourism › World-renowned destination › Rich cultural heritage › Sunniest island in Croatia 	<ul style="list-style-type: none"> › Perceived as a 'party destination' › Economic overdependence on tourism › Considerable seasonality
Opportunities	Threats
<ul style="list-style-type: none"> › Becoming a year-round destination › Becoming the most exclusive destination in Croatia › Developing sports and active tourism 	<ul style="list-style-type: none"> › Further unsustainable development of tourism accommodation and businesses › The second wave of COVID-19 › Prolonged social-distancing measures

Sources: Tourist Board Director of Hvar (personal communication, 5 April 2020); Hvar Municipality (2019); Own work.

14.3.2 Importance-performance analysis for Hvar during the COVID-19 crisis

In the following graph, an importance-performance analysis for Hvar in the setting of the COVID-19 crisis is summarised. Its aim "is to help policymakers to identify service/product elements for which resources could be allocated to contribute to higher satisfaction of users" (Ormanović et al., 2017).

Figure 26: Importance-performance analysis for Hvar



Sources: Hvar Tourist Board (2020); Hvar Tourist Board Director (personal communication, 5 April 2020); Own work.

14.4 EMPIRICAL RESEARCH

This section presents an empirical investigation of the impacts of COVID-19 on the tourist destination of Hvar. The purpose of this empirical study is to gain first-hand insights concerning the destination’s crisis management plan and strategy and to analyse the effectiveness of the actual and potential policies implemented.

14.4.1 Results and implications

Based on an interview conducted by e-mail on 31 March 2020 with the Hvar Tourist Board Director and a Hvar Municipality Representative, the Hvar Tourist Board seems to engage in a temporary policymaking process in response to the crisis. Indeed, Hvar’s crisis management strategy appears

to be mainly reactive. In this context, a scenario-planning exercise would help the destination in designing policies to address the current emergency (Page et al., 2006). Currently, Hvar is planning to implement its marketing and destination management strategies created before the outbreak of COVID-19. Yet, a business-as-usual approach is not recommended by tourism industry experts (Garibaldi & Bradbury, 2020). Indeed, in the aftermath of a crisis, tourism demand and supply change (UNWTO, 2020e; WTTC, 2020a). As an example, tourists become more price-sensitive and tend to prefer shorter stays (Steiner et al., 2012). Following a crisis, destinations should develop a strategic marketing plan based on the new market situation. For instance, tourism destinations could focus on attracting market segments that are less sensitive to crises (WTTC, 2016). During the interview with the Tourist Board Director of Hvar (personal communication, 5 April 2020), it emerged that while the factors that will influence policy development following the crisis are solely financial, the tourist board should not overlook the wider socio-environmental factors. Namely, stakeholder collaboration is fundamental for recovering from a crisis (Ritchie, 2004). Building on the interview, the policies below are proposed to help increase the destination's resilience and facilitate its recovery.

Policy 1: Fiscal Policy

In order to cope with the present health-induced crisis, Hvar has implemented two fiscal policies issued by the Croatian Ministry of Tourism. The first one involves the postponement or waiver of payment of the tourist lump-sum tax for persons providing accommodation services at home or on the family farm. Moreover, for the year 2020, these categories were exempted from paying the tourist tax for extra beds (Croatian Ministry of Tourism and Sport, 2020). The measure aims to mitigate the financial impact on these groups since they pay the tourist tax at a flat rate per bed, not per night (Tourist Board Director of Hvar, personal communication, 5 April 2020). Although the institution responsible is the Croatian Ministry of Tourism, and thus the policy applies to the whole country, the policy is particularly important for the city of Hvar given that for approximately 30% of households providing private accommodation or offering food and beverage services is their only income source (Hvar Municipality, 2019). The second policy involves the postponement of payment of the concession fee on land used for tourist camping sites in order to retain jobs in the sector (Croatian Ministry of Tourism and Sport, 2020). Still, it is necessary to create a more holistic policy because restaurant owners, shop owners and tourism employees are still excluded from the present one. Remarkably, one of the biggest problems while dealing with fiscal policy in tourism is that it is not easy to divide tourism activity from the rest (Feliziani & Monni, 2012). Given the complexity of measuring the effects of a fiscal policy, compared to an indicator, it is suggested to perform input-output analysis. Input-output analysis («I-O») is a form of macroeconomic analysis based on the interdependencies of economic sectors or industries (Leontief & Strout, 1963).

Policy 2: Diversification of the tourism source markets policy

In Hvar, the two major source markets are the USA and the UK, with each contributing 15% of arrivals (Hvar Tourist Board, 2020). Yet, each country is currently seriously affected by the outbreak of COVID-19 (Russell, 2020). Based on historical data, the dependence on a limited

number of source markets increases the risk of a destination losing visitors and revenue streams during an economic crisis (UNWTO, 2016; WTTC, 2016). Further, countries that rely on a large proportion of tourists coming from one specific country are more sensitive to exchange-rate fluctuations between these two countries (WTTC, 2016; UNWTO, 2016). For instance, the travel and tourism sector in Mexico relies heavily on countries that use the US dollar, which account for 84% of international arrivals. The strength of the US dollar against the Mexican peso has a significant impact on Mexico's travel and tourism sector, and any fluctuation in the exchange rate has a large effect on the country. On the other hand, Thailand's largest source market is China, which accounts for just 18% of total international arrivals. In Thailand's tourism sector, the diversity of visitor source markets tends to provide some resilience for the country against specific exchange rate fluctuations in a single country or economy (UNWTO, 2016). This means Hvar should diversify its tourism source markets in order to increase the destination's long-term resilience (UNWTO, 2016). The institution responsible for implementing the policy would be the Hvar Tourist Board, while the indicator would be the ratio of source market visitors to the total number of tourist arrivals. This indicator could be used to compare the ratios before and after the implementation of the policy to determine whether Hvar has diversified its tourism source markets.

Policy 3: Quality Policy

To assist the destination in recovering in the post-crisis period, the city of Hvar could implement a quality policy. Such a policy can be defined as "a set of general directives and instructions with respect to quality formally issued by the senior management of an organization" (UNWTO, 2017, p. 129). Remarkably, in the period following a crisis, competition among destinations tends to become tougher (Scott, Laws & Prideaux, 2013), while tourists tend to be more price-sensitive and prefer shorter vacations (Steiner et al., 2012). In this highly competitive context, a policy on quality would allow Hvar to stand out from the competition in terms of quality and to not have to compete with other destinations merely on prices. As may be learned from the airline or hotel industry, a low-price strategy increases the risk of a price war in which rival firms lower their prices to undercut each other (Rao, Bergen & Davis, 2000). Moreover, a quality policy would align with the destination's strategy of developing a qualitative tourism offer and becoming an exclusive destination (Hvar Municipality, 2019; Bradbury, 2019). Indeed, the city of Hvar is the first destination in Croatia to have implemented quality assurance measures for tourist facilities and services according to the IQM (Integrated Quality Management) standards and the ReviewPro global platform (Croatian Ministry of Tourism and Sport, 2019). Here, the institution responsible for policy implementation would be the Hvar Tourist Board, while the indicator would be the guest rating score, an index already used by the destination. This type of index measures tourists' overall satisfaction with the destination (Hvar Municipality, 2020). In 2019, for the Guest Rating Score (GRS) Hvar achieved 89.5 out of 100 points, namely, 1.7% higher than in 2018. The city of Hvar has been aiming to achieve a score of 90 (Croatian Ministry of Tourism and Sport, 2019).

Policy 4: Tourism deseasonalisation policy

Based on the forecast, COVID-19 seriously threatens the upcoming summer tourist season 2020 (Šestan, 2020). This situation is especially critical for destinations like Hvar where tourism is seasonal and highly concentrated during the summer months (Hvar Municipality, 2019). In times of crisis, seasonal destinations and businesses are the most at risk, with tourist demand possibly being lost, as opposed to shifted to the entire year (Kilpatrick, Barter & Dess, 2020). In order to minimise the risk of the present and future crises, Hvar should consider adopting a policy of deseasonalising tourism aimed at reducing the impact of the seasons and developing year-round tourism. In particular, Hvar has a competitive advantage over other island destinations with regard to developing all-year-tourism as its geographical position and microclimate make it the sunniest island in Croatia (Bucar, Maric & Kovac, 2015). In the low season, the destination could promote different types of niche tourism products: outdoor sport and active tourism, cultural tourism, health tourism, as well as gastronomic tourism (Hvar Municipality, 2019). This local policy would align with the Croatian Ministry of Tourism's strategy of promoting Croatia as a year-round destination (Croatian Ministry of Tourism and Sport, 2020). The institution responsible for implementing the policy would be the Hvar Tourist Board, that would then be able to manage the transition from seasonal to year-round tourism activity. In particular, the indicator for assessing success in implementing the policy would be the Gini coefficient, the index most commonly used to analyse seasonality (Duro, 2016). This coefficient ascribes a numerical value to seasonality, making the comparison of years and different destinations possible. The Gini coefficient takes values from zero to one: the closer it is to zero, the less seasonality at the destination, while the closer it is to one, the greater the seasonality (Þórhallsdóttir & Ólafsson, 2017). The indicator would show the level of seasonality before and after implementation of the policy. This quantitative indicator would allow the policy's effectiveness to be assessed, whereas revealing the contrary would show that it is time to take corrective measures. Tourism deseasonalisation benefits different tourism stakeholders: private renters and hotels, that would be able to sell their underutilised capacity (Pegg, Patterson & Gariddo, 2012), and restaurant owners (Higuera, 2019), while the local community would benefit from employment (Richins & Hull, 2016).

Table 26: Policies suggested for Hvar

Policy	Policy already implemented? (Yes/No)	Strategic action (goal)	Institution responsible	Indicator
Fiscal Policy	Yes	Tax alleviation Job retention	Ministry of Tourism	Input–output analysis
Diversification of tourism source market policy	No	Diversify tourism source markets Increase the destination's resilience	Hvar Tourist Board	Market share by country of origin
Quality policy	No	Increase the destination's overall quality Position the destination in the high-end segment	Hvar Tourist Board	Guest Rating Score
Tourism deseasonalisation policy	No	Reduce the strong seasonality Attract tourists year-round	Hvar Tourist Board	The Gini coefficient

Source: Tourist Board Director of Hvar (personal communication, 5 April 2020).

14.4.2 Limitations

The findings of this study must be considered in view of some limitations. The chief source of potential bias arises from the fact that COVID-19 is an ongoing health crisis whose development is changing daily. Thus, some information presented in this chapter may well be outdated by the time of publication. Given the novelty of the crisis, there is a lack of verified data concerning the pandemic's effects on the tourism sector, with only approximate forecasts available thus far. Second, due to time constraints and space requirements the literature review does not cover the totality of existing tourism strategies and policies for coping with crises, only the principal and most implemented ones. This means that some strategies and policies that could be seen as relevant may have unintentionally been omitted by the author. Third, the results of the empirical study are based exclusively on the answers provided by the director of the Hvar Tourist Board (personal communication, 5 April 2020) and might be subject to personal bias or formal trade secrets. Moreover, the interview was conducted by e-mail because of the social-distancing measures introduced by the Croatian government in an effort to reduce the virus' spread. It is believed that the overall process would have led to greater understanding had the researcher been able to engage in a face-to-face interview. For future studies, it is suggested to repeat the study in order to better quantify COVID-19's impacts on the tourism sector at the destination. It is also recommended to increase the sample of interviewees, to include private accommodation owners and hotel representatives, so as to acquire multiple perspectives concerning Hvar's crisis management plan and strategies.

14.5 CONCLUSION

To sum up, the tourism industry is vulnerable to external shocks like crises and natural disasters (Ringbeck & Pietsch, 2009). Tourism is today one of the industries most affected by the coronavirus (COVID-19) pandemic (UNWTO, 2020f; WTTC, 2020a) since without mobility tourism cannot exist (La Rocca, 2015). Although health-induced crises tend to be less frequent, their impacts on tourism are wide and tend to endure (Misrahi, 2016). Given the tourism sector's vulnerability, destinations should adopt a proactive crisis management plan and strategy long before emergencies occur (OECD, 2018; Ritchie, 2004; Page et al., 2006). For instance, a scenario-planning exercise can help destinations prepare for such an eventuality (Page et al., 2006). For an effective result, it is also essential to link the scenario-planning exercise outcomes to both policy formulation and strategic actions (Page et al., 2006). Nevertheless, various destinations are still prepared to manage a crisis, and continue to rely on reactive strategies and policies to cope with emergencies (Pforr, 2006; Chien & Law, 2003). Government can implement a variety of policies for dealing with a crisis, depending on the strategic goal being pursued (OECD, 2010).

The case study of Hvar showed that although the city has a tradition in tourism of over 150 years, the destination still does not have a proactive management plan. The destination could implement a range of policies to assist the recovery from the crisis: fiscal policy, diversification of the tourism source market policy, quality policy, tourism deseasonalisation policy. The first policy would support tourism employers and employees during the recession, while the other three would help the destination recover during the post-crisis phase (Hvar Tourist Board Director, 2020). Regardless of the type of policy implemented, each must be measured and evaluated as part of assessing its effectiveness and efficiency (OECD, 2010). Indeed, "often, the biggest risk is not the crisis itself, but rather the preparation, management and response" (WTTC, 2019a, p. 15).

15 CONCLUSION

Kir Kuščer

Every country and destination has a unique set of considerations and factors, making it unrealistic to expect a universal cure for the COVID-19 crisis. Still, the monograph suggests numerous measures and policies with respect to several different countries and destinations aimed at tackling the crisis. It is clear that DMOs must respond swiftly to a crisis event and initiate a recovery strategy (Beirman, 2003). The shaping of policies and making of decisions should incorporate action reports and examples of best practices that have surfaced (Goniewicz et al., 2020). Tourism policymaking in times of a pandemic takes place in a rapidly changing and dynamic environment (Monterrubio, 2010); the research was conducted in early April 2020. Many countries and destinations that are more proactive had already implemented over half the policies they had proposed to tackle the COVID-19 crisis. Yet others were still more in the stage of discussing policies than actually implementing them at the time the interviews were performed. Common actions taken by the countries and destinations under consideration generally refer to shutting down whole economies, implementing health safety measures, policies for retaining jobs, financial stimuli for businesses, tax relief and other fiscal policies. Many have increased their marketing efforts and worked on stakeholder collaboration. Education activities have taken place, with some destinations started to reimagine the old ways of tourism, focusing on sustainability and local demand and supply.

The possibility of an economic crisis looms following the health crisis. Bankruptcies, growing unemployment and other social problems associated with decreased tourism revenues seem to be unavoidable for most destinations. This downward spiral will be fuelled with people's unwillingness to travel due to fear of infection on one hand and being more cautious with their spending given the worsening economic conditions. The tourism policies that most destinations and countries identified as being crucial in the COVID-19 pandemic's first wave are supportive fiscal policies in terms of waiving or postponing tax payments and different stimulus packages in order to ensure the socio-economic well-being of businesses and people and to prevent unemployment and bankruptcies from increasing. Local employment can help a destination be more flexible and reap the benefits of being able to more easily adapt to quickly changing situations.

The significance of the cooperation of all stakeholders at a destination and inclusion of their interests in crisis management is highlighted throughout the monograph and may be seen as a key factor in dealing with the COVID-19 crisis. Poor tourism management in the form of weak collaboration between the government and stakeholders, a lack of control and the measures implemented are all serious weaknesses in times of crisis. Measures introduced stepwise in different phases of the crisis and relevant tourism policymaking should be based on scientific evidence while also involving the stakeholders. This can help local businesses recover better and initiate the revival of the entire destination. Carrying out a satisfaction survey among stakeholders along with a visitor survey to measure the perception and efficiency of the crisis communication might prove very useful for destinations.

Countries and destinations must be able to diversify their tourist offer, adapt their products and services to better suit the current situation and the changes in demand that may be expected in the future. One of these changes is putting greater stress on domestic tourism, which will become ever more important for most destinations in the upcoming years. Therefore, policies to stimulate domestic tourism are needed, such as offering some sort of financial incentive for inhabitants to spend their vacations at home. Further, seasonal destinations are at greater risk due to the shifts in demand in response to the COVID-19 situation. Destinations should therefore also actively pursue deseasonalisation policies to minimise the risk of the present and future crises. Tourism products and services for the low season can be developed based on outdoor sport and active tourism, cultural tourism, health tourism, gastronomic tourism etc.

Digitalisation has been growing in importance during the COVID-19 crisis and must be included directly in the day-to-day operations of businesses, organisations and the public sector, with special consideration given to digital marketing aimed at the domestic and regional markets («staycations»). Digitalisation is a way of remaining in people's minds during a travel ban through marketing campaigns, webpages and social media platforms. More proactive destinations offer a wide array of online presence, which will help them recover quicker and remain useful even after the situation has returned to 'normal'.

During the pandemic safety has been crucially important. Many destinations have decided to completely shut down. Upon reopening, the health of the tourists, local inhabitants and employees in tourism has to be ensured. Attracting tourists will more than ever before be connected to the level of safety, sanitisation and hygiene that a destination or country provides. Policies concerning safety, cleanliness and hygiene must be put forward. High levels of sanitisation and hygiene will probably remain a competitive advantage even when the COVID-19 crisis is over.

Some policies can be targeted to not only overcome the crisis, but to reinvent the overall operations towards sustainable development due to the prospect of industry disruption. Apart from the opportunity to not simply recover from the crisis, destinations can emerge stronger, better, more sustainable and innovative, create better jobs for local residents, and promote public participation and engagement. Nature-based tourism will continue to gain in popularity since in the circumstances of Covid-19 people want more space and less frequent contacts with other people.

A strength of this monograph is the collection of ideas concerning different responses to the crisis that will enable destinations to consider implementing measures that other destinations have taken. The book can assist destinations at a different stage of the COVID-19 crisis by reading how other DMOs have responded. It provides a review of policies (implemented or planned) across the world, and thus can also provide a benchmark for the policies in place at various types of destinations.

Much changed in summer of 2020, and the reader can make an informed decision about the effectiveness of the policies that were proposed at the start of the pandemic. A learning mechanism could be established to reflect on the current crisis management and how destinations could be

better prepared for such crises. Future research could perform more interviews to identify the winning policies and see the latest changes in policymaking should the pandemic be longer-lasting, and which ones countries and destinations were able to adopt.

The collection of papers can serve as a guide for the future in terms of revising the relevance of the measures introduced at these countries and destinations, as well as a reference to resort to during future crises. It provides a reliable, easy-to-access information source about the policymaking process during COVID-19 underway in selected countries and destinations.

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Every country and destination has a unique set of considerations and factors, making it unrealistic to expect a universal cure for the COVID-19 crisis. Still, the monograph suggests numerous measures and policies with respect to several different countries and destinations aimed at tackling the crisis.

This means DMOs must respond quickly to a crisis event and initiate a recovery strategy (Beirman, 2003). Policy design and decision making should incorporate action reports and examples of best practices that have surfaced (Goniewicz et al., 2020). Tourism policymaking in times of a pandemic takes place in a rapidly changing and dynamic environment (Monterrubio, 2010); the research was conducted in early April 2020. Many countries and destinations that are more proactive had already implemented over half the measures they had proposed to deal with the COVID-19 crisis. Yet others were still more at the stage of discussing measures than actually implementing them at the time of the survey. Common measures taken by the countries and destinations surveyed at least to some extent have included shutting down the whole economy, implementing health protection measures, job retention measures, financial incentives for businesses, tax breaks and other fiscal measures. Many have increased their marketing efforts and worked to engage with their stakeholders. Educational activities have taken place and some destinations have begun to rethink the old ways of tourism and to focus on sustainability and local demand and supply.

The risk of an economic crisis looms following the health crisis. Bankruptcies, growing unemployment and other social problems related to declining tourism revenues seem inevitable for most destinations. This downward spiral is fuelled by people's unwillingness to travel in fear of becoming infected and more cautious with their spending due to the worsening economic conditions. The tourism policies identified by most destinations and countries as critical in the COVID-19 pandemic's first wave are supportive fiscal measures in the form of waiving or deferring tax payments and various stimulus packages to ensure the socio-economic well-being of businesses and people and prevent unemployment and bankruptcies from rising. Local employment can help a destination remain more flexible and take advantage of being able to more easily adapt to rapidly changing situations.

The importance of all stakeholders at a destination working together and including their interests in crisis management is highlighted in the monograph and may be seen as a key factor in managing the COVID-19 crisis. Poor tourism management in the form of weak cooperation between government and stakeholders, a lack of control and unimplemented measures are serious weaknesses in

times of crisis. Incremental measures at different stages of the crisis and relevant tourism policy decisions should be based on scientific evidence while also engaging the stakeholders. This can help businesses recover better and initiate the recovery of the entire destination. Conducting a stakeholder satisfaction survey and a visitor survey to measure the perception and effectiveness of the crisis communication could be very useful by way of feedback for destinations.

Countries and destinations must be able to diversify their tourism offerings and adapt their products and services to better fit the current situation and future changes in demand. One of these changes includes a stronger focus on domestic tourism, which is set to become ever more important for most destinations in the coming years. This means measures are needed to stimulate domestic tourism, such as offering some kind of financial incentives for residents to spend their holidays in their home country. Moreover, season-dependent destinations are more vulnerable as demand has shifted in response to the COVID-19 situation. Destinations should namely also actively pursue deseasonalisation policies to minimise the risk of the current and future crises. Tourism products and services in the off-season can be developed based on outdoor sports and active tourism, cultural tourism, health tourism, gastronomic tourism etc.

Digitalisation has become even more important during the COVID-19 crisis and must be incorporated directly into the day-to-day operations of businesses, organisations and the public sector, especially with a focus on digital marketing that targets domestic and regional markets (»staycations«). Digital is one way of staying in people's minds during the travel bans through marketing campaigns, websites and social media platforms. More proactive destinations offer a wide range of online presence, which helps with a speedy recovery and remains useful once the situation returns to 'normal'.

Safety has been critical during the pandemic. Many destinations have opted for complete closure. Upon reopening, the health of tourists, locals and tourism workers must be ensured. The attracting of tourists will be associated more than ever with the level of safety, cleanliness and sanitation a destination or district provides. Policies need to be established regarding safety, cleanliness and sanitation. A high level of sanitisation and hygiene is likely to remain a competitive advantage even after the COVID-19 crisis is over.

Some actions may aim not only at overcoming the crisis, but also at reinventing the business in the direction of sustainable development due to the prospect of disrupting the industry. Destinations have an opportunity not only to recover from the crisis, but to emerge stronger, better, more sustainable and innovative, creating better jobs for local people and encouraging public participation and engagement. Nature-based tourism will continue to grow in popularity as people want more space and less contact with others.

A strength of this monograph is the collection of ideas concerning different responses to the crisis, allowing destinations to consider implementing measures that other destinations have taken. It can help destinations at a different stage of the COVID-19 crisis by seeing how other DMOs have responded. It provides an overview of actions (implemented or planned) around the world, which can also serve as a benchmark for actions in different types of destinations.

At the time of writing in the summer of 2020, much has changed and the reader can make an informed decision about the effectiveness of the proposed measures introduced at the start of the pandemic. A learning mechanism could be established to reflect on the current crisis management and how destinations can become better prepared for such crises. Further research could re-interview the participants to identify the successful policies and see the latest changes to the policies should the pandemic last longer and which countries and destinations have been able to adapt best.

The collection of contributions could serve as a guide for the future while reviewing the relevance of the actions taken in these countries and destinations, as well as a reference for use when addressing future crises. It serves as a reliable, easily accessible source of information on the policymaking process during COVID-19 in the selected countries and destinations.

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