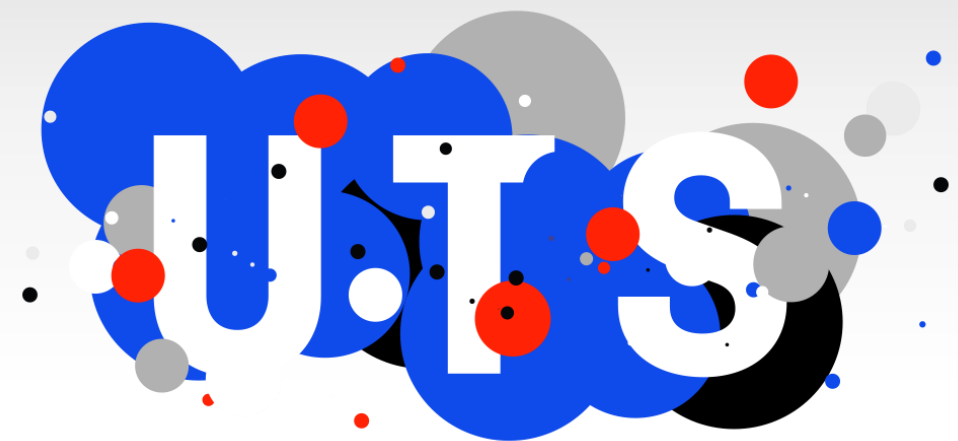


MANAGING RISK AND OPPORTUNITY IN TOURISM: THE IMPACT OF COVID-19 ON GLOBAL TOURISM RESILIENCE

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Tourism: 28 September 2020



CRISIS IN MANDARIN DEFINES THE CHOICES WE ADOPT

Crisis

危機

Danger

Opportunity

HUMAN CRISES

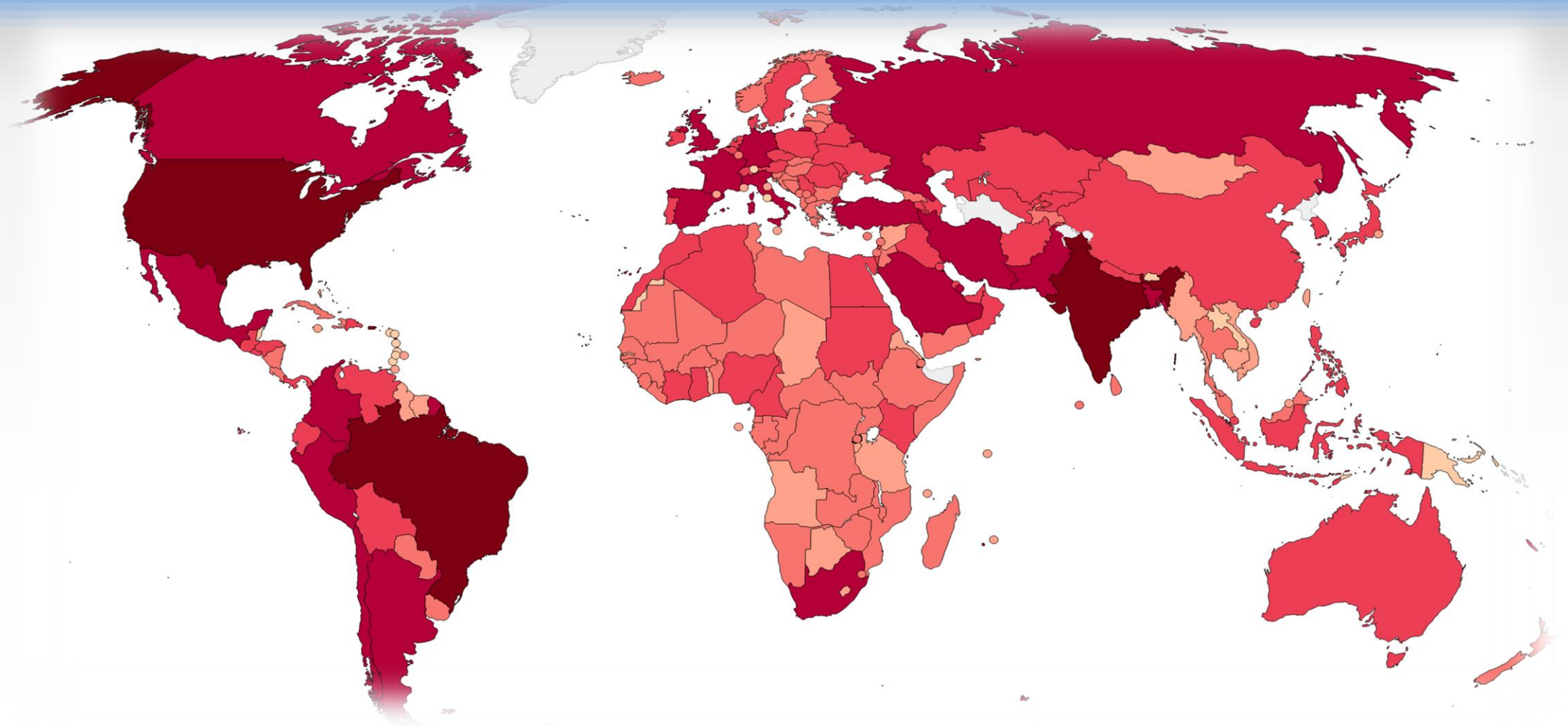
- ▶ Terrorism
- ▶ Crime
- ▶ Technological Failure
- ▶ Own Goals- Management and operational failure
- ▶ Political instability
- ▶ Economic Crises

NATURAL WORLD CRISES

- ▶ Natural Disasters
- ▶ Environmental Crises
- ▶ Medically induced crises/ pandemics
- ▶ COVID-19 (a theme in its own right)

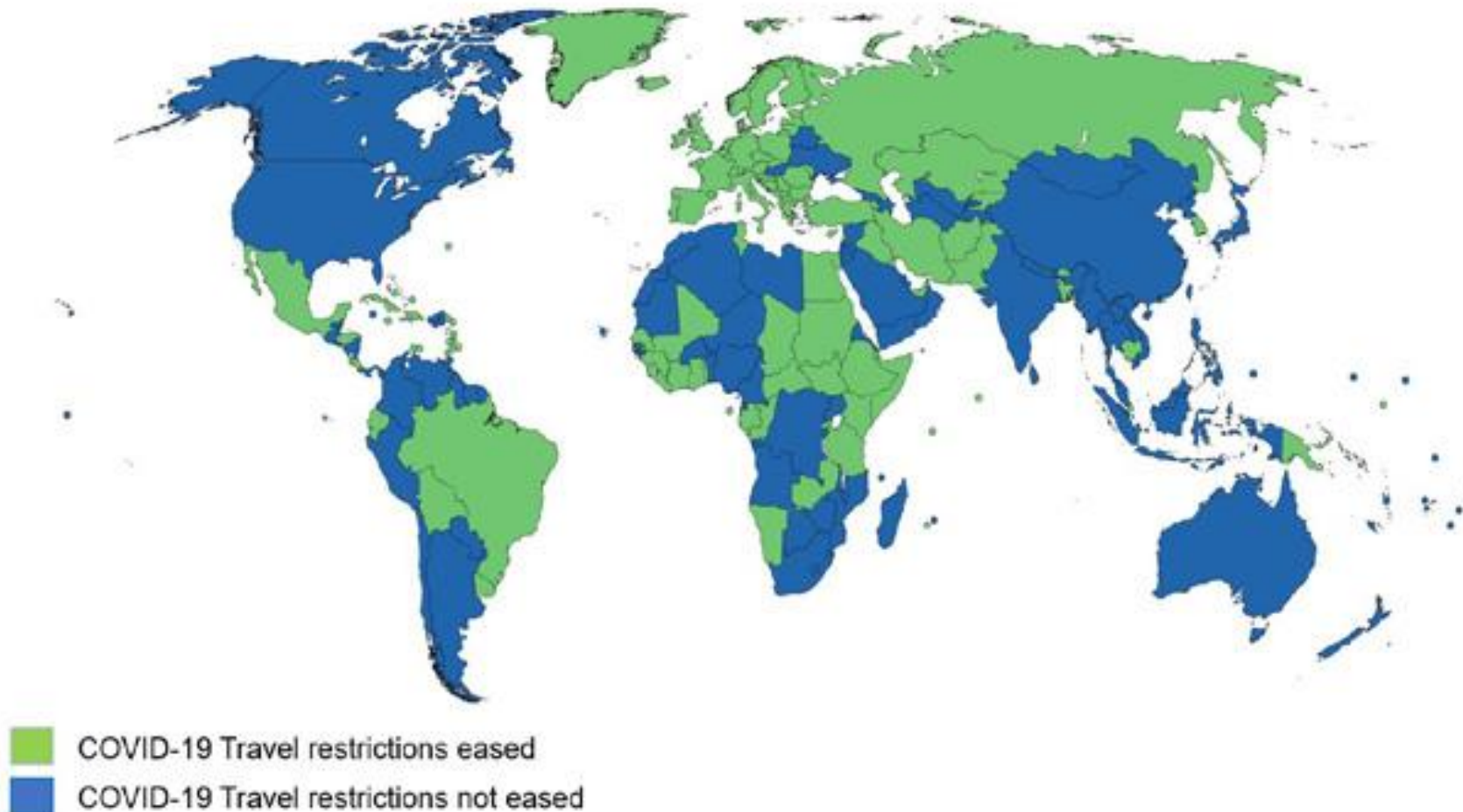
CORE THEMES OF RISK AND CRISIS IN TOURISM

THE GLOBAL SPREAD OF COVID-19 AS OF 15 SEPTEMBER 2020 DARKER COLOURS DEMOTE HIGHER LEVELS OF CASES AND DEATHS



UNWTO MAP SHOWING DESTINATIONS WHICH HAVE EASED TRAVEL RESTRICTIONS AS OF 01SEP, 2020:

SOURCE UNWTO 2020



WHAT MAKES COVID-19 UNIQUE AMONG TOURISM CRISES SINCE WORLD WAR II ?

- ▶ Global Extent of restrictions and limitations on travel and tourism
- ▶ All Sectors of the tourism industry are affected
- ▶ Widespread closures/ quarantine restrictions applied to cross both international and intra-national borders
- ▶ Social distancing regulations which restrict or prohibit social or business events and gatherings involving groups of people

PRE: COVID-19 PARADIGMS OF TOURISM

- ▶ Tourism was set for endless growth
- ▶ Humanity enjoyed a “right” to travel domestically and internationally
- ▶ Tourism was increasingly affordable and socially democratic
- ▶ Tourism was regarded as overwhelmingly desirable by governments
- ▶ Tourism was a growth industry for jobs and economic opportunities especially for developing countries
- ▶ Tourism protected indigenous cultures and the natural environment

COVID-19 TOURISM PARADIGM MYTH BUSTERS

- ▶ Tourism movements heavily restricted globally affecting tourists and tourism businesses
- ▶ Massive job losses in tourism 100 million + in 2020
- ▶ International tourism is only available to the financial and social elite although this may change
- ▶ Health considerations overrule tourism, hospitality business needs
- ▶ Economies heavily reliant on tourism are either in recession or depression
- ▶ The rapid & severe decline in tourism. Recovery will take years.
- ▶ Tourism's fundamental vulnerabilities have been exposed.
- ▶ Sustainability has been enhanced by the absence of tourism in some destinations

MODELS OF MANAGING COVID-19 IN COMMUNITIES: OPEN CONTACT-LOCKDOWN

IMPACT OF THESE MODELS ON TOURISM

SWEDISH Model open contact

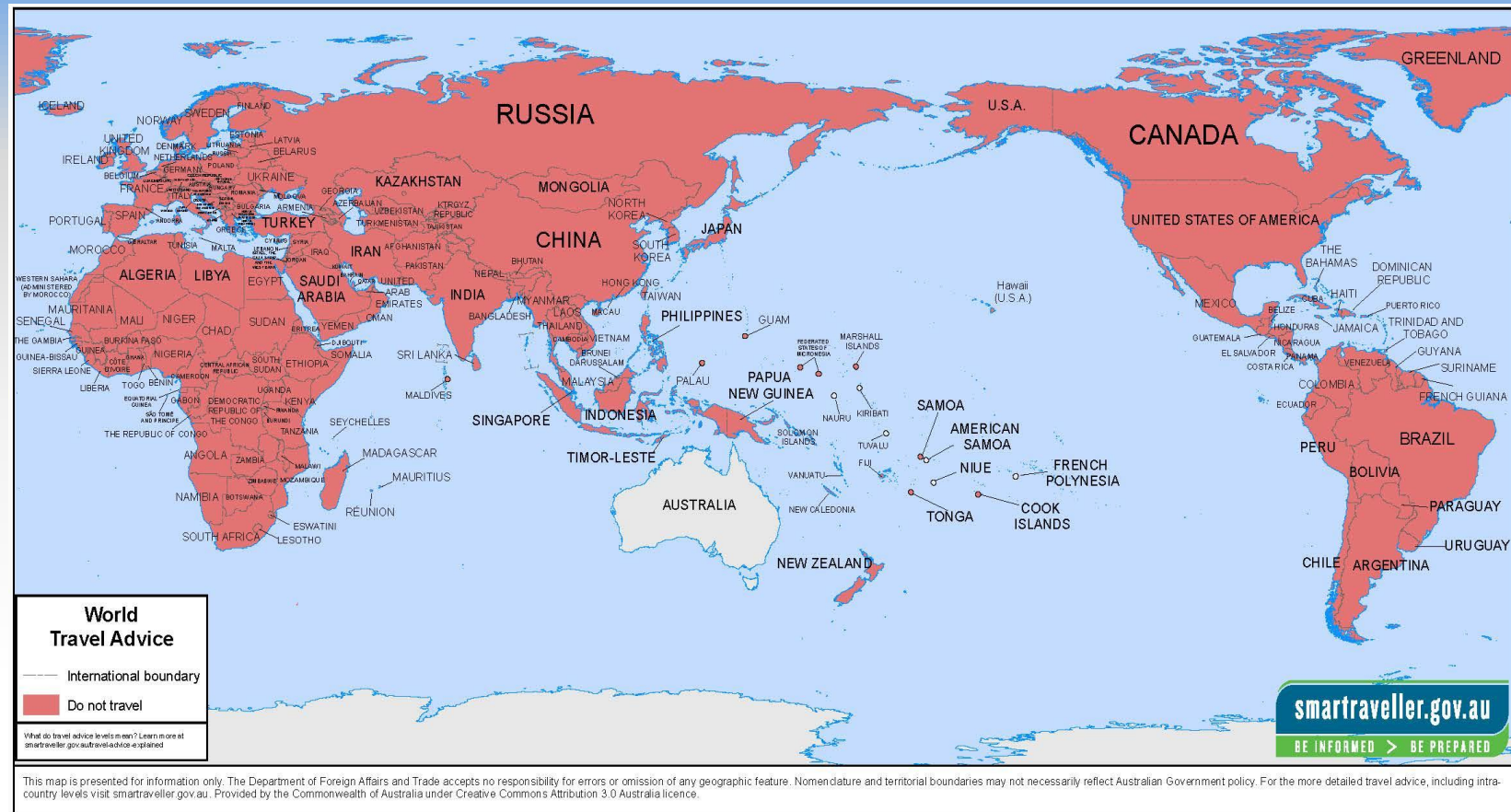


VICTORIA (Australia) Lockdown

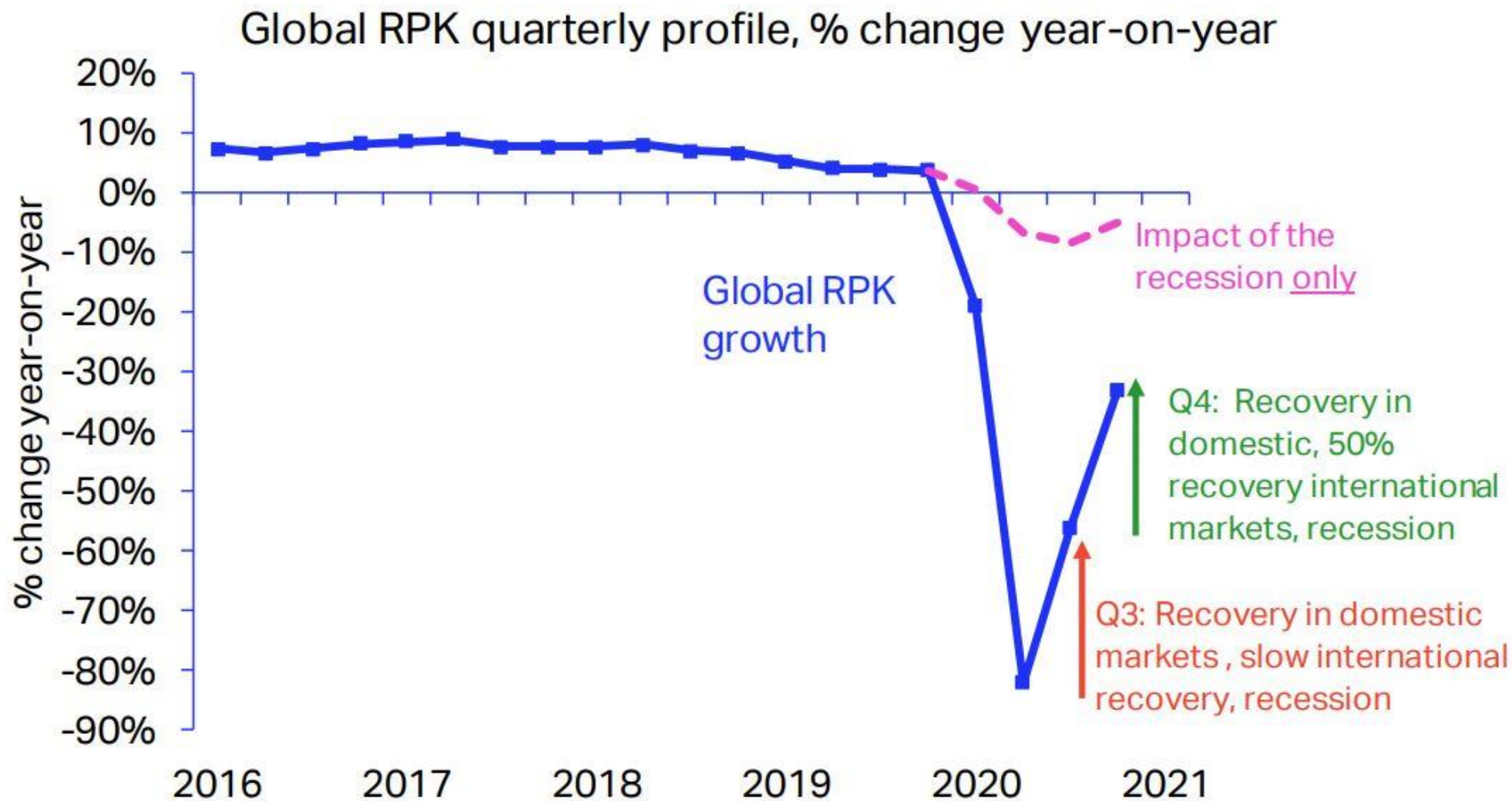


COVID-19 THE MOST SEVERE CHALLENGE TO THE VIABILITY OF GLOBAL TOURISM SINCE THE SPANISH FLU OF 1918-19. SINCE MARCH 25, 2020 AUSTRALIAN TRAVELLERS HAVE BEEN SUBJECT TO AN INTERNATIONAL **TRAVEL BAN FOR TRAVEL EX AUSTRALIA**

- Note that since late March, 2020 DFAT has **banned** Australian citizens except for certain exemptions from travelling to any international destinations.



THE IMPACT OF COVID-19 ON AIRLINES GLOBALLY



Source: IATA Economics, Oxford Economics

TOURISM BUSINESSES ARE UNDER SIEGE HOW CAN THEY SURVIVE ? SHORT AND LONG TERM

Key themes:

- ▶ 1. Maintaining and developing cash flow and financial equity
- ▶ 2. Access government support from all tiers of government
- ▶ 3. Diversify and innovate the business
- ▶ 4. Use the downtime for planning, strategic development training and staff development.
- ▶ 5. Prepare for the business resurgence which will follow the virus
- ▶ 6. Special challenges for business travel and the inroads made by IT during the Pandemic

SPECIFIC CHALLENGES FOR TOUR OPERATORS

- ▶ Focus on a product you CAN market
- ▶ Pivot towards domestic tourism and “alternative product”

during the Pandemic

- ▶ Work closely with your principal suppliers to prepare for the opening of borders to your key destinations and explore alternative ‘viable’ destinations
- ▶ Communicate with your core clientele about programs they can buy now and what is available soon
- ▶ Keep the travel dream alive to your staff, stakeholders and clients



- ▶ Over tourism under control (temporarily)
- ▶ Environmental recovery (fewer emissions)
- ▶ Travellers forced to appreciate the attractions in their own region
- ▶ Increased focus on carrying capacity
- ▶ Outdoors and eco-tourism boom
- ▶ Innovative and virtual tour product which operates within COVID-19 restrictions
- ▶ An opportunity to re-plan and re-think tourism

TOURISM'S SILVER LININGS AROUND THE DARK CLOUD OF COVID-19



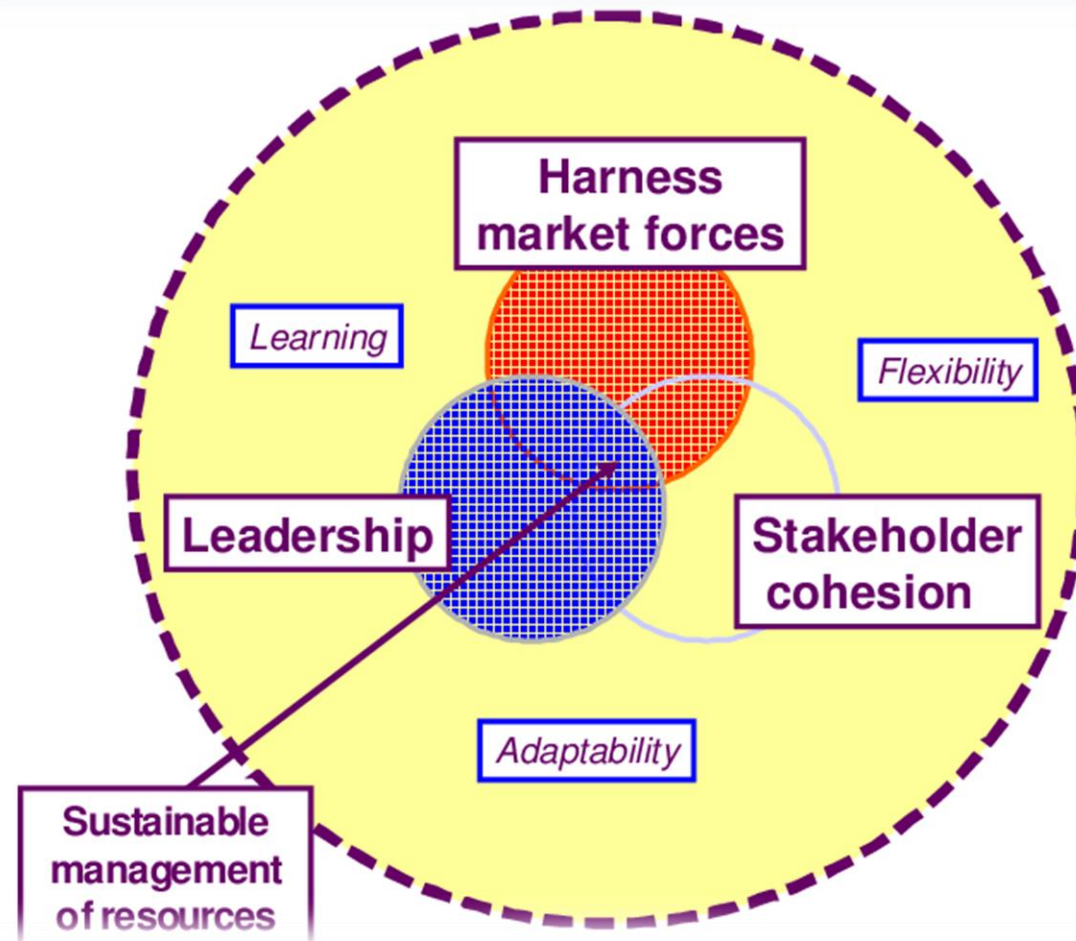
TRAVEL BUBBLES/CORRIDORS

- ▶ Travel bubble operate widely in Europe with variable success
- ▶ However, they come with many limitations and conditions
- ▶ Are there sustainable bubbles which will minimise the tourism footprint?
- ▶ In some European countries resuming travel has been accompanied by a pandemic resurgence



THE CORE CONCEPT OF BUSINESS RESILIENCE

SOURCE COCHRANE (2010)



SUCCESSFUL POST PANDEMIC TOURISM RECOVERIES

- ▶ 2003 PATA's Project Phoenix facilitated recovery in Asia from SARS
- ▶ 2009-10 H1N1 (Swine Flu) vaccination + Effective crisis communication reduced H1N1 from a crisis to a hazard
- ▶ 2016-2017 Zika in Brazil and the tropical Pacific. Isolating the problem and contextualising the condition and communicating preventative treatment

SUSTAINABLE TOURISM RESILIENCE FRAMEWORK

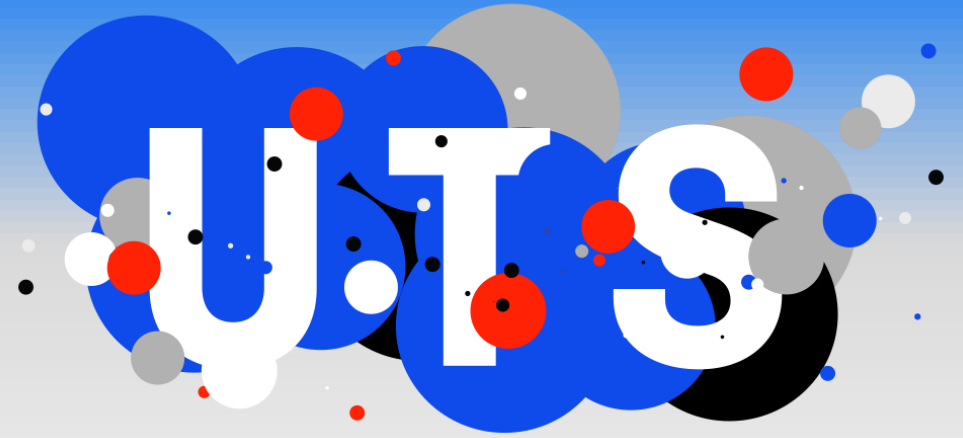
CALGARO ET AL 2014

Shock and Stressor Characteristics	Exposure	Sensitivity	System Adaptiveness
Type of Disaster/Crisis	Population Size and Distribution	Tourism Specific Sensitivity	Impact and Coping responses
Magnitude	Biophysical Environment	Seasonality, source markets, destination history and image	Adjustments and Adaptation
Frequency	Natural terrain	Economic issues	Technical
Duration	Climate	Degree of economic dependence on tourism	Behavioural
	Ecosystem characteristics	Haman and Social	Business Management
	Use of natural resources	Enterprise and Employee skills, risk management capability	Policy : Government and private sector
	Built environment	Physical environment	Research and Education
	Settlement location	Access to natural resources. Quality and extent of Tourism Infrastructure	
	Development patterns, type and location	Governance Processes Responsibility, legal, cultural, tourism networks, government stability	

- ▶ Inter- sector unity of purpose. We are all in this together
- ▶ Internalising the lessons learned. Can we still continue to be a high volume low margin business? How do we maintain the sociability of travel without compromising health ?
- ▶ **The centrality of sustainable tourism in post pandemic tourism**
- ▶ To what extent can we restore the human rights dimension of tourism ?
- ▶ No sacrificing of sustainability for quick bucks
- ▶ Restore the reputation, appeal, trust and sustainability of tourism

CORE PRINCIPLES FOR GLOBAL TOURISM RECOVERY

THANK YOU QUESTIONS WELCOME



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