Smart Regions Group

Tourism - ways of adapting to the COVID-19 pandemic

February 2021
Authors:
Dr. Marta Jacuniak-Suda (Weser-Ems Region, Germany)
Dawn Marie Syvvertsen (Vestfold og Telemark, Norway)

With contributions of:

Marc Klinke, Ostfriesische Inseln GmbH, Germany
Jörg Wilke, Oldenburgische Landschaft/Northern Institute of Thinking, Germany
Arron Wilde Tippett, Norwegian University of Science and Technology, Norway
Christine Rew, Aberdeen Art Gallery, Aberdeen City Council, Scotland
Fredrik Lindén, Marie Linde, West Sweden Tourist Board, Sweden
Grant Zhu, Hubei China Travel Service Co., LTD, China
Cristina Núñes Cuesta, NECSTour, Belgium
## Contents

1. Introduction ........................................................................................................................................... 4  
2. Regional examples ................................................................................................................................ 5  
   2.1. East Frisian Islands GmbH, Germany .................................................................................... 5  
   2.2. Wesermarsch County and Oldenburg, Germany ...................................................................... 6  
   2.3. INTERREG B Prowad LINK ...................................................................................................... 7  
   2.4. Aberdeen Art Gallery, Scotland ................................................................................................. 9  
   2.5. West Sweden Tourist Board, Västra Götaland, Sweden .......................................................... 10  
   2.6. Hubei China Travel Service Co, LTD, Wuhan, Hubei Province, China ................................. 11  
   2.7. Perspective of the Network of European Regions for a Sustainable and Competitive Tourism (NECSTouR) .................................................................................................................... 12  
3. Key findings ............................................................................................................................................. 13  
4. Recommendations ................................................................................................................................. 15  
5. Potential ideas for future cooperation projects ..................................................................................... 16  
6. Acknowledgments ................................................................................................................................. 17
1 Introduction

This report summarises the findings of the webinar held on December 2, 2020 in the CPMR/ North Sea Commission Smart Regions Group. The aim of the webinar was to learn how enterprises, local authorities and tourism organisations have coped with the COVID-19 pandemic. Specifically, the focus was on the exchange of experience on current challenges, government schemes and innovative solutions developed so far. The report presents best practices and provides recommendations on possible adaptation measures. The target group are representatives of the hospitality sector, cultural institutions, municipalities, politicians and administrative staff.

The webinar focused on the following questions:

- To what extent have tourism organisations, cultural institutions and businesses been affected by the pandemic?
- What kind of measures have been taken /solutions developed?
- What kind of support do they expect from the local/regional authority or national government?
- What lessons learned can be drafted for the future: On the way to smart recovery of tourism? Coming out stronger from the crisis?

According to the World Tourism Organisation (2020\(^1\)), tourism is one of the world’s major economic sectors with very labour intensive services such as the provision of accommodation and food services industries. Furthermore, the tourism sector has an important multiplier effect on other employment sectors such as agriculture, transport, food, beverage and retail, and is, therefore, particularly important to regional economies.

Tourism is one of the sectors most affected by the COVID-19 pandemic. The impact of COVID-19 on tourism has been existential, devastating employment, businesses and livelihoods across the sector. For example, women, who make up 54% of the tourism workforce, young people and workers in the informal economy are among the most at risk groups. Small businesses are particularly vulnerable. The COVID-19 pandemic has not only impact on tourism in terms of the economic sector as such, but also on nature, biodiversity preservation and cultural heritage, partly due to the decreased presence of staff and visitors reduces funding. The impact of the COVID-19 pandemic on tourism places further pressure on heritage conservation, as well as on the cultural and social fabric of communities. For instance, many intangible cultural heritage practices such as traditional festivals and gatherings have been halted or postponed, and the markets for handicrafts, products and other traditional goods have been closed.

The World Tourism Organisation (2020) estimates that 90% of countries have closed World Heritage Sites. Besides, 90% of museums closed and 13% may never reopen. According to newer statistics, Europe recorded a 70% decrease in arrivals, despite a small and short-lived revival in the summer of 2020. The region suffered the largest drop in absolute terms, with over 500 million fewer international tourists in 2020.\(^2\)


The figure 1 shows the number of nights spent in tourist accommodation establishments in the EU, such as hotels, holiday and other short stay accommodation and camping sites in 2020 compared with the same months of 2019. The most substantial reductions in the number of nights spent in tourist accommodations were recorded in April (-95%) and May (-89%), at the very beginning of the holiday season. In the summer period, there was only a partial recovery. From January to August 2020, the number of nights spent in tourist accommodation establishments in the EU totalled 1.1 billion, a decline of 50% from January-August 2019.

Fig. 1. Comparison of nights spent in tourist accommodation establishments in the EU in 2019 versus 2020 (EUROSTAT 2020)

Despite the negative implications of the COVID-19 pandemic on the tourism sector, a number of SMEs and cultural institutions have gradually developed strategies on how to cope with the lack of visitors and income. The examples from selected CPMR/North Sea Commission member regions presented in chapter 2 provide some encouraging ideas about how to adapt to the difficult circumstances during the pandemic.

2 Regional examples

2.1 East Frisian Islands GmbH, Germany

The East Frisian Islands GmbH was set up in 2017 as an umbrella organisation for seven island municipalities (Borkum, Juist, Norderney, Baltrum, Langeoog, Spiekeroog und Wangerooge) and six shipping companies (AG EMS, AG Norden-Frisia, Baltrum-Linie GmbH, Schifffahrt Langeoog, Schifffahrt Spiekeroog und Schifffahrt Wangerooge). The aim of the organization is to make the islands’ amenities more visible to potential visitors and promote the region as an internationally well-known holiday resort. The seven islands belong already to the top tourist destinations in Germany. Before the pandemic, the average gross turnover was 1 billion Euros per year. The tourism tax paid by visitors forms the main income for the seven island municipalities. However, with the pandemic restrictions and the lockdown in the spring, autumn and winter led to the complete loss of income. Especially difficult was the lock-down during the Easter period for seven weeks, as it forms a financial cushion for the winter season, when the income is the lowest.

As the lockdown was implemented, the East Frisian Islands GmbH turned to short-time work to prevent layoffs. Further, changes in marketing were introduced such as events had been relocated to take place outside, social distancing measures were put in place, and some other events were postponed to the next season. Visitor management turned to take place digitally. For example, booking websites for each of the seven islands were set up for restaurants, events, cultural and sports venues, sightseeing sites and other amenities, so the visitors could book the service /location for a desired time slot. The website was co-financed 50% by the Ministry for Economic Affairs of Lower Saxony and 50% by the East Frisian Islands GmbH and was launched in June/July 2020, just at the right time in the middle of the pandemic. An example of the booking system for the island of Spiekeroog can be viewed here: https://reservierung.spiekeroog.de/
The long-term running cost of the booking websites are covered by the East Frisian Islands GmbH.

In Germany, the Government promised to provide financial help for the hospitality sector very quickly. However, it was not clear how much financial aid the island municipalities would receive and when they would receive the aid, as the operations cost had to be covered. The seven islands mayors posted a video message to the State Minister for Economic Affairs of Lower Saxony in order to draw attention to the challenges faced by the seven islands and shipping companies. The video can be watched here: https://www.youtube.com/watch?v=W0wGKeR5KgY

The expectations of the East Frisian Islands GmbH include the Government’s compensation for lost sales and increase in funding rates. In addition, the communication of the planned restrictions should take place sooner to avoid confusion among visitors, who have already booked their holidays on the islands. So far, six island municipalities have received the promised financial aid according to the number of the overnight stays in 2019 in the municipalities.

There are a number of lessons learned from the pandemic so far. First, digitalization must be pushed further in terms of developing new offers and improving the digital skills of staff. Second, pandemic plans have been developed and now they have to be implemented (e.g. hygiene schemes). Third, the cooperation between service providers and municipalities needs to be improved. Finally, due to the impacts of the pandemic, it has become evident of the important role that tourism plays in the society.

2.2 Wesermarsch County and Oldenburg, Germany

The presentation was given by Jörg Wilke who works for the cultural association called Oldenburgische Landschaft and the Wesermarsch County Council in the Interreg B Project CUPIDO. The project’s overall objective is to develop new business opportunities in the cultural heritage sector around the North Sea.

In times of the COVID-19 pandemic, all regional cultural institutions and networks linked to the Oldenburgische Landschaft suffered from the lack of visitors to museums, galleries, show case centers and exhibitions. Museums, for example, have been closed suddenly at the first lock-down in spring and been opened again for a short period in summer. With the beginning of the second lockdown in November, they had to close again.

The museums in the region have developed a different approach on how to keep in touch with the public. For example, the Horst-Janssen-Museum in Oldenburg offers phone calls with individuals as a medium to guide them through its collections. In advance, the museum sends out a booklet with the description of objects that will be presented during the phone call.

In March 2020, Oldenburgische Landschaft has set up a pilot project named “Deichkultour”, a social media platform for targeting young people in rural areas. The aim of the pilot was to increase the awareness of the regional cultural institutions among young people. “Deichkultour” was a cooperation with Jade
University of Applied Sciences Wilhelmshaven and a degree course in media management and journalism and was co-founded within the framework of CUPIDO. In total, 20 students participated in the pilot and created entertaining and informative video and audio contributions about the museums in Friesland and Wesermarsch, on “their” social media platforms.

Due to the necessary protective measures during the COVID-19 pandemic, the museums were closed for visitors when the project started. It was therefore not possible for the students to take pictures or make videos in the museums. Instead, all the communication in the project took place from the end of March to June via video conferencing. These restrictions were a challenge for the students, but finally they launched several self-made films and podcasts and presented these on Instagram (Posts / Stories), Spotify (Podcasts) and YouTube (VLOG / Podcast).

Further, the students developed an analysis of the target group, user behavior and the channel characteristics of the three chosen social media platforms. They created weekly evaluations and documentation of the editorial work with final suggestions for optimization, e.g. how much there was interaction on posts, stories or which schedule optimization for posts, video and podcast episodes. Posts by “Deichkultour” on YouTube can be viewed here: https://www.youtube.com/channel/UCvMsasiegQ9XhfeiDrsn5iw

For all types of cultural institutions and self-employed workers, it is essential to get financial help/state aid. Since it took a long time to recover in the aftermath of the first COVID-19 pandemic wave, the national government and the federal state government are providing more help to compensate the loss of income. Especially for cultural institutions, financial help in smaller budgets are available. Oldenburgische Landschaft itself is distributing financial help for other regional cultural institutions.

Lessons learned from the pandemic include more frequent use of new tools in digital communication, which were thought to be less relevant before the crisis. They help to stay in contact with staff and visitors and keep the social network alive, although they cannot replace contacts in real life. The pandemic helped to acquire more digital competences and the use of digital tools in everyday working life.

After initial reservation, digital conferences during the CUPIDO project meetings turned out to work very well and have a new special dynamic.

2.3 INTERREG B Prowad LINK

Interreg B Project PROWAD LINK aims at engaging small and medium-sized enterprises in nature conservation. As a result of the project, innovative tools and strategies will be developed and tested to improve access to nature heritage brands, enhance sustainability efforts and develop innovative marketable offers.

In his presentation, Arron Wilde Tippet reported specifically on the challenges during the COVID-19 crisis faced by the companies from the tourist sector, the solutions they have developed and resources that have helped them to develop and implement these solutions. The scope of the study covered three nature protected areas: Geirangerfjord, North Norfolk Coast & the Wash and the Wadden Sea.

Challenges

The main challenge for the enterprises interviewed was the difficulty in understanding the government advice and predicting what would come next. In the UK in particular, enterprises found the government to be increasingly uncertain by changing advice regularly and publishing guidelines very late into the crisis.
Space was a key challenge with some businesses offering a physical product as it was difficult for them to ensure that the required “social distance” between the customers would be kept. Supply chains, particularly those not in the local area, were an issue for companies, sourcing of protective equipment and packaging for products was difficult.

Furthermore, certain aspects of the businesses which were targeted at new/existing customers such as tours of buildings, indoor/outdoor music events, had to be put on hold.

In order to keep the enterprises afloat, some owners/managers decided to either go back to a 2nd job or engage more with their second job. As a result, they were put under a great workload. Developing new solutions and implementing them meant that some owners/managers were working much longer hours than before the crisis.

**Solutions**

The solutions developed and implemented by the enterprises had a wide range, depending on restrictions in the respective countries.

One of the most pronounced examples was a brewery who changed almost overnight from selling primarily to pubs and restaurants in the local area (B2B, business to business) to selling to individual customers across the UK (B2C, business to customer). In order to do this, they had to already know the processes involved in making and selling the individual customer product. Since they were engaged in producing products for both the B2B and B2C market already, they were able to make the switch. In terms of social capital, after the switch to individual customers they experienced issues in sourcing glass bottles. Their strong connections within the community meant that, during the crisis, more of their customers were returning their bottles. In terms of natural capital, the brewery used berries and herbs collected from the local natural environment as a raw material in their beer, they received higher volumes of these raw materials during the crisis, also due to their connections with the community which helped with the harvest of berries and herbs.

The effects of COVID-19 policy on social distancing meant that indoor tours were out. The brewery decided to bring the customer to them safely by offering a drive-through service to purchase beer, they also created a pop-up pub directly outside their brewery to allow people to continue to engage socially, but at a distance.

A cheese producing company chose a similar approach. The cheesemaker lost many of her restaurant customers during the crisis and had to focus on selling to local shops and individual customers. There was a rise in home delivery services offered by small local entrepreneurs which she was able to take advantage of by offering smaller portion sizes of cheese at a higher cost per kilo, this was to incorporate additional labour costs. In order to build up her customer base, she has focused on wealthier 2nd homeowners who have moved to the area to escape the risk of infection in urban areas. As her doors were closed to the public, she used community spaces to promote her product to the new customer base. She recently ran her cheese cabaret event to promote the local area to 2nd homeowners and retirees, providing samplings of her product to gain new customers. Her sales this September were up on last year, so she has been able to benefit from her solutions.

In another case, an activity company started offering meditation tours for individuals during the crisis. In terms of parallel processes, they already had stress relieving tours for vulnerable people and therefore had experience of this type of offer. They relied on their positive relationships with the media, taking them on the tour to promote the offer in the national newspapers. The activity provider was severely affected by limited space on his boats, so developed a new offer linked to the Corona virus focusing on individual meditation tours. He used his relationships with certain national media outlets to promote the new offer for free. The company also used natural capital as a selling point for their new offer: the serene and calming environment.
Summary

Many of the enterprises interviewed were engaged in multiple activities before the crisis. This ranged from offering a variety of products or services, such as different types of tourist activities, different types of accommodation, a mix of accommodation and catering, products aimed at businesses and products for individual customers. This variety of products and services made switching between them a possibility. They did not have to develop new solutions, rather they were able to use their existing experience and build a product/service that worked during the crisis.

Although all of the enterprises were struggling financially in the crisis, one resource that many of them had access to was space, whether it was external, in terms of community space or internal. This gave them room to develop solutions which may not be possible for a business operating in urban areas.

The furlough system (temporarily laying off of staff) helped the enterprises immensely with many indicating they would not have survived without this system. Although this type of scheme was already in place for many countries in Europe, in the UK it was new and thus very well received.

2.4 Aberdeen Art Gallery, Scotland

Aberdeen Art Gallery sits in an important civic space in the heart of Aberdeen city centre. The Gallery is one of 7 venues fully funded and operated by Aberdeen City Council’s Archives, Gallery & Museums service and both the building and the collections it holds are owned by the Council. Around 50% of our visitors come from the local area with 21% from overseas, especially from Europe and Scandinavia on a combination of city breaks and business travel; the remainder come from the rest of the UK.

Before the global pandemic forced us to close to visitors on 18 March 2020, the Art Gallery had been open for just over 100 days following the completion of a landmark £34.6 million redevelopment between 2015 and 2019. The Art Gallery is now a key destination in the city’s rescue plan which brings together several local agencies and organisations to jointly work on strategies encouraging footfall back to the city centre, to support local businesses and to tackle unemployment.

With the implementation of a lockdown we had to rethink our activities. How would we connect with visitors when our buildings are closed? How could we maintain the excitement of our outstanding collections of art and history whilst physically distant from our audiences? As the doors to the actual collections closed, like many museums we turned to digital solutions. We established our Museum from Home page to share content aimed at different audiences and to allow visitors to explore the treasures in our collections safely from the comfort of their own homes and also used programmes such as Smartify. Our learning team had welcomed hundreds of pupils to the Art Gallery between November 2019 and March 2020. When home schooling arrived they turned to Google Classroom, developed new resources to share online, and have taken their CPD sessions online. The pandemic pushed us into learning more digital skills and reinforced our resilience as a team; staff now work closer together to deliver a more varied digital presence. Website usage increased by over 4,000 a month, our Facebook reach has increased by 5,700 and Twitter by 2.2M. Going forward, we will retain a hybrid approach – encouraging local audiences who can safely visit the venue and placing exhibitions online for those who cannot travel.

When Scotland began to come out of lockdown in the summer of 2020, we prepared by attending webinars and applying for the Good to Go accreditation standard, which gives visitors confidence that a tourism venue has appropriate COVID-19 measures in place. We were keen to understand what our visitors expected and the level of anxiety they might feel. A visitor questionnaire accessed via the Council’s website was hugely important in the planning process. 887 responses were received with significant numbers stating that they would expect advance booking in place along with social distancing measures. We based a number of our adaptations on the results of the questionnaire, such as reducing visitor capacity to about
20% of previous and introducing an online advance booking system to complement immediate entry using a QR code. Some changes were made to the layout of the building including a new temporary entrance and separate exit. New directional signage was introduced to minimise the risk of crowding in corridors and the café is table service only. Hand sanitising stations are located throughout the building. Access to all digital and more traditional interactives ceased to reduce touch points. We were initially concerned how the visitors would react to this, but many have reflected that they have engaged more with the paintings and objects on display.

The pandemic reinforced that Collections are our core business – they tell stories and histories and demonstrate skills, inventiveness and creativity. At this extraordinary moment in our shared experience, we are aware that the issues which concern many now need to have a presence within our future collections. Many of our staff kept photo diaries recording how they juggled home schooling, working from kitchens, dealing with distractions like pets and learning an entire set of new skills. This inspired us to launch an appeal to local people to help us build a COVID-19 collection of photographs and objects which have current significance.

As we emerge from the virus, discussions have commenced with other galleries about how to lend works of art and tour exhibitions safely by using digital applications to supervise the travel and condition check loans remotely rather than in person.

One of our challenges has been accessing wider financial support for recovery. With fewer visitors we have lost our main sources of income generation – ticket sales, shop, café, venue hire. We are not eligible for a number of government initiatives, but have had some success with smaller funding opportunities - to purchase digital equipment for staff for example. Most grant schemes involve a competitive application process, mainly project driven rather than simply compensating for loss of income, making them time-consuming to develop.

We anticipate that tourism in 2021 will focus on fully independent travellers; small groups and local visitors. With international travel restricted this means that our digital offer is more important than ever to reach all audiences, but equally we are encouraging local people to be tourists in their own area. Along with free entry to our international collections, the Gallery is continuing to work on a covid-compliant programme of exclusive temporary exhibitions of art and design; we also offer opportunities to purchase beautifully designed objects at our Gallery shop and have organised special events such as a Christmas craft fair showcasing and supporting local makers, artists, designers.

Going forward, as we recover from COVID-19, our lives will have changed immensely and there will be a considerable requirement to rebuild the social experience. Success can no longer be measured simply by the number of physical visitors and the cultural sector must develop new metrics. Governments and funding authorities must also continue to recognise the power of cultural venues such as the Art Gallery to aid emotional and mental recovery and provide citizens and tourists alike with the spaces and opportunities to engage with culture for enlightenment and pleasure.

2.5 West Sweden Tourist Board, Västra Götaland, Sweden

West Sweden Tourist Board has 30 employees which is owned by Region Västra Götaland. The activities are development and marketing of the destination, providing a platform for cooperation with a focus on sustainability.

The Tourist Board’s support had several initiatives during the COVID-19 pandemic, such as they stopped all international marketing, and started a website and a help desk to give guidance on questions from businesses. They provided financial support to local tourism organisations since their members had difficulty to afford to pay their membership fees. An eight weeks online training programme for tourism businesses in West Sweden was offered from April-May 2020.
The Tourist Board’s Online Training program received 9 million SEK of funding and covered 70% of staff costs for 1-2 people per company. There were 200 renumerated places, and an additional approximately 100 participants per day with 8 weeks, 8 modules/themes, focusing on Sustainability, Hospitality, Events, Social Media, SEO/SEM and Personal Development. The program took place digitally between 14 April – 5 June, 2020 and had 65 speakers.

Their domestic marketing campaigns focused on support to the local businesses, hiking, staycation, small conferences/meetings and gift cards (buy now, enjoy later).

A new EU funded project was developed within the European Regional Development Fund with 6 MSEK in financial support to small companies focusing on consulting services and investments. There was co-financing from The West Sweden Tourist Board. The total budget is 14 MSEK, and the project period runs from 2021-2022 with a focus on sustainable investments.

The Swedish government took a variety of measures to help companies during the pandemic such as offering short-time work allowance, temporarily reduced social fees, offered support based on reduced turnover, no first sick day deduction, sick pay from the government instead of the employer, reduced rent and made it easier to get loans.

2.6 Hubei China Travel Service Co, LTD, Wuhan, Hubei Province, China

The COVID-19 pandemic and lockdown in Wuhan, China greatly affected the tourism industry. All tourism was shut down during the Wuhan lock down period from January 23-April 8, 2020. 2021 is unfortunately not looking promising either for the local tourism industry. Many employees in the tourism industry have been let go, and many tourism businesses have had to close their doors. The businesses need to diversify now.

From April to August 2020, focus was placed on finding opportunities with the new limitations on the tourism industry in Wuhan as a result of the pandemic. There was more interest for the local Chinese residents to visit their own rural areas in the region. The population of Wuhan is 12 million, and the residents were only allowed to travel within the city area. The tourism businesses established cooperation with municipalities in the rural areas and partnered with local villages, farmers, etc. Rural travel has now become popular and successful.

Some of the tourism businesses have changed their strategies and structure by focusing on new markets such as rural tourism, study and research trips for schools, etc.

In August, the “Hubei Province Favor Tour” was developed which offered free admission to local tourist attractions to help stimulate that the local residents would once again gain confidence towards the local tourism industry and have the opportunity to re-discover their region after the lockdown period.

The local and national governments offered a stimulation subsidy to attract more visitors from outside of Wuhan to visit the city. With updates to December 30, 2020, Hubei Province had received 73 million domestic tourists, including 16 million tourists coming from other Chinese provinces outside of Hubei. It is anticipated that outbound business will resume in the second half of 2021. Inbound tourism is anticipated to open up again from Asian countries in the first half of 2021.
2.7 Perspective of the Network of European Regions for a Sustainable and Competitive Tourism (NECSTouR)

NECSTouR is the network of regional tourism policy makers together with universities and sustainable tourism associations: committed to promote sustainability as a driver of our destination competitiveness.

NECSTouR Regions are concerned because the consequences of the pandemic are translated into extremely negative results and the forecast is discouraging: 75% drop of European tourism industry income between February and June, 70% of drop estimated for the 3rd quarter and more than 6 million of jobs at risk, were the figures reported by the European Commission. If domestic tourism compensates in number of visits, it does not bring the expected economic value for the local economy. NECSTouR regions are committed to invest in a better recovery while still performing in “rescue” mode, in order to set the basis for the sustainable tourism of tomorrow brings us also the chance to accelerate the sustainability policies we have already launched and rethinking some priorities and finance those. For this, tourism must be in the agenda and the recovery plans.

Examples of sustainable tourism response to support a greener and more sustainable tourism sector recovery, based on existing policies:

BALEARIC ISLANDS REGION
Balearic Islands commitment before the COVID-19 crisis on fostering greener and more sustainable destinations is reinforced more than ever. The regional recovery plan targets the 3 steps to reply to COVID-19 impacts in tourism: 1st liquidity for enterprises, 2nd developing the protocol for safety tourism travels, mobility and connectivity, 3rd change to the current regional tourism model. The new tourism model will focus on two areas: 1) Greener and sustainable destinations programme by: achieving the tourism transition into a circular economy (better waste management, efficient water management, foster the local goods), and fostering investments in green energy (hydrogen plan for hotels); 2) Digitalisation as a factor for security and safety and sustainability: Smart tourism (enable key technologies for safer destinations) and Innovative projects (tackling the IOT application in the tourism value chain accommodation).

ÎLE-DE-FRANCE REGION
Île-de-France’s Region vision is that in the near future, tourism must be integrated in all Sustainable Urban Mobility Plans in Europe. Because we will not reach the Green Deal targets reducing carbon emission if we do not propose sustainable modes of transport that match the needs of residents and visitors. To start with, the Region’s approach is integrating sustainable mobility as a key driver of the regional sustainable tourism strategy. The importance of offering sustainable mobility solutions door-to-door and the last mile. This is how Île-de-France Region proposes also to tackle over tourism by offering mobility solutions to visiting sites in the metropolitan area and not only located in the urban places. The Île-de-France Region (IdF) is re-thinking the urban and rural public spaces, welcome visitors and offer affordable, accessible multimodal transport packages and integrating new forms of mobility more sustainably. IdF has just launched their new regional tourism scheme which will be implemented from 2022-2026: a deep revision and consultation exercise with all the tourism professionals. And a key target to the recovery for the region will be ready to welcome visitors at the 2024 Olympic Games to offer sustainable tourism, including sustainable mobility solutions.

The next step for NECStouR is to build the European Marshall Plan that the tourism industry deserves. This means mobilise managing authorities to optimise the Next Generation EU package as a unique opportunity to finance tourism regeneration, investing in the green and digital transition and building more resilient destinations and tourism SMEs out of this crisis. NECStouR calls NSC regions to commit to this mission and offers the “vision of European Regions for a sustainable tourism of tomorrow” and a pool of cooperation across European regions to inspire, mobilise and deliver the regional tourism strategies which are needed.
3 Key findings

Although the presented regional examples differ, there are some commonalities in terms of how they have been affected by the COVID-19 pandemic restrictions and adaptation measures they applied. The key findings can be presented in reference to the four initial questions raised in the webinar:

1. To what extent have tourism organisations, cultural institutions and businesses been affected by the pandemic? What are the current challenges?

The lack of income in the hospitality industry and municipalities (tourism taxes) presents the most severe impact of the pandemic as expected. They all faced long weeks of uncertainty related to the scope of the restrictions, the amount of financial aid made available and the challenge to keep in contact with potential visitors and customers. In many cases, staff turned to short-time work to prevent layoffs, but at the same time, management staff was confronted with huge workloads related to internal crisis management, as well as dealing with visitor management. The COVID-19 pandemic had also devastating impacts on education and the society, as touristic venues such as museums and visitor centers are hubs for the public (local visitors and tourists equally) to gather, exchange, learn and find inspiration.

In particular, the communication of restrictions between the various levels of government, and also to SMEs was confusing. The guidelines on restrictions changed regularly and were often published very late into the crisis. The media spread news on restrictions that were new to the municipalities and enterprises, which often caused an information chaos and confusion amongst visitors who previously had booked holiday travels.

2. What kind of measures have been taken /solutions developed?

In all cases, events have been relocated to take place outdoors, social distancing restrictions and signs were put in place, some events were postponed to the next season. Specifically, visitor management turned to take place digitally, for example, booking websites for restaurant reservations. Museums and sightseeing sites were set up digitally. Cultural institutions including museums have organized podcasts and virtual tours to the places of interest or through their collections. A lot of sources were shared online. SMEs and cultural venues started to sell their products online or put “click and collect” services in place. One example of this is, Aberdeen Art Gallery who quickly tried to solve the dilemma of “How to connect with their visitors when their buildings were closed during the pandemic.” Visitors were able to experience cultural events from the comfort of their own homes during the pandemic period through digitalization and the development of new online tools, such as a webinar series, digital art museum collections, including sharing of collections digitally with other galleries, etc. Digital skills have been increased and team resilience has also resulted. There has been evidenced significant increases in online visitors to their social media sites and websites. They have also been able to reach out to a wider geographic area through digitalization. Funding was available to invest in digital tools such as ipads, etc. Digitalization was an effective tool to train more widely in digital skills, for example through recordings of digital upskilling for staff members.

In particular, the cooperation with local residents have proven to provide an important support in the pandemic. Local residents collecting herbs and berries for the production of beer in the Wildcraft brewery, or the involvement of students in the Wesermarsch Region in producing podcasts on local amenities are outstanding examples of an innovative response to the restrictions. In general, many organisations shifted their focus towards the local community as recipients of their services and products. For example, the Aberdeen Art Gallery had an excellent idea to build a collection of photographs and objects of local people that reflect living and working conditions during the COVID-19 pandemic. Another interesting measure was
conducting a large series of questionnaires, webinars and coaching sessions that aimed to learn more about visitor’s interests and needs and finally helped to elaborate a tourist offer for 2022.

The video message from the Municipality Mayors to the Ministry of Economics published online presents a successful measure raising awareness to the challenges faced by East Frisian Islands municipalities to the high level politicians.

West Sweden Tourist Board had a strong focus on sustainability. They stopped all marketing activities and worked diligently with programs and guidance to local businesses. Local attractions became a main focus such as hiking and local hotel packages which proved to be very popular.

The tourism sector in Hubei Province in China focused more on developing rural tourism in their province since their borders were closed to inbound and outbound visitors. This proved to be highly successful with new opportunities for farmers, villages and their rural businesses. They also focused on study and research trips for schools.

3. What kind of support has the tourism sector received and what are the expectations? What kind of support do they expect from the local/regional authority or national government?

Although the affected SMEs and municipalities have received financial support, they expect an increase in funding rates. In addition, they call for clearer communication of the planned restrictions and further governmental advice, so the mitigation activities can be developed and implemented faster. The purchase of digital equipment is costly and requires additional financial support. Many schemes, however, involve competitive applications and tendering processes and are time-consuming to develop by staff who are available mainly only part-time. Simplifying application procedures would be very helpful. Some regions experienced that most of the COVID-19 funding applications were project based, and not necessarily based on income loss.

Hubei Province local government authorities offered a variety of subsidies to help stimulate the tourism sector. Subsidies were available at the local, provincial and national governmental levels. They also offered subsidies for a period where cultural attractions were open for free to the public to stimulate visits by the local citizens once again after a lengthy lockdown period.

4. What lessons learned can be drafted for the future: on the way to smart recovery of tourism / Coming out stronger from the crisis?

A number of lessons learned can be identified. First, the pandemic showed that tourism plays an extremely important role for local and regional economies. It is also important for the society in terms of education, personal development, life quality, freedom to move and the possibility to explore natural and cultural amenities around the world. Governments must continue to recognize the power of cultural venues and nature destinations as the source of social interaction, intercultural exchanges and integration. The fragility of ecosystems, heritage sites and cultural collections, but also of those who are employed in the tourism sector and live in touristic areas must be seriously considered in decision-making processes, in order to ensure that future generations can equally enjoy and profit from tourism.

During the webinar, all speakers were clear about the key importance of digitalization. Many SMEs and other organisations started operating digitally and by doing so they have managed to keep in touch with potential visitors and customers. As a result, they have partly compensated the loss of income. The variety of products and services provided digitally helped to overcome the worst financial difficulties. However, connecting to the local communities and focusing on local residents as a target group was equally important. In the future, digitalization must be pushed further in terms of more qualitative, virtual offers, digital tools and, equally important, the improvement of digital skills of staff.
Even if digitalization has proven to be a kind of remedy in the crisis, there will be considerable requirements to rebuild the social experience, a key element of tourism activities, both indoors and outdoors. The COVID-19 pandemic has led to the increase of mental and physical diseases, not only as an effect of virus infection, but also as an effect of long-term social isolation. Sustainable leisure activities can accelerate mental, emotional and physical recovery.

In general, it is important to promote the development of highly qualitative and sustainable touristic infrastructure, services and products that contribute to the protection of the environment and to encourage the circular use of resources. The use of sustainable modes of transport, such as the use of low-emission public transport, walking and cycling to and from tourist destinations must be promoted not only by the local municipalities, but also by private service providers.

West Sweden Tourist Board is already thinking about ways to attract visitors again to their region after the pandemic. There will most likely be a change in tourism behavior that will require other incentives for travel. A focus on sustainability will be the key to success in the future of the tourism industry. Ecological and financial sustainability are complementary. The COVID-19 pandemic has been a motor for this transition.

NECSTouR stresses the importance that mobility and safety needs to be at the core of the tourism experience as a driver for sustainable tourism. Data drivers should be at the core for success and cooperation. It is important to measure the success and sustainability at present and in the future. Resilience and cooperation with a cross-cutting and cross-sectoral approach are essential to going forward after the pandemic. The tourism sector should focus on more inclusive tourism, affordable vacations and developing rural/local regional tourism offers. Sustainability is the key.

### 4 Recommendations

This report cannot provide an overall comprehensive overview of all possible solutions to the COVID-19 pandemic in the NSC region. This kind of expectation would be unrealistic. However, based on the rich experience of the webinar speakers representing various institutions, a number of recommendations for decision makers, the representatives of the hospitality sector and cultural institutions can be drafted as a result of the webinar, as summarized in table 1.

<table>
<thead>
<tr>
<th><strong>Hospitality sector and cultural institutions</strong></th>
<th><strong>Decision makers</strong></th>
</tr>
</thead>
</table>
| Engage actively with your local community as your business may rely on it in the pandemic | Regulations:  
-introduce the regulations on restrictions in advance (at least two weeks before the lockdown) to avoid misunderstandings  
-improve cooperation across various levels of government (multilevel governance) in formulating the regulations  
-adapt the communication of restrictions to various target groups  
-use clear messages |
| Lower the dependency on foreign tourists, develop more offers for domestic tourists and local residents | Increase funding rates to balance the lack of income |
### 5 Potential ideas for future cooperation projects

Based on key findings and recommendations, the following ideas for future cooperation projects can be identified:

- **Sustainable mobility in tourist destinations**: This would include the following research aspects: examination of available modes of transport, impact on the environment and communities (noise, air pollution, damage to the landscape), raising awareness among residents, the hospitality sector and tourists for the use of bike rental and low emission public transport (e.g. hydrogen), implementation of the sustainable transport plan, application of sustainable mobility hubs (bike rental/bus/train).

- **Regional products in the tourism industry**: Promoting the awareness and the availability of regional products in accommodations, restaurants and local shops. Identification of challenges and bottlenecks, development of regional food strategies, development of business models for regional marketing, storage and delivery of regional products.

- **Rebuilding the social experience and mental recovery in museums after COVID-19**: Recognizing the power of cultural venues as places for emotional and mental recovery from the COVID-19 pandemic. Developing methods and case studies on how and what collections can have a positive effect on mental health. What kind of measures can promote social experiences, integration and inclusion among (local) people of different age groups. Strengthen the museums as a hub for the public to gather, connect and find inspiration.

- **Tourism under pandemic conditions**: How can the tourism industry prepare for the future in case of a new pandemic? What are the lessons learned and what further adaptation measures are necessary to be developed, in order to mitigate the impact on health, economy, culture and heritage, environment and the protection of resources? What is the future of tourism? Back to business as usual or towards a more sustainable and inclusive tourism?

- **Circular use of resources in tourism**: How can circular economy be better implemented in the touristic venues? How can we raise awareness among providers of tourism services and products? How can we get tourists and local communities to deal responsibly with resources used in daily life by implementing concrete initiatives: saving/reusing paper, water, plastic, picking up rubbish? Identification of bottlenecks and best practice examples.
6 Acknowledgments

We would like to thank all guest speakers for providing valuable information and sharing their experiences with the COVID-19 pandemic from the perspective of their organisations. We very much appreciate their contributions. In spite of a very tight schedule and heavy workload during the second lockdown, they were all very willing to give a presentation and contribute to this report.