

Coastal Tourism Entrepreneurship During COVID-19 in Estonia, Finland and Latvia

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Abstract: The comparative study focuses on the resilience of small tourism enterprises in coastal and marine tourism in three Baltic Sea countries - Estonia, Finland and Latvia. The research aim is to explore the response of the micro and small-scale tourism enterprises in Estonia, Finland and Latvia to COVID-19 and their development plans in the context of the pandemic. These countries share common strengths and weaknesses in tourism as well as their main tourism resources (e.g., the significance of natural resources), partially overlapping target markets. Data were collected in coastal regions in all three countries by using semi-structured interviews (Estonia N=12, Latvia N=12, Finland N= 5). Additionally, a quantitative data collection tool - a survey (N=51) was used in Finland. The content analysis generated several themes: (1) The ability of an enterprise to adapt to changes; (2) future expectations; (3) educational needs; (4) mind-set changes of entrepreneurs as a result of corona-pandemic and motivation to learn. Results suggest that more than before, coastal entrepreneurs estimate the rationality of decisions and the feasibility of investments. They report the ability to transform the design of tourism services to move towards touchless, digitized solutions as well as present an ability to produce unique service ideas under the pressure of the pandemic. Future expectations are related to the need for intensified cooperation among public and private sectors and different sectors of the economy to ensure entrepreneurial resilience and/or development. Entrepreneurs also stress their expectations regarding public (e.g. in nature areas) infrastructure development. COVID-19 pandemic has contributed to the emergence of business shrinkage strategies and vigilance toward development. The pandemic aggravated the deficit of employees and is directly linked to human resource motivation programs and the lack of resources needed to maintain that. Educational needs reveal several categories of topics entrepreneurs would like to learn about such as marketing, tourism product, and service design, management, and cooperation. The results in the three countries show a lot of similarities, the biggest differences can be seen in the various educational needs, also not in all countries the pandemic increased awareness of the role of cooperation or need to improve the quality of service when facing falling demand.

Keywords: Covid-19 pandemic, Coastal and maritime tourism, Business resilience, Skills, Tourism development, Learning needs

1. Introduction

This article focuses on the resilience of small tourism enterprises in coastal and marine tourism in three Baltic Sea Region countries Estonia, Finland and Latvia. It investigates how enterprises respond to pandemic-induced changes with a special interest in business resilience, at the micro level. Resilience is approached as a feature of an organization (cf. Ruiz-Martin *et al.*, 2018) and a crisis bringing about a fundamentally different state (cf. Dahles & Susilowati, 2015). Then, the business concept changes drastically and in unplanned and uncontrolled ways, generating new methods of operations, new business partners and network relations, new markets, different products, and finally new sources and forms of leadership employed to deal with crisis situations.

The article highlights the ability and tactics of small tourism enterprises in coastal and marine tourism in coping with the COVID-19 pandemic. As Dahles & Susilowati (2015) note, when a crisis strikes, the volatility of tourism is strongly felt among the small business owners. Furthermore, the resilience of small enterprises is essential for the resilience of the higher-order systems to which the enterprises belong (Melian-Alzola *et al.*, 2019). Individual enterprises make up a tourism destination and examining their resilience is important in moving toward a resilient destination (Usher *et al.*, 2020). Since small enterprises constitute a substantial part of the tourism industry, their capacity to withstand turbulence and bounce back from disruptions is critical for the development of the whole industry.

The COVID-19 pandemic has put tourism enterprises through rigorous strategic-resilience tests and has compelled them to rapidly adjust operations in newer and more resilient ways. Since COVID-19 is a unique challenge for tourism enterprises, they must understand the precautions that must be taken and prepare the

organization to be as resilient as possible in protecting employees and maintaining operations (Aldianto *et al.*, 2021). Thus, the importance of resilience for tourism enterprises facing crises is indisputable.

Coastal and marine tourism plays an important socio-economic role in many regions. In most coastal and marine destinations, tourism is an important part of the local economy and provides employment for the local community (Usher *et al.*, 2020). In these destinations, private sector enterprises are the key players, and the resilience of these enterprises is critical for the future of the coastal and marine tourism sector more broadly (Biggs *et al.*, 2015). Therefore, understanding the ability of small enterprises within coastal and marine tourism to cope with, and adapt to, change is paramount.

Research aim is to explore the response of the micro and small-scale tourism enterprises in Estonia, Finland and Latvia to COVID-19 and their future development plans. Estonia, Finland and Latvia are the countries of Baltic Sea region and share common strengths (safe environment, high standards of hygiene, ICT readiness etc.) and weaknesses (low price competitiveness, rather low prioritization of tourism etc.) in their tourism industries, as well as similar tourism resources (e.g., significance of natural resources in tourism and recreation), partially overlapping target markets, challenges such as seasonality, etc. Research data were collected in coastal regions in all three countries by using qualitative data collection method – semi-structured interviews in spring 2021. Additionally, a quantitative data collection tool - a survey was used in Finland.

2. Resilience of Tourism Enterprises in the Context of COVID-19

In tourism literature, many different definitions related to resilience are presented. Tyrrell and Johnston (2008) connected resilience to sustainable development and defined tourism resilience as the ability of social, economic, or ecological systems to recover from tourism-induced stress. Furthermore, Sharma *et al.* (2021) introduced the concept of inclusive resilience i.e., resilience from all sides of the value-chain transforming the tourism industry into the new global economic order for reviving the global tourism industry post-COVID-19. Hall (2017) argues the understanding and application of a resilience concept to tourism is limited, sparsely researched and it has been applied much later than in other fields. Studies have focused more on the level of general system resilience, rather than that of small enterprises (Williams *et al.*, 2020). However, scholars (Melian-Alzola *et al.*, 2020; Orchiston *et al.*, 2016; Prayag *et al.*, 2020) have recognised organisational resilience in tourism context as an emergent and important research area due to the vulnerability of tourism enterprises. It can be argued that the COVID-19 pandemic justifies increased attention to small enterprises resilience.

Frequently used definition of business resilience in tourism research is that by Fiksel (2006, p. 16): “Business resilience is the capacity for an enterprise to survive, adapt, and grow in the face of turbulent change”. In tourism, it is presented as an organisation’s ability to cope with unexpected change and adapt to unprecedented threats to the business environment (Biggs *et al.*, 2012). In small tourism enterprises, perceived resilience is the extent to which business owners feel that their business will be able to maintain or grow its existing level of employment and income and stay operating in the face of crises and change (Biggs, 2011). Thus, resilience can be seen as a crisis management tool/strategy for a tourism enterprise stability and adaptability to all types of risks (Sharma *et al.*, 2021).

Dahles and Susilowati (2015) suggested that tourism enterprises can show resilience in three different ways: survival, adaptation, and innovation. According to them, the majority of the enterprises adapt to the crisis adjusting their operations, management, and marketing strategies to sustain themselves under dramatically changing conditions. Orchiston *et al.* (2016) and Prayag *et al.* (2020) argued that resilience in tourism enterprises has two dimensions – planned (pre-disaster) and adaptive (post-disaster). The nature of small tourism enterprises requires constant adaptation and a forward-looking culture, where preparing for and responding to emergent issues is a core business (Orchiston *et al.*, 2016). In addition, planned resilience has a significant and positive influence on adaptive resilience (Prayag *et al.*, 2020). In turn, adaptive resilience has a significant influence on business performance (Chowhury *et al.*, 2018). In addition, psychological resilience contributes to organisational resilience if employee resilience investments are made in smaller tourism enterprises (Prayag *et al.*, 2020).

Due to the small tourism enterprises` key role in marine and coastal tourism, understanding resilience is highly relevant (Biggs *et al.*, 2015; Williams *et al.*, 2020). According to Biggs (2011) and Biggs *et al.* (2015), lifestyle-driven entrepreneurship is positively related to business resilience as well as human capital i.e., the capacity to be flexible and adaptive is a vital component of business resilience. Williams (2020) claimed that for small enterprise owners on coastal and marine destinations, it is essential to being able to anticipate the disruptions that may impact the enterprise`s operational strategy. Therefore, a scenario planning approach could be taken

alongside initial business planning. However, Usher *et al.* (2020) argued that many small tourism enterprises are lacking in formal planning as they are more concerned with day-to-day operations.

The COVID-19 pandemic has been accompanied by an unprecedented health crisis with significant economic implications in many sectors around the world but especially in tourism. The most tourism entrepreneurs and destinations report the drastic decrease of tourists, reduced international travel and changes in consumption behaviour. For decades tourism has been an important source of export revenue for many countries, accounting for about 10% of global GDP, but in 2020, the figures changed drastically, leaving the tourism sector as a share of global GDP of only 5.5% (WTTC, 2020). Travel restriction has changed travel trends and travellers' behaviour, travel demand has shifted from international to domestic destinations, where travellers were able to travel for short distances and use travel services considering social distancing (Sohn *et al.*, 2021). Pandemics decreased consumers' income and effected quality of life, issues with information, led to inability to understand, plan, and cope with the health, economic, informational, environmental, and social threats in turn shifting consumers' marketplace and socio-cultural behaviour (Campbell *et al.*, 2020).

A range of other industries and occupations beyond the tourism sector are also affected by COVID-19 prevention measures, causing unemployment and reducing household income throughout the entire value chain (Pham *et al.*, 2021). Often the population dependent on only tourism was forced to find new occupations (Rajalingam, 2021). The situation was better if tourism was not the enterprise's single source of income but used as an opportunity when the sector was blooming, changing from side-businesses to core business and back again, playing an any important in diversifying livelihoods and diminishing dependence on one single source of income (Dahles & Susilowati, 2015).

In a peculiar way, COVID-19 with its social, economic, health and economic consequences, and the constraints caused by pandemic, gave an ideal opportunity to reshape management plans, especially for environments such as beaches and their associated marine resources (Pearson *et al.*, 2020). Dahles and Susilowati (2015) found that entrepreneurship is becoming more active in the business environment affected by the crisis and in long-term crisis businesses find innovative ways to survive and create infection prevention programs (Rodríguez-Antón & Alonso-Almeida, 2021: 12–13).

Travel contracts that were previously made months in advance have been decreased due to the high risk of cancellation from customers and tourists delaying their purchase decision until the last moment (Toubes *et al.*, 2021). Because of the pandemic, people travel to less densely populated destinations, preferring to drive their own cars and have day trips requiring no accommodation. The longer the consumers engage in threat-induced behaviours, the more likely it becomes a habit after the pandemic. In addition to avoiding popular places, people also buy take-away food instead of dining in a restaurant and prefer staying with friends or relatives instead of official accommodation providers. (Sohn *et al.*, 2021) World Travel and Tourism Council report (WTTC, 2020) brings out four connected trends: (1) travellers preferring familiar and predictable, therefore short-term domestic holiday outdoors, using trusted providers; (2) health and hygiene are high priority, businesses need to collaborate with their extended value chain to be ready in case of demand; (3) consumers are expecting contactless technologies; (4) awareness about wildlife markets and poaching has raised wildlife protection movements, that will also help to solve social, institutional and environmental problems.

Toubes *et al.* (2021) recommend for tourism companies and destinations to offer tourists a good internet connection throughout the customer journey since it offers an opportunity to obtain prior information about the tourist's interests and adapt their offer, provide real-time information during the stay and use eWom opportunities to make visitors share their experience. For companies wishing to market in the field of "new tourism" it is important to understand that B2B channels will lose importance and be replaced with direct sales from B2C and that it is essential to implement personalisation, digitalisation, means of security, use online channels, new technologies and redesign products and strategies.

In order to tourism destinations, operators and entrepreneurs to survive, the sector must be reconceptualized and restructured towards sustainable and resilient tourism model, where quality is increased, over-tourism avoided (Vărzaru *et al.*, 2021). Rodríguez-Antón and Alonso-Almeida (2021) agree that collaboration is very important and "new normal" should be adapted and communicated but also suggest focusing on supporting domestic tourism. According to Toubes *et al.* (2021:1347) tourism offer needs to be restarted, reformed, and reinvented, where technological solutions are used to control health and safety matters; booking forecasts update automatically; business operations, like revenue management and pricing systems, function based on digital and data analysis. Toubes *et al.* (2021) predict big changes in security (offering safety and trust in destination and communicating it, real-time care), engagement (showing accurately segmented tourists' emotions and feelings

during the stay in destination) and personalization (direct contact in communication with greater interaction and closeness).

3. Methods

The semi-structured interviews as the main data collection method were chosen to learn about the in-depth experience of tourism professionals in different organizations related to coastal tourism in Estonia, Finland, and Latvia. They took place in the spring of 2021. The informants were selected to represent all three sectors – private, non-governmental, and state / municipal. Some informants represented more than one sector as they had their own business and were active membership in tourism-related NGO. The sample of informants in each country included: (1) micro, small and medium-sized enterprises located in coastal areas; (2) municipal and state institutions responsible for the recreation and tourism development in the specific coastal area; (3) NGOs related to tourism development in coastal areas. The enterprises represented a wide spectrum of tourism business activity: different types of accommodations, including camping sites and SPA hotels; different inland water and sea water-related active tourism products, tours, transportation services and cruises, restaurants, heritage sites, seminar services, theme parks, etc. Many of the informants represented organizations that offer different tourism products in coastal territories. For some enterprises tourism and recreation are a side business while for the majority – the main source of income. The private enterprises were represented by their owners or managers. NGOs and state / municipal sectors were represented by the managerial and senior-level informants responsible for tourism networking and development, and destination management of the coastal areas. The sample also included organizations responsible for the nature protection in such destinations as sea resorts, islands, and protected coastal areas. The Finnish sample included participants from the Satakunta region, while Latvian and Estonian samples offered geographically wider representation. The total number of informants is N=25 (Estonia N=12, Latvia N=12, Finland N= 5). Additionally, the survey of SME was conducted in Satakunta region about the impacts of the corona pandemic during summer 2020, and September 2020 (N= 51). Respondents represented various tourism-related sectors such as restaurants, accommodation businesses, transportation, and events.

The length of interviews lasted up to one hour. The participants were interviewed both by videoconference calls, phone, and face-to-face. Interviews included several blocks of questions: specifics of coastal and water-based tourism business, impacts of the Covid-19 crisis; ability to adapt to the changes; learning needs.

The thematic analysis was used to analyse the transcripts of interview and data suggested several themes: (1) direct Covid-19 impacts and transformation of consumers behaviour because of corona pandemic; (2) ability of organization/destination to adapt to changes and limitations to develop; (3) future expectations and plans, suggested structural changes; (4) mind-set changes of entrepreneurs as result as corona-pandemic and motivation to learn.

4. The Results

Direct Covid-19 impacts and transformation of consumer behaviour as a result of the COVID-19 pandemic. Informants refer to the wide spectrum of direct and indirect pandemic-induced impacts. Tourism enterprises with a focus on domestic tourism have experienced stable or even increased demand. Nature tourism and outdoor recreation demand have grown to the levels where the carrying capacity of the relevant tourism sites, and routes have been at some risk. In Finland, nature tourism demand increased in more remote, sparsely populated areas, Meanwhile, in Latvia and Estonia, the most popular natural sites were over-used. In the accommodation sector camping sites, vacation cottages, and rural tourism accommodation establishments comfortable for one household were fully booked even during wintertime, especially during weekends and vacations. Simultaneously some SPA centres and bigger hotels entered hibernation to reduce the operations with loss.

New sub-segments of the domestic tourists have emerged in the case of Latvia and Estonia (e.g., Russian speaking population from Tallinn, families who previously spent their holidays abroad). Local destinations previously unfamiliar for visitors have become exotic and trendy. There has been a significant decrease of demand from foreign markets and business tourists due to travel restrictions and epidemiological safety regulations. However, this trend affected mostly bigger destinations and coastal resorts. In the case of Latvia - small peripheral tourism businesses had been more resilient to other systemic challenges. In all countries individual visitors (or one household) to some extent had replaced groups (corporate clients, school groups, event visitors) and consequently has further impacted marketing and sales activities.

"Since the business travellers are missing, this has pushed me to invest more in marketing activities and change the marketing and sales channels." (FIN)

Some informants report the length of the visit has decreased and it has requested the changes of human resource allocation and management. Significant loses of human resources have been reported by entrepreneurs, specifically in Latvia and Estonia.

"We will not have people after the crises is over." (EE)

The informants have not observed significant changes in visitor motivation. Mainly some organizational aspects of travel have transformed, such as increased demand for individual services (e.g. kayak rental), also events, and pre-prepared programs that could be experienced individually or within one household, outdoor services.



Figure 1: The Direct and Indirect Impacts of COV-19 to Enterprises

The ability of organization/destination to adapt to changes and limitations to develop. The ability of organizations to adapt to changes has been analysed both at the product and organization level. In the case of Estonia, informants have emphasized that the product itself has not experienced significant transformations, however, some new extensions have been developed (or were at least considered).

"Small islands have the potential for rapid development, they should also review their services. Organizing big festivals and crowded mass festivals should not be their focus." (EE)

Latvian tourism entrepreneurs refer to some transformations in service design - more touchless services or digitised solutions. They also state unique, innovative product ideas were implemented (seasonal products, pop-up products). In the context of responding to changes, a common challenge has been previously mentioned drain of skilled employees from business and industry in general. Focus from the group tourism and business segments to individual visitors, to local visitors has raised previously non-identified challenges. More than before, entrepreneurs stress the significance of rationality of decisions, the feasibility of investments.

Future expectations and plans, structural changes. Future expectations spotlight long-term problems within and around the tourism industry in all three countries. One of the top future expectations is enhanced cooperation among: (1) public and private sectors; (2) businesses across different tourism sectors in terms of cooperation, entrepreneurs emphasize the role of consultancy, for example, to prepare project proposals. Product-related expectations include continuous development of public outdoor infrastructure at the destination level, maintenance of high-level service quality. Most informants had been rather realistic instead of showing groundless optimism about going back to the pre-pandemic numbers.

Mind-set changes of entrepreneurs and other tourism professionals because of corona-pandemic and their motivation to learn. Consideration of shrinkage strategies for business and vigilance towards development is one way how the mind-set changes of entrepreneurs are presented. Another mind-set change is related to the deficit of employees and transformed perception of human resource motivation systems and programs on one hand and the lack of resources for motivation support on other. To some extent, these impacts have triggered “encapsulation” or focus on the micro-level business related challenges in Latvia, which leads to reduced motivation to cooperate, especially with public sector organisations.

“Entrepreneurs prefer to work alone, first comes the company, then the destination.” (LV)

Educational needs. Despite some rather depressing aspects, entrepreneurs emphasize the restructuring of their private time to learn more about various aspects of business. The analysis reveals four main themes entrepreneurs would like to learn about - marketing, product and service design, management, cooperation. The main educational interests are focused to the marketing, specifically digital marketing, social media marketing. Some informants report only some basic digital marketing knowledge. Informants need in-depth knowledge of the specific aspects of product and service design, such as safety. Latvian informants also report increasing interest into earning some quality labels, however, service quality related matters are topical only for Latvian and Estonian entrepreneurs. The informants have expressed their will to extend knowledge about specific management aspects such as business resilience, adaption to pandemic restrictions, sustainability, new business models and other fields that are directly linked to pandemic impacts or indirectly accentuated by them. In Latvian case, entrepreneurs have not expressed interest to increase their ability to cooperate at all.

“There are three groups of entrepreneurs: active ones, react if they are remained and the numb ones” (LV DMO)

Not all business owners understand the significance of cooperation and networking in tourism, and it also leads to informants not being able to identify the areas where improvements are needed.

5. Conclusive Discussion

According to Dahles and Susilowati (2015) tourism businesses show resilience in three different ways: survival, adaptation, and innovation. The study results confirm organizations in Estonia, Finland and Latvia have adjusted their operations, management, and marketing strategies. Referring to the resilience dimensions suggested by Orchiston *et al.* (2016), the entrepreneurs and DMO have not been prepared for the crisis as most of the responses to crisis have been adaptive (post-disaster) rather than planned. In Latvia, this adoptive response is also clearly manifested by emphasizing the role of support from the public sector, including waiting for investments in infrastructure. Research participants discuss more local-level responses to the crisis, as crucial national-level support was not received at the time of the interviews, which also might indicate to slow national system of decision making and processing support. Instead, municipalities have been able to deliver small scale support activities (campaigns, games etc.) for tourism businesses and destinations despite their limited financial capacity.

Results of our study confirms that quite a few entrepreneurs have considered Covid-19 pandemic as an opportunity to reshape management plans (Pearson *et al.*, 2020) and also to invest time into learning getting new knowledge that could support future development, to work on achieving new quality and eco labels. The study confirms that some businesses did not pay attention to the quality of the service and the implementation of additional offers before pandemic when demand for their product was high. When the demand falls, then they direct their attention to what else could be offered to extend the visitors' stay and improve their satisfaction. If in some organizations reshape of management was initiated by the decrease in the number of visitors, then in other places due to the pandemic, the flow of travellers shifted to natural areas and some entrepreneurs welcomed unexpected high numbers of visitors and that created the basis for making new development plans.

Värzaru *et al.* (2021) states tourism industry needs to work together creating a plan how to manage in the crisis; however, perspectives of tourism entrepreneurs to cooperation are rather different in three countries. Despite collaboration is very important and should be considered “new normal” (Rodríguez-Antón and Alonso-Almeida, 2021), Latvian organizations do not recognize the value of cooperation during at the extent as their Estonian and Finnish counterparts. In some cases, crises generated polarized views – increased cooperation versus increased focus on own business.

For tourism destinations, operators and entrepreneurs to survive, the sector must be restructured towards sustainable and resilient tourism model, where quality is increased, over-tourism avoided (Värzaru *et al.*, 2021) and shift towards more sustainable destination development is clearly manifested in case of few Estonian participants. Biggs (2011) stresses the capacity to be flexible and adaptive is a vital component of business resilience and our study confirmed that under the tension of pandemic entrepreneurs have come up with creative solutions to adapt their services to fast changing situation induced by social distancing – for example, to enhance accessibility of tangible heritage, they introduced temporary outdoor expositions, mobile games, digital tours and expositions, organized pop-up events, home delivery solutions, etc.

During the pandemic, people travelled to less densely populated destinations and used travel services considering social distancing (Sohn *et al.*, 2021). Undoubtedly, pandemic directed flows of visitors towards the nature-based recreation sites in all three countries; however, in Latvian case many people found themselves in popular and over-crowded nature sites with restricted ability to have social distance. This also highlighted the issue of not having enough nature-based recreation areas around urban centres.

COVID-19 pandemic has continuously been creating diverse impacts on any sphere of life globally, and our research areas have not been the exception. Besides primary impacts induced by legal measures, secondary impacts should be considered, such as “domino effect” in regards of changes of some industry or changes of the values, attitudes, mindset, and behaviour of various groups of society. It is important to emphasize that the effects of pandemic situation represent both – positive and negative.

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