

# WE WILL SURVIVE THE CORONAVIRUS CRISIS TOGETHER



**DESTINATION KVARKEN**

Two countries, a world of contrasts



EUROPEISKA UNIONEN

**Interreg**  
Botnia-Atlantica

Europeiska regionala utvecklingsfonden





# WE WILL SURVIVE THE CORONAVIRUS CRISIS TOGETHER

**Work Package 2: Research & Development | Activity: Research**  
**Final Version as of June 2020**

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## Abbreviations

BA	Botnia-Atlantica Programme
DMO	Destination Management Organisation
TEM	Ministry of of Economic Affairs and Employment of Finland

## Appendix

Questionnaire

# 1. Background

The Destination Kvarken project, which aims to increase the number of visitors to the area, includes, in geographic terms, three provinces in Ostrobothnia Finland, the region of Umeå and High Coast in Sweden and the following seven tourist-destination organisations: High Coast Destination Development; Visit Umeå; Visit Vaasa; Visit Seinäjoki Region; Visit Kokkola; Visit Pietarsaari-Jakobstad; and Visit Kristinestad.

The project's principal activities include networking and cooperation, R&D, digitalisation, market activities and product development. Hanken is responsible for two work packages: WP1 Research and Development and WP2 Digitalisation.

At the time of this writing (May 2020), it can be concluded that the COVID-19 (coronavirus) pandemic has exerted a devastating effect on the global economy, hitting the tourism sector particularly hard. According to a survey conducted by Visit Finland during the 21-27 March 2020, 96% of tourism companies in Finland (498 respondents) had experienced a wave of cancellations due to pandemic (Visit Finland 2020). As a research university, Hanken has followed developments very closely and has tried to counteract the negative effects from the crisis by bringing in expert knowledge of different types and modes to the project's areas and actors.

The BA project is not allowed to provide direct financial support to companies, but we try to do our best to channel our support through methods, such as providing education and development support. Generally, projects exist to develop and change things. In addition, a project must be alerted to changes in planned activities when something sudden 'happens'. In our case, that something sudden was COVID-19, which affected everyone working in tourism development in Kvarken and forced the entire tourism sector to close down in the Kvarken area and worldwide.

Research, education, information and knowledge bring competitiveness and readiness to tourism companies. During the COVID-19 outbreak, Hanken surveyed tourism companies involved in the Destination Kvarken project, with the aim of studying how entrepreneurs, company managers and personnel are reacting to the coronavirus crisis, as well as gauging their outlook for the future after the pandemic. Kvarken's destination and development organisations are interested in how companies in the region are coping with the crisis; therefore, we also asked tourism companies what kind of help they might need from destination organisations during this challenging time.



## 2. Method

This study's method combines a quantitative research approach with questions of a qualitative nature (Appendix, questionnaire) because we were more interested in tourism companies' feelings, actions and plans than in gathering statistical data. The study employs a semi-structured survey and is explorative. Moreover, the target group's size was quite small, as we limited our target population to those involved in the project who are located on the Finnish side of Kvarken.

Initially, the purpose was to survey all companies involved in the Destination Kvarken project on both sides of Kvarken, including companies in Sweden, but due to many other similar surveys that other organisations in Sweden conducted, we were advised to focus on companies in Finland. Altogether, this survey's target group comprised 22 tourism companies.

The survey was conducted using the Webropol Survey tool. The survey was sent via personal emails to 22 tourism companies and attractions during the 1-8 April 2020. A reminder was emailed a few days later to those who had not responded. The survey offered the option of responding in Finnish or Swedish.

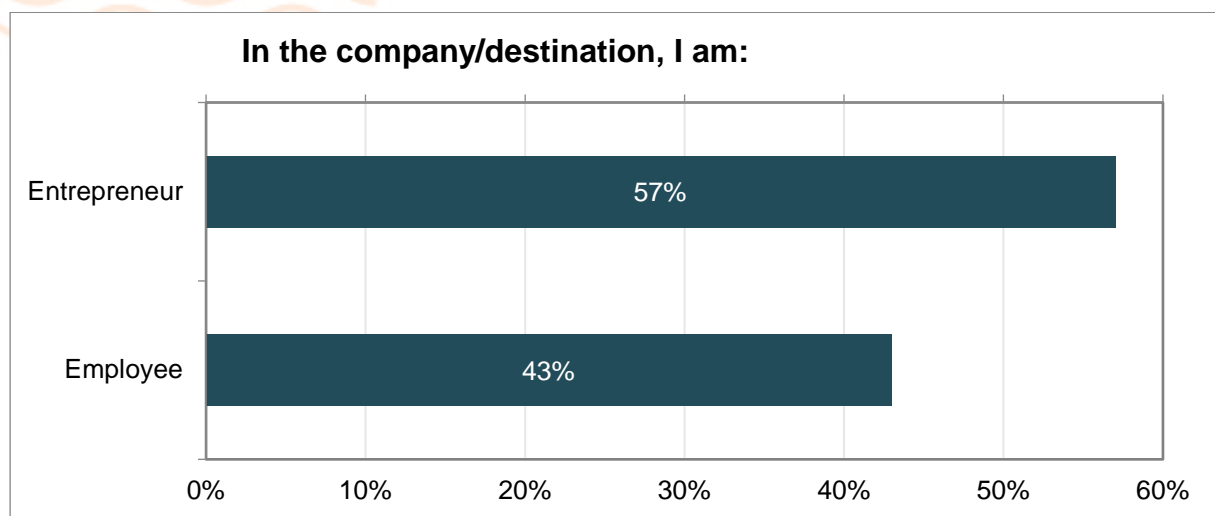
In addition to the results from our study, this report also utilises findings from corresponding studies that other tourism organisations carried out in the Kvarken region. We attended webinars on the pandemic's impact on the tourism business to gather information about what is happening nationally and internationally. Additional Interviews were conducted with local tourism actors to deepen our knowledge of the general situation among entrepreneurs in the area.

### 3. Results

#### 3.1. Tourism companies' profile

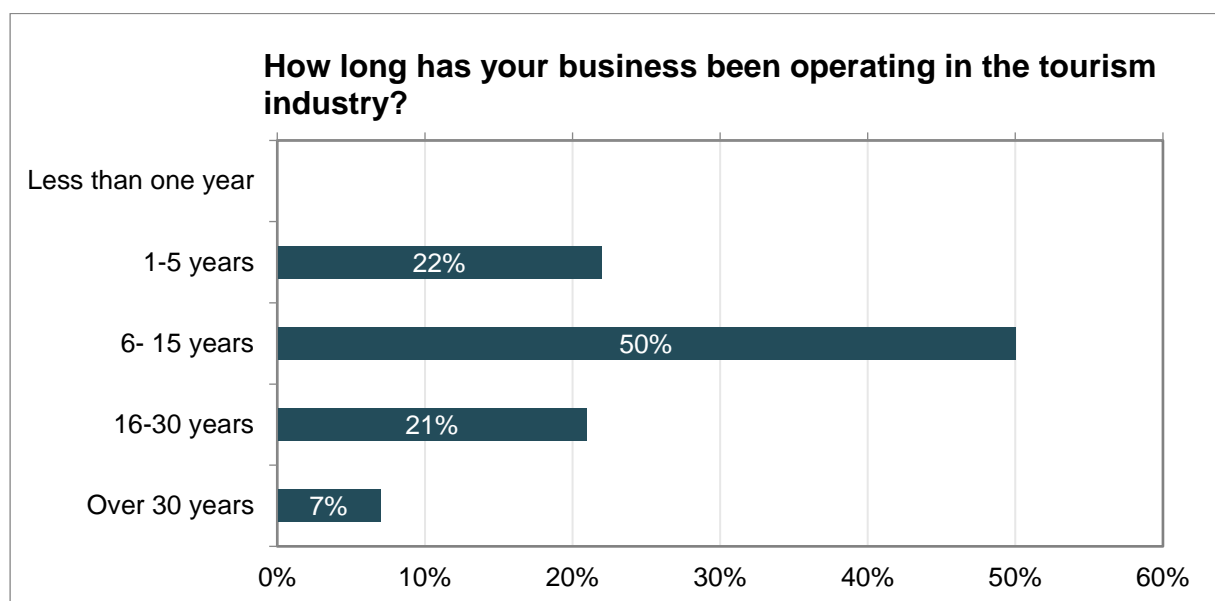
Altogether, 14 tourism companies responded to the survey, a response rate of 64%. Among the respondents, eight indicated that they are entrepreneurs (57%), and six are employees at companies (43%) (Table 1).

Table 1. Position in the company



Half (50%) of the companies have been in the industry for 6-15 years; 22%, 1-5 years; 21%, 16-30 years; and 7%, over 30 years (Table 2).

Table 2. How long has your business been operating in the tourism industry?



The companies offer quite a wide range of different types of tourism products and services. In fact, several companies offer a combination of different services, e.g., hotel accommodations and restaurant services. Other types of tourism services mentioned included a café, a distillery's visitor centre and fishing guides (Table 3).

Table 3. What products and services does your company offer?

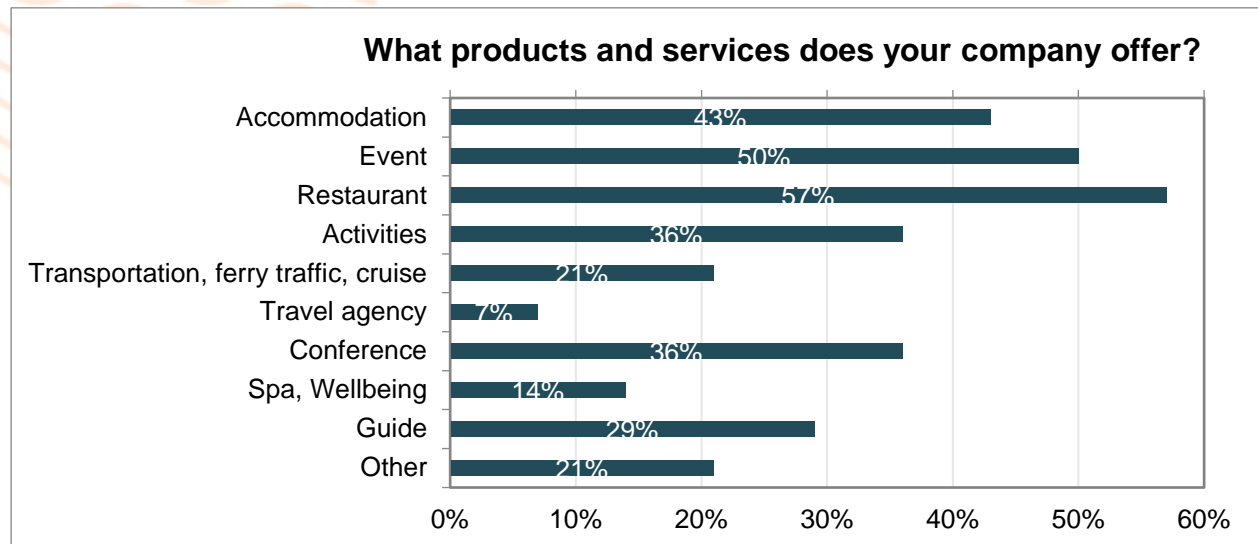
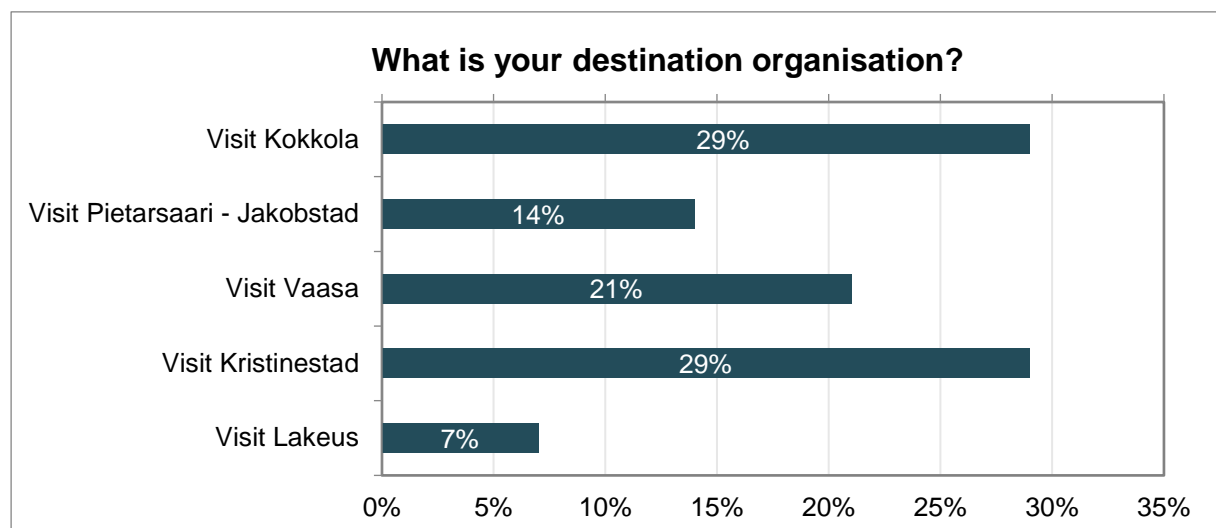


Table 4 shows that companies in the survey belong to different destination organisations in the Kvarken region. Four companies belong to Visit Kokkola, two to Visit Pietarsaari-Jakobstad, three to Visit Vaasa, four to Visit Kristinestad and one to Visit Lakeus (also known as Visit Seinäjoki region).

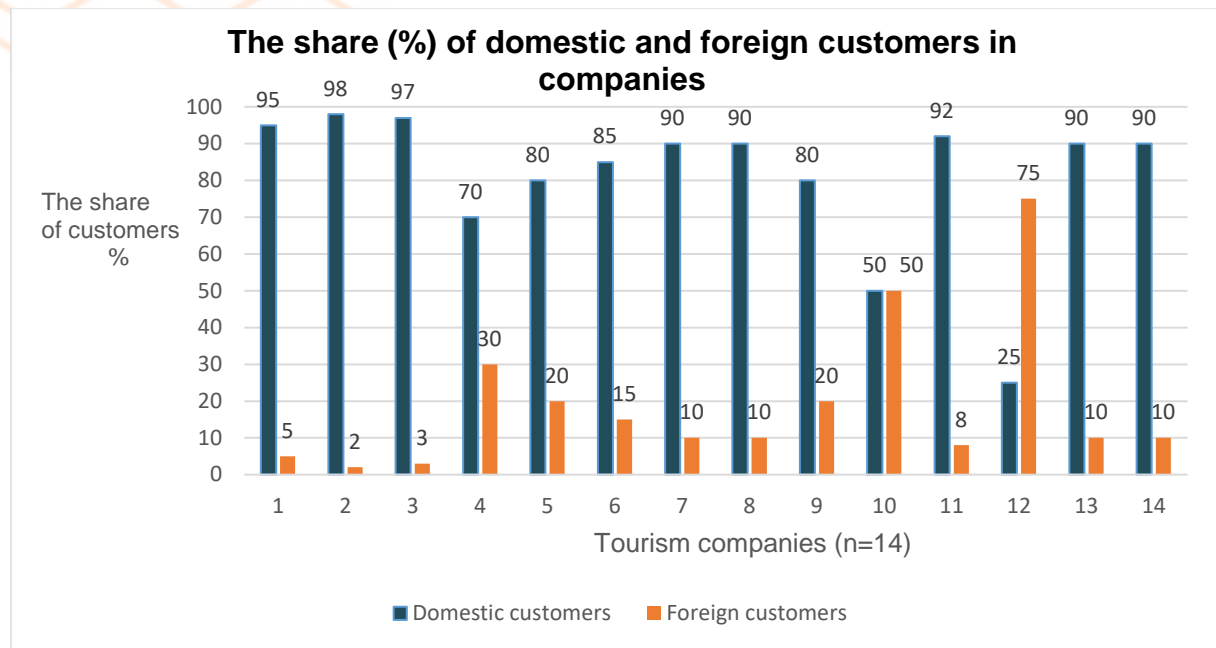
Table 4. What is your destination organisation?



## Customer segments

The companies were asked to estimate the percentages of their customers who are domestic and international. On average, the breakdown was roughly 81% domestic and 19% international, but a more fine-grained, company-by-company analysis indicated a very mixed combination of Finnish and international customers. The share of domestic customers in companies ranges from 25% to 98%, and the share of foreign customers ranges between 2% and 75%.

Table 5. The share (%) of domestic and foreign customers in our study's companies



	Minimum value	Maximum value	Average	Median	Standard deviation
Domestic customers (%)	25.00	98.00	80.86	90.00	20.42
Foreign customers (%)	2.00	75.00	19.14	10.00	20.42

According to the results, customers come to Kvarken from all around the world, including Nordic countries, the United States and countries from Europe and Asia. Some countries mentioned often were Sweden, Germany, Netherlands, United Kingdom, Estonia, Norway, Spain, Italy, France, Belgium, Denmark, Switzerland and Australia.

### 3.2. How tourism companies face the coronavirus pandemic

**Consider the prevailing coronavirus situation from a personal perspective: What issues are you most concerned about regarding the coronavirus pandemic? (Mention three.)**

Health and economic livelihood were the concerns cited most often from a personal perspective. Quite expectedly, people working at tourism companies were worried about their own health, as well as the health of those close to them. In addition to health considerations, people clearly were concerned about economic matters, including their own workplaces. From an entrepreneurial perspective, respondents were concerned about the future of their companies. The responses revealed people being frustrated by not knowing how long this coronavirus crisis will



last. In addition, people wondered how the world may change after the pandemic. One respondent described his thoughts by asking what the 'new normal' would be like after the immediate crisis.

Entrepreneurs and employees at the tourism companies seem to be very anxious about the situation in general. Personal economic worries and the threat of bankruptcy are on people's minds. Mental well-being could be put to the test soon, and what also bothers many is the duration of this extraordinary situation. The general attitude was that they will get through it if the crisis does not continue for too long.

The respondents were asked to name three concerns regarding the coronavirus pandemic from a personal perspective. Thirteen sets of responses are provided because one did not respond. Open answers are listed in Table 6.

*Table 6. Personal concerns due to coronavirus*

Personal Perspective		
1	2	3
Risk of infection	Becoming unemployed	The economy
Livelihood	Falling ill	How will China manage the next pandemic?
Family members' health	Personal health	The economy
Pandemic's duration	What is the 'new normal' after the immediate crisis?	Loved ones' health
Uncertainty about the pandemic's duration	Personal and loved ones' health	The next global economic crisis
Personal and loved ones' health	The situation's unpredictability/not knowing the duration	Getting the right information
Losing customers	When customers return	How things have changed from before the pandemic
Continuing layoffs	Instability in the restaurant sector	Appreciation of the profession in society
Personal and loved ones' health	Possible layoffs or dismissal threats	Movement restrictions
Loved ones' health	Non-wage income	Bankruptcy
That the pandemic will last a long time	Becoming infected and being quarantined	The pandemic's (economic) worldwide effect overall
Personal and loved ones' health	Financial difficulties	Not knowing pandemic's duration; mental well-being under stress
Cash flow	Support opportunities	Timetables

**Consider the prevailing coronavirus situation from a corporate (company) perspective. What issues are you most concerned about regarding the coronavirus pandemic?**

Stagnant cash flows and companies' future existence concern employees at tourism companies. From a company perspective, respondents are concerned about their companies' ability to pay the bills and cope with the crisis overall. They also are concerned about losing customers and shrinking cash flow. The upcoming summer without customers was an issue of particular concern. Cash flows have stagnated, so tourism companies' futures are in danger. The planning is also difficult, as one respondent put it: 'You worry when you don't know the duration of an epidemic. Unable to plan events and (you) cannot make plans'. One respondent was concerned about how China would manage the next pandemic, and is there more to come?

The staff plays a crucial role in the tourism and hospitality industry, so entrepreneurs were worried about how to deal with employees during the pandemic. Staff health and safety issues during this COVID-19 situation are also a topic of concern. Another aspect mentioned was that the companies might face employee shortages after the crisis, particularly if they have been forced to lay people off. Furthermore, the respondents also were concerned about how current employees can remain flexible and maintain their motivation.

Expected changes in customer behaviour also are a big concern. Entrepreneurs already are considering how the coronavirus will affect customer behaviour in the future. For instance, will customers continue to hold online meetings, rather than book conference rooms as they once did? They are wondering whether and to what extent the corporate-customer segment will shrink, arguing that companies probably are no longer spending money on service industries like they did before the crisis. Corporate groups may not travel to and gather at public facilities like they did before, and if groups do keep coming, will they be smaller? A few companies were concerned about whether or not people have the money to travel in the future. Thirteen sets of responses are provided because one did not respond (Table 7).

*Table 7. Company concerns due to coronavirus*

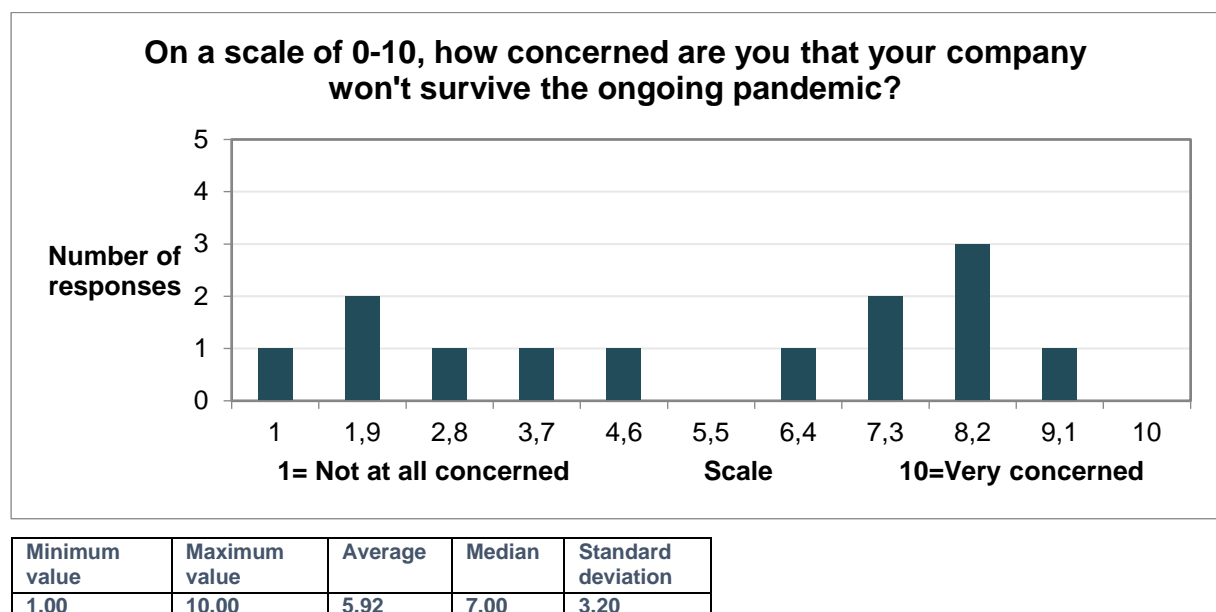
<b>The Company Perspective</b>		
<b>1</b>	<b>2</b>	<b>3</b>
Reduced clientele	Economy	How will China manage the next pandemic?
Staff safety	Corporate cash flow	Customer flow after the pandemic
Staff health	Customer flow during the pandemic	Staff flexibility and motivation during the state of emergency
Missing cash flow	Uncertainty over the state of emergency's duration	Cash flow discharge
Uncertainty about the emergency's duration	What kind of tourism world awaits after the crisis?	Corporate economic situation
Duration of situation difficult to foresee	Customer spending behaviour in the future	How long will the whole disease last?
How to pay debts	Do customers have money to come?	Possible worker shortages after the crisis
Long-lasting effects from the pandemic on company operations	Economic worries	Uncertainty about events when planning for the future

The continuation of remote meetings in the future	Businesses spending less money on the service sector	Fewer or no corporate groups and/or smaller groups
Payment difficulties and bankruptcy	Business customers decline	Economy
That people dare not come to our company, even though it is perhaps one of the safest places to stay at right now!	That it takes time to get started again	How will our business turn out if there are no customers during the summer?
The monetary situation is weak	All orders were cancelled from the spring, and new orders have not come	Timetables
Cash flow	Support opportunities	Corporate ability

#### On a scale of 0-10, how concerned are you that your company won't survive the ongoing pandemic?

Study participants were asked to rate how concerned they are about their companies' survival through the ongoing pandemic. On average, respondents' concerns lied in the middle of the scale, around 5.9 on a scale ranging from 1 = Not at all concerned to 10 = Very concerned. Our research suggests that some companies are very concerned about their survival through the crisis, while others are not too concerned.

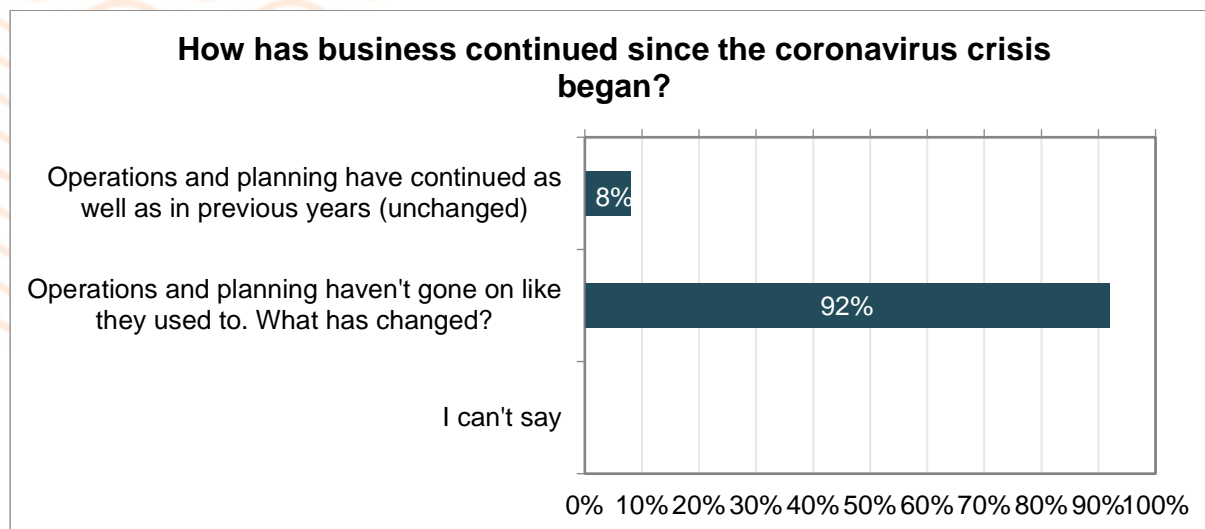
Table 8. Survival concern



#### How has business continued since the coronavirus crisis began? (Q11)

According to 12 respondents (92%), business has not continued as usual. Only 1 out of 13 (n=13, one did not respond) reported no change in business climate. Based on the survey, all bookings for the spring and summer were cancelled. In parts of businesses, staff had been laid off for a few months at the time of the survey. The start of the season has been moved back, and the expectation is that it will be moved back even further (Table 9).

Table 9. Companies affected by coronavirus



Operations and planning have not gone on like they used to, and on the question of what has changed, different types of answers were mentioned:

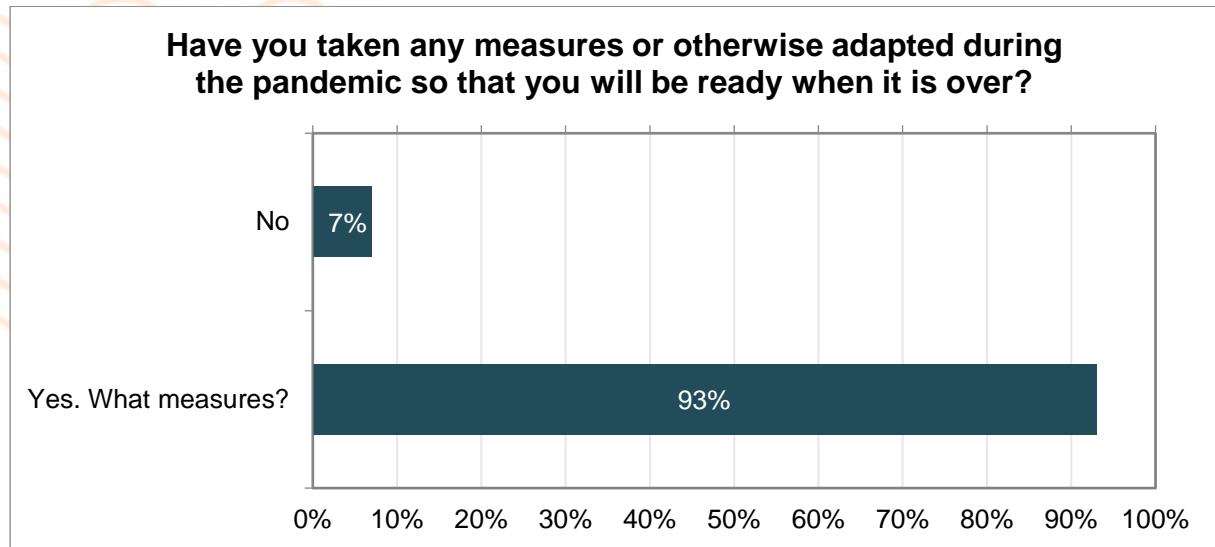
- Take-away has increased.
- All bookings in the next few weeks have been cancelled, although summer normally is booked.
- We only do take-away portions.
- Early summer activity already has been cancelled, and as of July, activity remains completely unclear.
- Planning has changed. The summer season normally starts 1 May, but already has moved to midsummer, and more changes are possible later.
- Early spring and early summer bookings have been cancelled.
- Employees have been transferred to the parent company to manufacture hand disinfectant.
- Staff have been laid off for two months, and I have been partly laid off + distant work.
- All staff have been laid off or partially laid off; all bookings until 15 June have been cancelled.
- We're thinking about some new concepts: smaller courses and retreats; more overnight guests; and new activities to offer them.
- All orders have been cancelled, and new orders have not come.
- The whole order book was emptied in a few days.

**Have you taken any measures or otherwise adapted during the pandemic so that you will be ready when it is over? (Q16)**

Tourism companies have remained active during the pandemic. According to the survey, companies have decided to take advantage of the coronavirus period by investing time in different development activity. 93% of companies report that they remain active to be better-prepared when the crisis is over. Development work has been done, such as developing webpages and booking systems. Some of the companies said that they are working on web store development. New product and service development also is planned. It seems that some companies are focussing on marketing and sales development, and some respondents mentioned having applied for business subsidies (Table 10).



Table 10. Actions during coronavirus



The respondents said that they have remained active during the crisis in these ways:

- Looking for new products
- You can create digital content readily.
- Marketing preparation
- Revamping online store and homepage (started even before pandemic)
- Renewal of online shopping
- Revamping reservation system and website
- I bought a business room.
- We have sought funding from Business Finland to develop a virtual distillery round. This measure would mainly occur during a time when the pandemic still exists.
- Marketing and focussing on sales
- Development of restaurant activities, development of digital marketing, development of experience services, etc.
- Working on other things right now, which makes time limited, but yes, I can work with upcoming marketing, new services, etc., although this is now done by community labour.
- Looking for development support
- Focussing on the right client group

### 3.3. Tourism companies' post-coronavirus planning

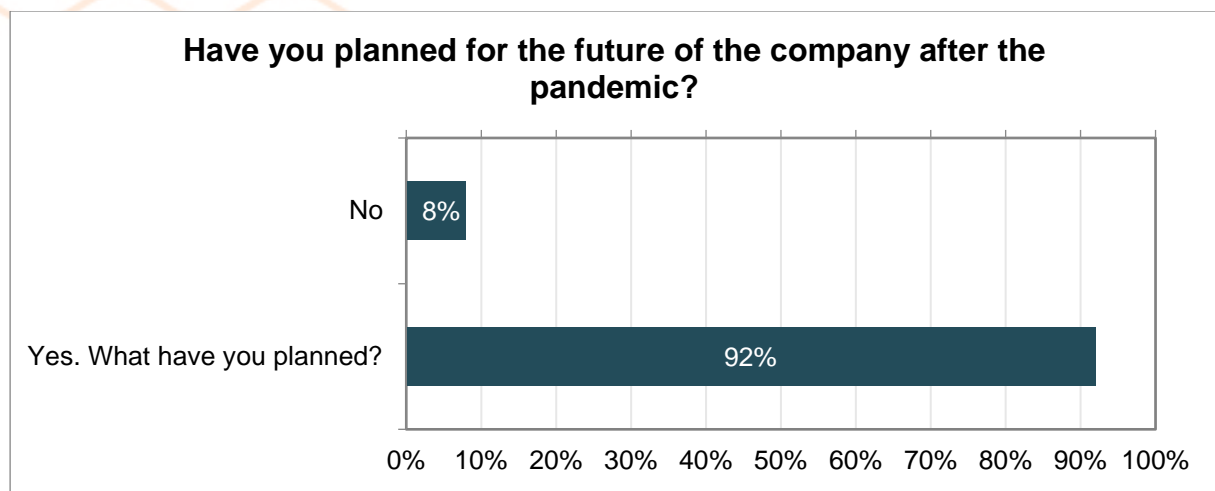
#### Have you planned for your company's future after the pandemic? (Q12)

There will be a 'post-coronavirus' period (when it begins and ends, however, remains hard to tell). From a business perspective, it is of utmost importance that business owners, entrepreneurs and managers think about and plan for the future. Almost all respondents have a positive attitude and plan for the future (92%) (Table 11), which includes activities such as:

- Developing the company
- Increasing occupancy rate and easing the balance sheet
- What's planned is perhaps the wrong approach; in terms of summer, we've been thinking about different scenarios.

- By the year 2021, interest in the region presumably will grow.
- Development
- Efforts have been made to restore operations as quickly as possible and continue to develop operations.
- Fall events and marketing
- We plan and evaluate our operations on a daily basis, and we look toward the future.
- More focussed on individual than on group activities
- We hope our operations could continue after the pandemic as actively as possible and attract customers
- Local/regional tourism

Table 11. Planning for the future




**If you're thinking about the post-coronavirus climate:**

**What do you think will change in your company's operations? (Q13)**

It's still difficult for entrepreneurs to predict what will change at their companies after the pandemic. Some hope nothing will change, while other respondents believe everything will change after the coronavirus. Pandemic-induced changes in operations might be a good thing for companies, such as potential collaborations with other companies, and decreasing numbers of customers will challenge companies to expand their offerings and provide new types of services. One respondent stresses the need for more flexibility in the future: 'The flexibility needs to increase. Binding agreements with suppliers and staff alike must be avoided. Now the cost savings to be made remain permanent. Digitality is important so marketing, as well as working methods, must continue to grow'.

Here's how respondents answered:

- Hopefully nothing
- Hardly anything substantially changes. We continue a path of slow growth.
- Customer numbers are going to stay low for at least a year.
- Flexibility of employment contracts
- Hard to say yet at this point
- I can't predict yet.
- We can't say what's going to change in our own activities. Preparedness for such crises in the future would be necessary.
- Flexibility needs to increase. Binding agreements with suppliers and staff alike must be avoided. Now the cost savings to be made must remain permanent. Digitality is important so that marketing, as well as working methods, continue to grow.

- 
- Certainly, strict discipline on purchases and procurement and wages. Must tighten losses in the fall.
  - Perhaps domestic tourism will be more popular at least for a while after the coronavirus, giving us more opportunities. Since we are doing a lot of development measures now, our activities after the pandemic will hopefully be more effective and diverse.
  - Services and products have been developed to provide services to new groups of customers in other ways than before.
  - I think we stand steadier, that we found a concept that suits us better. More cooperation with other companies.
  - Guests will certainly be reluctant for a long time to make reservations with us. The number of customers is falling flat.
  - Everything

### **What does tourism look like in Finland/Sweden?**

The respondents do not believe that a rapid recovery will occur and that it may take several years before people dare to travel like they used to before. However, domestic tourism is believed to be growing exponentially. In the coming summer and perhaps in the coming years, regional tourism destinations will be favoured. Road-trip tourism and the use of one's own car to travel may increase. Finland and Sweden generally are viewed as safe travel destinations, as there are no large crowds here. However, the 'coronavirus policy' of Sweden has caused a debate about how safe it is to travel to Sweden and how welcome the Swedes are to tourists. Keep in mind that Finland hosts a large number of Swedish tourists. From an international perspective, Nordic countries can be interesting because we are not destinations for mass tourism, and we have awesome nature attractions. Nordic countries may even be beating the Mediterranean region in terms of popularity as a destination for travel because of our attraction factors related to new tourist preferences. Here's how respondents answered:

- Most likely fewer tourists
- Demand for domestic tourism is presumably exploding. The risk of infection at the same time is increasing. Throughout the country, tourism is increasing. These conditions will remain until people forget the coronavirus and return to previous habits, which can take five to 10 years.
- There is hope that, compared with Central Europe, Nordic countries' appeal will grow at the expense of the Mediterranean. Domestic tourism may also be growing.
- On the rise. Finland and Sweden are perceived as safe areas without large crowds.
- Local (regional) tourism as early as 2020 in late summer. In 2021, popular safe travel will lead the way without mass tourism.
- I believe and hope tourism will recover relatively quickly, but certainly people will be more cautious for some time.
- I think (tourism) will decrease.
- The proportion of foreigners is further reduced; domestic tourism is going to rear its head.
- Certainly, at the beginning, quiet, and if you hit the bankruptcy wave, then, of course, it will affect supply and attraction, especially if the ones who survive are big chains and small unique items/restaurants suffer and disappear.
- Domestic tourism is perhaps more popular than before the coronavirus. It will perhaps take some time for the foreign tourist flows to return to former levels.
- Tourism recovers, but development stagnates.
- I think people are starting to think in new ways, putting more effort into taking holidays in the Nordic countries and our beautiful nature. After all, it seems to be nature that people are drawn to!
- The coming summer and autumn will probably be too quiet in Finland and Sweden. People are afraid to travel like they used to.
- Local tourism increases using cars.

### What remains the same in your business? (Q15)

Basic service concepts, products, functions, stories and values will remain the same at companies after the coronavirus. Generally, companies are hoping to get back to normal, but some company functions will be developed further, and staff may have other/new tasks after the pandemic. In terms of the economy, several companies are concerned about whether they can continue as usual after the crisis due to a lack of revenue. Respondents' answers can be found in Table 12.

Table 12. What remains the same?

Everything	Focus on digital marketing. Values.
The basic concept remains.	Nature, accommodation and story at the destination are permanent.
Cruise operations remain unchanged. Add-on functions require a more flexible administration.	The main products remain intact.
We serve customers as before if there are customers	We are working to normalise our activities as much as possible.
Location	All basic functions remain, but some are in advanced form.
Partly the same employees, but probably with new tasks (to some) and new partners partly.	Most of business...
We are trying to continue as normally as possible, but financially, we are in a tight situation if there is no revenue.	Can't answer

### When the pandemic is over, what is your company going to pursue (e.g., new marketing, new collaboration patterns)? (Q17)

Looking toward the future, respondents aim to invest in three areas when the pandemic is over – service development, cooperation and marketing – which are all relevant to improve competitiveness. Here's how respondents answered:

- Develop a takeaway concept
- New collaborative patterns (product placement, influencers)
- The money is going to be tight for sure until the summer of next year, so big investments hardly will be made immediately. Social media are being exploited.
- You can't know yet whether you have the resources to turn to anything after the pandemic.
- Marketing in nearby regions
- Marketing and closer regional cooperation
- I will develop my store in Jakobstad as a tourist attraction.
- Connections and partnerships are already in place. What's worrisome is what can you properly invest in after a pandemic when there's no money?
- Marketing, boosting operations and practices
- Collaboration, digital marketing etc.
- Marketing targeting new customer segments and new partners etc.
- New marketing, some new forms of cooperation
- Can't invest if the money runs out.

Of course, all these investments depend on available resources.



### **Do you think tourist behaviour is changing due to the crisis (e.g., where to travel, when to travel, what kind of tourist destinations are favoured etc.)? (Q18)**

Respondents' opinions about changes in tourists' behaviour clearly indicate that they see a change in the tourism market after the coronavirus pandemic:

- Yes. Nearby, domestic and road-trip (caravanning) tourism increases
- The slow travelling trend will probably be strengthened, and group tours will at least sag for a while. The popularity of so-called tourist banks may also sag.
- Most likely more travel in the home country
- Over the next few years, peaceful nature sites will grow in popularity. Countries where the pandemic remained controlled have a one- to three-year head start. Air traffic is declining. Destinations from road trips or easily accessible by train become important.
- Air travel is declining. Recommend peaceful nature sites, which do not need to be booked in advance, but trips are made spontaneously if the situation permits. Nearby areas.
- I would think that nature and local tourism will grow in popularity.
- Yes
- I believe that behaviour will change. At least this year and next, domestic tourism is likely to be favoured.
- Yes, rural tourism, nature and domesticity
- Yes, the popularity of domestic tourism is increasing; there is a preference for safe destinations. Some are postponing tourism.
- Next summer, we will probably see more travel within the country and more local tourism. In the term, I guess one prefers to travel as an individual, not (in) groups (if the coronavirus stays), but then one travels even in foreign countries. I think the percentage of campers is increasing.
- Perhaps this little farm tourism business feels like a safer destination for travel.

### **3.4. Greetings to the development organisation from companies**

#### **What would you hope a destination organisation can do now?**

The companies were asked what they expect their destination organisation to do? Entrepreneurs and employees hope for the following:

- Marketing in Nordic countries
- Support for marketing to find customers
- Investing in marketing even more
- Investing in home markets (close markets) for now
- Staying in contact with entrepreneurs regularly
- Arranging webinars
- Being active with small resources
- Finding out what funding is available (other than Business Finland)
- Supporting local private companies and marketing them. For example, arranging an event for private restaurant and tourism entrepreneurs.
- I hope that destination organisations invest in marketing because most likely, companies are short on money and marketing. However, it would be vital that after a pandemic, it would attract customers.
- Now people (spend) more time than ever on digital channels, so the marketing of destinations surely could help many, and marketing money would get value, for example, ready-made summer vacation travel packages marketed to customers, nature packages, experience packages etc.
- It's always out of advertising money when you get the other stuff right.
- Maintaining a positive atmosphere

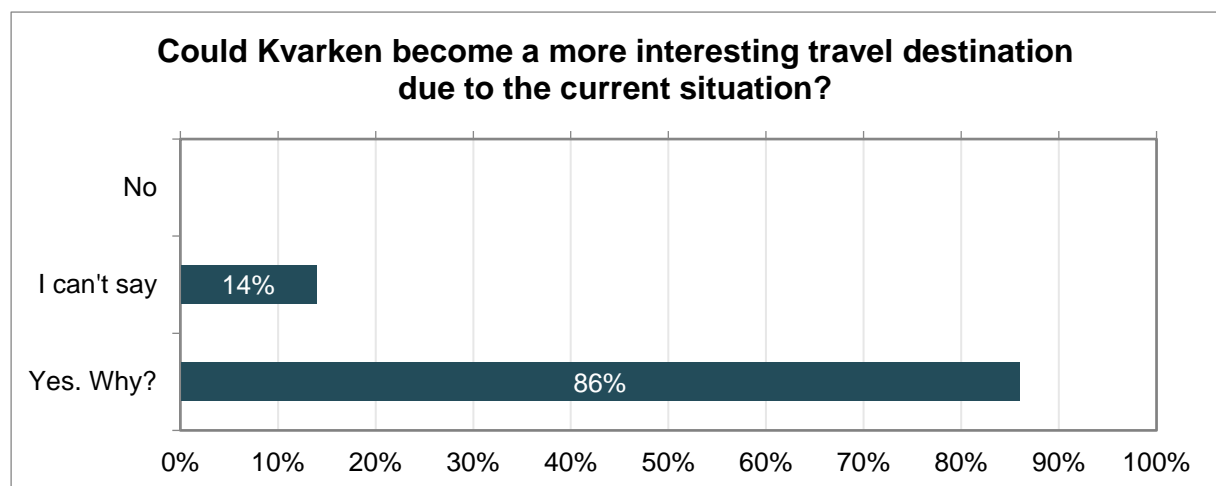
- Positive image marketing
- It is worth emphasising the possibilities of individual and self-sufficient travel, as is the philosophy of slow travelling and sustainable tourism. Our area has a lot to offer!
- Digital services in the region need to be developed. They need to be made more customer-friendly. New content needs to be created in storage. Current content needs to be updated.
- Promote our fine nature.

#### Could Kvarken become a more interesting travel destination due to the current situation?

The respondents think Kvarken will be a destination of interest during the post-coronavirus period (Table 13)  
Respondents named some of Kvarken's advantages and why they see the area's popularity growing in the future:

- There are few infections in the Kvarken region compared with other regions.
- Peaceful nature sites
- No mass tourism destinations, but safe experiences
- A diverse destination for nature and local tourism
- The awesome nature site and homeland will continue to be of increasing interest. There is a desire to support domestic businesses.
- Purity, space and nature
- Finland and Sweden are viewed as fairly safe countries
- We have nature, purity and social distancing.
- Nature and small travel destinations (are becoming) more popular.

Table 13. Interest in Kvarken destinations



#### Other comments are provided at the end of the survey (Q21)

- It would be interesting to hear what kind of thinking 'Nordic Marketing' has about German tour operators' thoughts.
- Finnish 'Sisu' for all this is bound to rise up and believe that there is life after the coronavirus
- We will be fine after the crisis; together we are strong!

### 3.5. Comparison between Finnish and Swedish tourism companies in the Kvarken region

The findings presented in this report have been compared with results obtained from similar studies done in Sweden to get a better understanding of the situation in the whole Kvarken area. In this comparison, we have studied the surveys done by Visit Umeå, Höga Kusten Destinationsutveckling and Region Västerbotten Turism. All three surveys on the Swedish side have been conducted approximately during the same period during March 2020, which indicates that they measured the climate during one particular phase, i.e., a snapshot of the pandemic curve. The study in Finland was carried out one month later. Furthermore, what differentiates this study from the ones carried out in Sweden is that we focussed on tourism companies engaged in the Destination Kvarken project, when the Swedish samples also included companies not necessarily engaged in the project. Consequently, the studies done in Sweden have a greater scope, but the business contexts and situations are so similar in the two countries that it is possible to compare them.

The pandemic heavily impacted tourism companies in the Kvarken area (Finland and Sweden), and it is relevant to talk about a 'coronavirus crisis'. Visit Umeå's study finds that the pandemic exerted a huge effect on tourism and commerce (Visit Umeå 2020). A large proportion of tourism companies (73%) in the Höga Kusten study reports that their turnover has dropped due to the coronavirus. Many companies say that they estimate a 70-80% decline in turnover. More than half of Höga Kusten's companies (57%) experienced a decrease in customers in late March, when the survey was conducted (Höga Kusten Destinationsutveckling 2020). Region Västerbotten also carried out a COVID-19 study (Region Västerbotten Turism 2020) involving hospitality industry companies in the Västerbotten region. The study received 362 responses from all municipalities in Västerbotten, and the findings state that the companies in the hospitality industry – including hotel accommodation, café, restaurant, transportation and event-organisier businesses – have been affected evenly by COVID-19, and that no differences exist in relation to the type of business or its geographic location. All tourism-related companies are equally concerned about the situation, and the industry is facing challenging times. In the coastal and inland municipalities of Västerbotten, entrepreneurs responded to COVID-19's effects the same way, i.e., companies' locations were irrelevant to the answers (Region Västerbotten Turism 2020).

#### **Tourism companies are concerned about the coronavirus impact and duration**

The degree of concern among tourism companies has been measured in some of the Swedish reports that we analysed. Our study on the Finnish side of Kvarken asked how concerned companies are that they won't survive the ongoing pandemic on a scale (1 = not at all concerned; 10 = very concerned). The average of the responses was 5.9, which can be interpreted to mean that companies are quite concerned that they won't come through the ongoing coronavirus crisis. Höga Kusten also studied how concerned companies are about the future on a scale of 1-10 (1 = no concern; 10=very concerned). The responses leaned toward the 'very concerned' end of the scale, with 24 respondents showing a degree of concern, at 7, 8 or 10. It should be noted that at the same time, eight companies responded '2', suggesting little concern. Höga Kusten's survey drew answers from 49 tourism companies who are members of the Höga Kusten Turism Organisation (Höga Kusten Destinationsutveckling 2020). Measured using the same scale as our and Höga Kusten's study 1-10 (1 = no concern; 10 = very concerned), most (60%) local tourism companies in the Umeå region reported being very concerned about their future. Umeå's study involved 139 local tourism companies (Visit Umeå 2020). From the companies' responses in both Finland and Sweden, it can be concluded that coronavirus is a serious matter for businesses and that companies are very concerned about the continuation of their livelihoods.

The tourism industry is struggling with the same challenges throughout the Kvarken region, e.g., customers cancelling their bookings and not re-booking. Companies have run out of cash flows and do not know how they will cope with this crisis. According to our analysis, entrepreneurs' views on COVID-19 are very identical in Finland and Sweden. Cross-cutting concerns in both countries include whether the companies will survive beyond the crisis

and how long the pandemic will last. Businesses are very concerned about the pandemic's duration. The duration's unpredictability distresses entrepreneurs in both Finland and Sweden. Some believe they will survive if the pandemic does not last too long, but at the same time, many face challenges in getting fixed expenses paid. Many of the companies have 'frozen' their plans for development and expansion.

### **What companies are doing right now as the summer season approaches**

Companies are laying off staff, adjusting hours of operation and seeking to reduce expenses as much as possible in both Finland and Sweden. Tourism companies have been trying to find ways to operate even during the crisis. In Finland and Sweden, similar solutions have been proposed to keep companies at least somewhat active. We mentioned earlier in this report what Finnish companies in our study have been doing during the crisis, and here are some answers from Swedish companies (data were collected from studies conducted in Kvarken, Sweden):

- Livestreaming concerts
- Take-away concept for food/a la carte/café service (fika)/after work
- Single-packed breakfasts
- Developing web stores
- Investing in digital marketing
- Posting on social media
- Finding other tasks for employees
- Marketing gift vouchers

Companies with the opportunity to serve customers during the coronavirus crisis have come up with new solutions for their operations by following instructions from the government. Unfortunately, some companies' offerings are not required at the moment because there are no customers. In these harsh conditions, some companies need financial support and are now trying to find the right channels to apply for aid money.

Visit Vaasa CEO Max Jansson was interviewed (Visit Vaasa, 2020) for our study to get more detailed information about how tourism companies in the region have handled the coronavirus crisis. According to Visit Vaasa, the reasons why tourism companies contact the destination organisation vary. Some are in economic distress, while others are inquiring about innovation services. For the most part, the companies are in need of hands-on help with economic matters. In this sense, many entrepreneurs are in complete shock: 'The entrepreneurs are contacting the destination organisation for advice, such as how to cope with the crisis and how to fill in the applications for business support', Jansson says (Visit Vaasa 2020). The current situation is that an application process may take such a long time that the companies may not survive while waiting for aid decisions. These companies with stable finances have it easier now because they can renovate or develop their operations, while those that recently have made investments are very vulnerable during this crisis. Companies are trying to be innovative, e.g., many restaurants have started selling take-away to survive the crisis. Despite new ways of operating, rent payments can be a challenging issue during these times (Visit Vaasa 2020). In fact, surveys indicate that paying the rent has concerned many companies during the coronavirus crisis – a problem found on both the Finnish and Swedish sides of Kvarken. At the end of the interview (Visit Vaasa 2020), Jansson stated, 'All in all, entrepreneurs still have faith in the future, but even so, many do not dare say aloud whether (their) companies will exist in six months. Also, plans are hard to make when no one knows about the coronavirus's schedule'. In our study, we did not ask the companies about the upcoming summer season, which was the case in the studies carried out in Sweden. Here, we can tell that the upcoming summer high season worries companies. For many tourism enterprises, the summer season is an important source of income because different events are held during the summer. Family parties, such as weddings, are major revenue sources for service companies. Companies report that many weddings and parties have been cancelled this summer. According to Umeå's research, 80% of the companies are extremely concerned about summer (Visit Umeå 2020). Höga Kusten's companies are also very concerned about the summer



season, with most placing their concerns in the 5-10 range, or 10 (1 = no concern; 10 = very concerned), which means companies are somewhat or very concerned about the summer (Höga Kusten Destinationsutveckling 2020). One of the main reasons for this strong concern is that many tourist companies make the bulk of their revenue during the summer season. At the time of this study, some companies have not even started the summer season. Concerns about summer business will certainly be tough, and even more so if the signals show that there may be no customers.

Companies are worried about personnel issues during this uncertain situation. In the tourism industry, good staff (skilled and motivated) play a crucial role, and employers clearly indicate that they are in a difficult situation when they are forced to lay off people and dismiss good employees. A dimension of this discussion is how the entrepreneurs will get laid-off employees back. The entrepreneurs in Finland also are concerned about how flexible current employees are when it comes to work hours and tasks, and how to keep up their motivation during the crisis. In Sweden, it was mentioned that in one restaurant, the skills of the restaurant staff are being developed during the break due to the pandemic. Coronavirus has caused summer uncertainty and recruiting summer workers has been out of the norm. Some of the companies have not hired summer staff at all, and one entrepreneur in Höga Kusten is trying to determine how many summer workers will be needed for the summer season if domestic tourists show up (Höga Kusten Destinationsutveckling 2020). Personnel issues come up often in both the Finnish and Swedish surveys.

#### **No big differences in how companies face the coronavirus on both sides of Kvarken**

COVID-19 is a global phenomenon, and Finland and Sweden have applied different strategies to their predicaments. Obviously, the ways in which different governments handle the coronavirus crisis in terms of crisis communications and company support programmes affect these entrepreneurs' faith in the future. Restrictions related to coronavirus also vary from state to state. For example, in Finland, restaurants had to close for normal sit-down service and only could offer take-away services. This was not the case in Sweden.

The sense of security when travelling will affect travel behaviour. Critical for the near future is when and to what extent domestic tourism will make up for the reduced number of international tourists travelling to Finland and Sweden. The role of 'staycations' as an option has been discussed.

If we try to look for differences between Finnish and Swedish companies, it can be seen how Swedish entrepreneurs have a stronger belief in the 2020 summer season. This relies on the belief that Swedish domestic tourism will bounce back faster than in Finland. In Finland, respondents assumed that domestic tourism will follow a more general pattern, as will the recovery, at the same pace as tourism in general. Finnish entrepreneurs had little positive to say about the 2020 summer season. A general conclusion is that Swedish respondents are more optimistic about the coming summer season compared with the Finns, but Swedish firms' responses reveal the fear of not having enough customers this summer and a high degree of concern regarding the summer season.

What kind of aid are tourism companies hoping for now? The Finnish and Swedish companies have similar needs in the middle of the crisis. Businesses need financial support, such as relief for rent, assistance with human resource matters, compiled information on support opportunities and help with marketing. A Finnish entrepreneur states, 'I hope that destination organisations invest in marketing because most likely, companies are short of money and marketing. However, it would be vital that after a pandemic would get customers'. In our study (Finnish Kvarken), companies were hoping for all kinds of marketing support from the destination organisation. In particular, the companies proposed that in marketing activities, destinations should focus on Kvarken's attractiveness factors, such as nature, space and sustainable tourism.

### 3.6. Kvarken destinations during the recovery process

#### **Finland and Sweden have potential for post-coronavirus tourism**

In the future, Kvarken might become an even more interesting area for foreign tourists to visit. Finland and Sweden, Ostrobothnia and Westrobothnia, very much have attractions and features that travellers might be looking for on their holiday after a coronavirus pandemic. Tourist experts are now discussing that in the future, tourists may not want to travel to crowded destinations, like big cities. Instead, pure nature and space to move around in a more private way can be expected to be a value dimension for tourists when choosing destinations.

Visit Finland arranged the webinar 'COVID-19 - Outlook on tourism industry in European markets after the outbreak', in which Visit Finland's market representatives from different European markets – i.e., Germany, Russia, UK, Spain, Italy and France – commented on the state of the coronavirus in their countries (Visit Finland webinar 23 April 2020). In addition, they discussed travel opportunities and trends from the coronavirus, and pondered Finland's potential as a travel destination after the coronavirus crisis. Here are some comments from the webinar, concerning why Finland could be an interesting travel destination after the coronavirus:

- Finland has great potential in (the) post-coronavirus period
- Finland has amazing nature, and it is clean in Finland
- Coronavirus may make nature, outdoor products and wildlife become even more interesting
- Safety and cleanliness are the things that matter!
- Real Finnish authenticity is a valuable USP!
- Travelling in a group is not necessarily a popular alternative. More individual travelling, such as cottage holidays (second homes), can be a preferable option in the future.
- For Russian tourists, trips to Europe are interesting prospects for the post-coronavirus period.

Although the comments made are related to Finland, they can be generalised to the whole Kvarken region, including Sweden. Consequently, both Finnish and Swedish Kvarken seem to have a good chance of performing well during the competition among tourist destinations.

However, the international travel market's recovery process may take a long time. Ministry of Economic Affairs and Employment of Finland (TEM) estimates that international tourism will not return to pre-crisis levels until after 2021. Generally, tourism in the past has rebounded quickly, in about six months, after international crises such as the SARS epidemic and economic depression. However, it is now predicted that tourism will take longer to recover from the coronavirus (Kyyrä 2020).

International tourism is influenced significantly by the transportation sector, route systems and structures, accessibility and attitudes towards flying. For example, it is estimated that airfare prices will increase. It is also worth noting that although people want to travel, they are concerned about the health effects from flying, i.e., 'biosecurity' (Lehto 2020). According to marketing representatives from Visit Finland, tourism will take a long time to recover. Marketing representatives also said that after reopening borders, it may take time before people start travelling again. Unemployment and other economic problems cause reduced income for many; therefore, people do not have money to travel, and in the case of travelling, a need for budget alternatives probably will exist. The UK representative expects that younger people will travel first after coronavirus restrictions are repealed because they are not as afraid of the coronavirus, while seniors may need to remain in quarantine for a long time to come. It also was noted that expensive travel insurance can be a challenge for tourism in the future (Visit Finland webinar 23 April 2020)



The European Commission is working towards European tourism's recovery. The essential factor for European tourism to reopen is that internal border controls must be removed, allowing people to move freely again. The basis of everything is that it is healthy and safe for people to travel. During the current crisis, tourism companies need funding to survive. In addition, companies need support and advice to develop safe tourism products. As part of tourism's recovery, the commission agrees with other tourism actors in relation to domestic tourism. It is essential in tourism companies' recovery that people can find domestic travel (already this summer, if it is possible in terms of the epidemic) and that European countries are marketed as safe destinations (European Commission 2020).

Domestic travel will reopen before international travel. All webinar experts (Visit Finland webinar 23 April 2020) agreed that domestic tourism will begin before international tourism. They also forecast that domestic travel will increase significantly during the coronavirus. Nordic countries' (Norway, Sweden, Denmark, Finland et al.) populations were surveyed about how they think consumers' purchasing behaviour will change after the coronavirus. According to Mantap's study, with 4,156 interviews, domestic tourism will increase. Even if people choose not to travel abroad, there is still the basic need to travel and experience new places (Mantap 2020).

## 4. Discussion

The findings presented in this report, based on a survey among Finnish tourist firms involved in the Destination Kvarken project, clearly indicate the strong effects that the coronavirus pandemic have exerted on the tourism business. Respondents expressed many types of concerns, both personal and those of consequence for companies and staffs overall. Insecurity about the future, when the pandemic will end and when business will return to function under what often is described as 'the new normal' are an inconvenient situation that influences central business activities such as planning, marketing, service development and employment.

The findings from the Finnish sample do not come unexpectedly, with similar results presented in other studies, both national and international ones. For example, when we compare the findings presented in this report with the findings from similar studies conducted in Sweden (findings from the Höga Kusten Destinationsutveckling, Visit Umeå and Region Västerbotten Turism reports), it can be concluded that very similar patterns of concern can be found among respondents.

Tourism companies in the Kvarken region face the coronavirus situation very similarly. Companies' stress factors are related to health, finances and whether companies will survive. The findings indicate that tourism companies in the Kvarken area are very concerned about cash flow and how to secure future incomes. At the time of our survey, companies laid off staff, adjusted hours of operation and modified other functions. Some of the companies have not been able to function normally due to coronavirus restrictions (Finnish Kvarken). Personnel issues were of concern among the Swedish companies, and we can add that this is also an issue among Finnish tourism firms. Furthermore, the tourism companies are worried about staff motivation and flexibility, and whether or not good workers will be available after layoffs. The hiring outlook for summer workers is also unclear because it is not known what summer 2020 will look like.

Companies are not completely paralysed by the coronavirus. Tourism companies have been forced to come up with alternative ways of doing business. Restaurants have adopted the take-away concept, and according to many, the concept will remain after the coronavirus. Some companies have been able to take advantage of the coronavirus period for development. The respondents say they will design new products for new target groups, e.g., smaller groups of customers. Many say that they have used coronavirus time to promote their companies' digital commerce, such as developing webpages and booking systems. Based on the answers we received from companies and the interview with Visit Vaasa CEO Max Jansson, it appears that companies (at the time of this writing, in the middle of the coronavirus crisis) can be divided into two groups: 1. those with finances to develop their operations now (when there are no or few customers), and 2. those who recently made big investments, so that the drain on funds at this point is a disaster. On the positive side, during this extraordinary time, it can be concluded that the companies have planned for the future and already are actively planning for improved competitiveness.

However, summer 2020 worries the respondents. Companies in Sweden seem to be more optimistic about the summer compared with their Finnish counterparts. However, Swedish tourism companies still are predicting a weak summer, even if domestic tourists show up. Generally, it can be said that tourism entrepreneurs and experts believe that domestic tourism will recover first before international tourists arrive, and that tourism and tourist behaviour are going to change after the coronavirus. In this, the companies are wondering what the 'new normal' will be like. If nature, space, authenticity and safety will increase in significance when tourists make travel decisions, the Kvarken region might be a winner.

Despite all the worries, Finnish tourist entrepreneurs in Kvarken have faith in the future. Perhaps they have been monitoring the situation and believe in the Kvarken region's attraction potential for post-coronavirus tourism. In



fact, Kvarken destinations may correspond with tourists' evolving preferences. The region has nature and space to move about without crowds. Tourism professionals are now talking about how people prefer to travel more privately and avoid travelling in groups. In our study, companies believe that 'Kvarken destinations' have the potential to be more interesting after the coronavirus crisis. According to the companies in this study, the reasons include peaceful, awesome nature sites; purity; and space. One entrepreneur notes that 'Nature and small travel destinations become most popular and, therefore, Kvarken thrives as a tourist destination'. Other reasons that respondents mentioned include: 'Kvarken is not a mass tourism destination' and 'In Kvarken, you can enjoy safe experiences and in general, Finland and Sweden are considered as fairly safe countries'.

Coronavirus certainly causes concern for the tourism industry, but also energises companies' innovation processes, forces destination marketing organisations (DMOs) to rethink their strategies and opens up inter-organisational (destination) cooperation. By working together, sites in the Kvarken region would be significantly more visible internationally. Tourism services are most often a package of different services at a destination. The tourist needs hotel accommodations, interesting activities, good food, transportation and a warm welcome to be satisfied. Destination success seldom comes from one company being successful, but rather from collaboration and packaging different types of services. In this respect, DMOs play an important role in synchronising demand and supply, as well as orchestrating service offerings for marketing support. Asking respondents how DMOs could help elicited the following comments:

- I hope that destination organisations invest in marketing because most likely, companies are short on money and marketing; however, it would be vital for getting customers after a pandemic.
- Market in Nordic countries
- Invest in the home market (close markets) for now.
- Be in contact with entrepreneurs regularly.
- Arrange webinars.
- Determine what funding is available.
- Maintain a positive atmosphere.

DMOs are expected to help with funding and marketing support. According to a few respondents, DMOs' role also could be to maintain a positive atmosphere during the crisis. Something good can come from this crisis. Collaboration between destinations and tourism companies is key to achieving greater international visibility. Tourists do not come to Kvarken to use only one company's services, but they must have a package that includes several companies' services. DMOs are viewed as key actors in the collaborations responsible for assembling services under the Kvarken umbrella.

For companies, the 'new normal' will have consequences. Risks and security issues need to be redefined in tourism, as tourists' preferences on where to travel and what types of destinations to visit will change. Finland has been viewed as a safe tourism destination in terms of non-violence and crime. From now on, health risks will be associated with tourism even more, an aspect that Finnish and Swedish companies should reflect on and discuss.

The companies analysed for this study anticipate that tourists' behaviour will change. A drop in the number of customers in 2020 is ensured, and to what extent tourists will travel in the future is unknown. Speculators say that in the future, it might be even more important to pay attention to customer segmentation and to emphasise green, clean and safe tourism that promotes individual travelling – a reason for tourism companies to analyse their current service offerings critically. In waiting for the future, we hope that domestic tourism will recover as fast as possible and that international tourists will view the Kvarken region as the place to visit in 2021.

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### Destination Kvarken - Tillsammans klarar vi av Coronakrisen

Vänligen besvara samtliga frågor så utförligt och uttömmande som möjligt. Undersökningen följer Hanken Svenska handelshögskolans GDPR principer.

#### 1. Företagets / besöksmålets namn

#### 2. I företag/besöksmål är jag

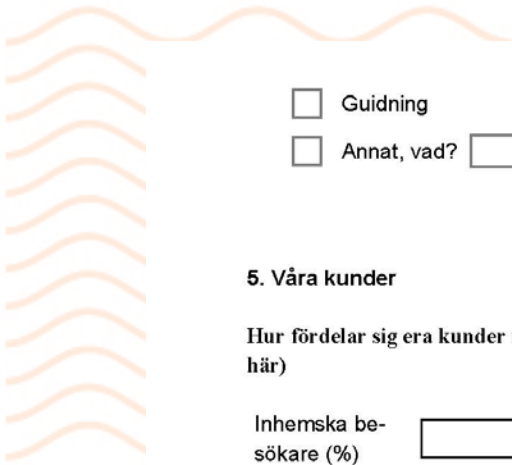
- ☐ Företagare  
☐ Anställd

#### 3. Hur många år har företaget / besöksmålet varit verksamt inom turism

- ☐ Under 1 år  
☐ 1-5 år  
☐ 6- 15 år  
☐ 16-30 år  
☐ Över 30 år

#### 4. Vilket / vilka är företagets verksamhetsområde/n

- ☐ Inkvartering  
☐ Evenemang  
☐ Restaurang  
☐ Aktiviteter  
☐ Transport, färjverksamhet, kryssningar  
☐ Resebyrå  
☐ Konferens  
☐ Badinrättning, välbefinnande, Spa



☐ Guidning

☐ Annat, vad?

##### 5. Våra kunder

Hur fördelar sig era kunder mellan inhemska (%) och utländska (%) besökare? (Bara markera siffrorna här)

Inhemska besökare (%)

Utländska besökare (%)

##### 6. Från vilka länder kommer de utländska besökarna i huvudsak?

##### 7. Till vilken organisation hör ert företag?

- ☐ Visit Kokkola  
☐ Visit Pietarsaari - Jakobstad  
☐ Visit Vaasa  
☐ Visit Kristinestad  
☐ Visit Lakeus

##### 8. Utgå från dig själv som person. Vad oroar dig mest till följd av coronapandemin? (Nämn tre saker)

1

2

3

9. Utgå från företaget (företagets problem). Vad oroar dig mest till följd av coronapandemin?  
(Nämn tre saker)

1

2

3

10. På en skala 0 – 10, hur orolig är du för att företaget inte klarar coronapandemin?

Inte alls orolig  Skala Mycket orolig

11. Efter det att coronakrisen bröt ut, hur har din verksamhet och din verksamhetsplanering sett ut?

- ☐ Verksamheten och planeringen har fortgått så som tidigare (oförändrat)
- ☐ Verksamheten och planeringen har ändrats. Vad har ändrats?
- ☐ Kan inte svara

12. Har du funderat på företagets fortsatta verksamhet efter coronapandemin?

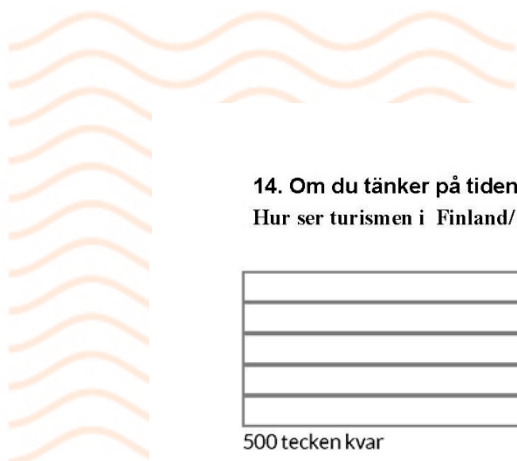
- ☐ Nej
- ☐ Ja, vad har du planerat?

13. Om du tänker på tiden efter coronakrisen.

Vad tror du har ändrats i ditt företag?


500 tecken kvar





**14. Om du tänker på tiden efter coronakrisen.**

Hur ser turismen i Finland/ Sverige ut?


500 tecken kvar

**15. Om du tänker på tiden efter coronakrisen. Vad kommer att vara sig likt i företaget?**


500 tecken kvar

**16. Kan du under denna coronapandemitid vidta åtgärder eller göra utvecklingsarbete som skulle göra att du är bättre rustad då läget normaliseras.**

☐ Nej

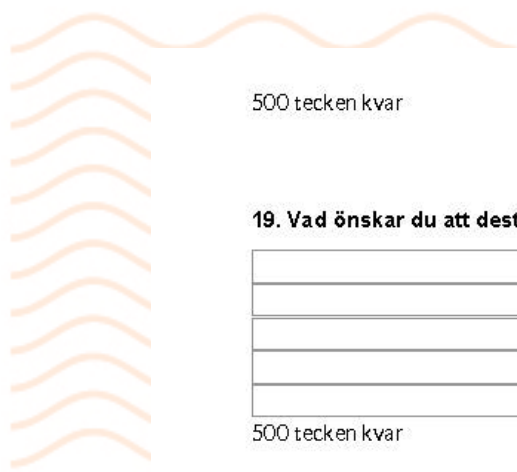
☐ Ja, vad kan du göra?

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**17. Efter det att pandemin är över, vad kommer företaget att satsa på? (t.ex. ny marknadsföring, nya samarbeten)**


500 tecken kvar

**18. Tror du att turisternas resebeteende kommer att ändra till följd av coronakrisen? (t.ex. vart man reser, när man reser och vilken typ av destinationer som prioriteras osv.)**

500 tecken kvar

**19. Vad önskar du att destinationsbolagen nu skall göra?**


500 tecken kvar

**20. Kan destination Kvarken i dessa tider bli ännu mera intressant som besöksmål?**

- ☐ Nej
- ☐ Kan inte svara
- ☐ Ja. Varför?

**21. Andra kommentarer**


The Destination Kvarken project will help small and medium enterprises with focus on hospitality industry to reach out to new and bigger markets for more growth and competitiveness.

The purpose is to increase the amount of visitors in the region.

Read more: [kvarken.org/destinationkvarken](http://kvarken.org/destinationkvarken)

Projekt Destination Kvarken ska hjälpa exportmogna små och medelstora företag med fokus på besöksnäring att nå ut till nya marknader för ökad tillväxt och konkurrenskraft.

Syftet är att öka antalet besökare i regionen.

Läs mer: [kvarken.org/destinationkvarken](http://kvarken.org/destinationkvarken)

Hankkeessa Destination Kvarken autetaan matkailuelinkeinon parissa toimivia vientikelpoisia pk-yrityksiä saavuttamaan uusia, yrityksen kasvuun johtavia ja sen kilpailukykyä parantavia markkinoita. Tavoitteena on lisätä alueen kävijämääriä.

Lue lisää: [kvarken.org/destinationkvarken](http://kvarken.org/destinationkvarken)

[WWW.KVARKENDESTINATIONS.COM](http://WWW.KVARKENDESTINATIONS.COM)

