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Recovery strategies for the accommodation industry after Covid-19 restrictions in the Wye Valley

CASE: WHITE FEATHER

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<tr><td colspan="3">The following case study-based thesis focused on analysing how the Covid-19 restrictions had shown in the accommodation industry businesses in the Wye Valley, United Kingdom. These results and theory would be used to create recovery strategy suggestions for the case company White Feather. The objective is to help White Feather and its B2B customers recover successfully after the easing of Covid-19 restrictions in the United Kingdom.

The first part of the theory comprised of understanding the history and current situation of the Wye Valley tourism industry. This was followed by the Covid-19 restrictions in detail as well as comparison into the 2019 tourism in the United Kingdom and during the pandemic. The main theory that acted as the foundation for the recovery strategy suggestions was tourism crisis management.

The practical part gathered data using qualitative interviews and a quantitative survey from Wye Valley accommodation property owners. The results of the two methods were analysed and combined. Based on the conclusions, recovery strategy suggestions were tailored for White Feather and the accommodation property owners.

In the end, results of the thesis revealed a positive outlook on the recovery of the tourism industry in the Wye Valley. However, the results also revealed a scarcity of confidence in crisis management from the property owners. Thus, the recovery strategy suggestions were also made as a foundation for individual business crisis management plans for the future.</td></tr>
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CONTENTS

1 INTRODUCTION

The coronavirus pandemic (Covid-19) which started in December 2019 quickly shook the whole world and its industries (Gössling, Scott & Hall 2020). The tourism industry is one of the worst affected (Collins-Kreiner & Ram 2020) due to its intangible nature, implying that products and services are permanently lost due to businesses being closed and travel bans being placed around the world (Gössling et al. 2020). In the United Kingdom (UK) since March the 23rd in 2020, guidance has been to avoid all but necessary international travel and with different lockdowns and tiered restrictions stepping into place this also applied to domestic travel (Website of the United Kingdom Government 2021).

Research has already started to venture into possible end scenarios for the pandemic (Gössling et al. 2020). This has introduced research focusing on the possible post-pandemic tourism recoveries and rehabilitation. However, the recovery strategies surfaced, seem to have a generalised focus and do not consider a company's resources or geographical location. (Collins-Kreiner & Ram 2020.) Hence, there is a need for customized suggestions for recovery strategies for the commissioner and partner companies involved. Looking into a specific company and area creates a better chance of planning a recovery strategy that is suitable for the company based on its resources and location.

The topic of this research is to investigate the implications of Covid-19 restrictions on tourism in the Wye Valley and how the local accommodation companies have experienced the situation. The main body will focus on looking into the tourism accommodation management company and my current employer, White Feather, which was established in 2018 by the owner Emma Nelson. The company originally started with only managing their own property but soon with increased demand moved onto managing more than 20 other properties in the area. (Website of White Feather Management 2021.)

2 PROBLEM SETTING AND CONCEPTUAL FRAME OF REFERENCE

The purpose of the thesis is to study the implications of Covid-19 restrictions within England and Wales and how the companies located in the Wye Valley have responded to them, in order to create possible recovery strategy suggestions. Interviews and a survey will be conducted to determine how the companies have experienced the restrictions and how its effects have shown throughout the pandemic. Objective of the study focuses on creating recovery strategy suggestions for White Feather and business customer companies by analysing the noticed effects, reactions and looking into tourism crisis recovery planning and theory. The suggestions will be created with the commissioner's and companies' resources, market and services considered.

The main research problem that the study is aiming to answer is: *what recovery strategies could be implemented after Covid-19 restrictions in the Wye Valley*? This is assisted by three sub questions:

- How have the property owners in the Wye Valley reacted to the Covid-19 restrictions?
- How have the restrictions showed in the tourism companies in the Wye Valley?
- What have the restrictions entailed?

The questions aim to be answered through theory along with qualitative and quantitative methods of the survey and interviews.

2.1 Delimitations of the thesis

The full impacts of the governmental restrictions surrounding the Covid-19 situation around the world still remain unknown. Thus, it is necessary to include delimitations for this thesis to be able to produce concrete results that can be implemented. The thesis focuses on the case accommodation companies in the Wye Valley and how they have seen the implications of Covid-19 restrictions in England and Wales. Therefore, the study will focus on providing recovery strategies and analysing the current situation for and with White Feather in mind. Even though the results of the study can be used by other companies in the industry, they are created with White Feather and its business customer companies and their resources considered.

While also looking into Covid-19 and its restrictions during the study, the aim is to focus on the restrictions that have only taken place in England and Wales starting from March 2020 to planned reopening in spring 2021. Meaning that the thesis does not aim to study the full impacts of Covid-19 in the area but to focus on how the restrictions have shown in the case company and its business customers and what the reactions have been. With the delimitations in mind, providing the possible recovery strategy suggestions is easier and will focus on the case company only instead of trying to understand the full impacts of Covid-19 in the area.

2.2 Conceptual frame of reference

A conceptual framework is used in research to understand and simplify the process and structure of the research. In addition, it is used to inform about the connections between the research's important aspects. In the thesis process, a conceptual framework is an important step to help the reader and the writer understand the process and structure of the research ahead. (Adom, Hussein & Adu-Agyem 2018, 438.) The thesis structure is comprised of the following:

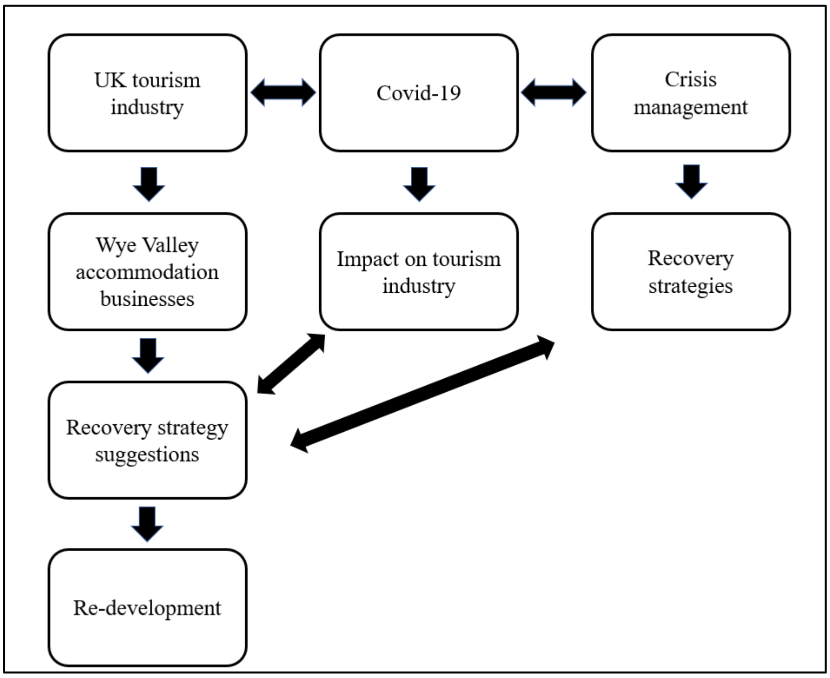


Figure 1. Conceptual framework of the thesis.

3 WHITE FEATHER

The case company and commissioner White Feather is comprised of two different sectors of the company, White Feather Management and White Feather Holidays. White Feather Management was created in 2018 due to the owner's, Emma Nelson's, realisation of the lack of help accommodation property owners get for their business. The business was set up as a holiday let property management company. Nelson wanted to make sure property owners can enjoy quality housekeeping services, go away on their holiday, and to not worry about customers receiving help when they do not have the time. Thus, White Feather Management was created to help property owners either with bookings, housekeeping, social media or to take them under full management to manage all the aspects mentioned above. An option to have management just for the duration of your own holiday also became possible for local accommodation companies. (Website of White Feather Management 2021.)

Alongside White Feather Management, White Feather Holidays was born in 2020 to market and promote the properties under management (Website of White Feather Holidays 2021). The focus is on business to customer (B2C) while the management side focuses on business to business (B2B). Both sides of the company aim towards the value of a great customer experience and providing quality and reliable service with a hint of luxury in the mix. (Website of White Feather Management 2021.)

White Feather Holidays and Management both work with two different income bases. Revenue from properties who have paid for a booking management service comes through commission received from the price the customer has paid for the stay. (Vanloo, personal communication on 20.8.2021.) The cleaning and social media services are provided on an hourly rate based on how many times a week the business requires these services. The social media packages are also being remodelled as the demand for the service has increased due to the pandemic. The services would instead of hourly rates be provided as different level packages depending on the number of platforms, posts and algorithm knowledge needed. (Vanloo, personal communication on 20.8.2021.)

The pandemic put the revenue of the company on hold and forced the owner to make drastic decisions in changing its staff to self-employed status in order to lower costs and offer better opportunities for the staff to apply for governmental support. During spring 2021, like many businesses in the area and UK, White Feather suffered from lack of staff and the hectic period of reopening. However, the pandemic created a perfect marketing and growth opportunity as more and more properties came on as clients, more services were created and offered and development that normally would not be possible due to time restrictions took place. (Vanloo, personal communication on 20.8.2021.)

The current situation, in early 2021, of the tourism industry in the UK is a huge question mark for White Feather and all accommodation customer companies in the Wye Valley. Full return to normal and what the tourism numbers will be are still under speculation (Website of Visit Britain 2021). However, with the current information available, international tourism will not be allowed to return for a while, thus the focus on domestic tourism is important. The pandemic has taught the importance of appreciating the areas around you and many companies focused on domestic and local marketing during the summer of 2020. (Accumulate Capital 2021, 3.)

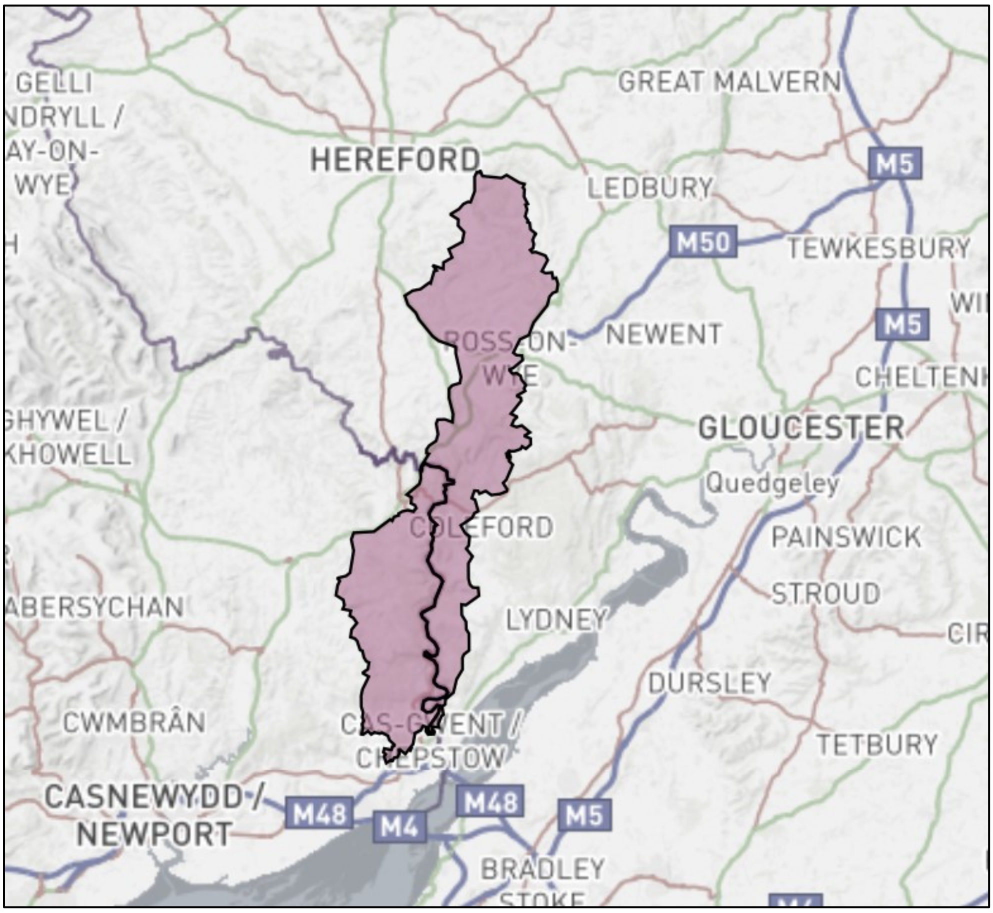
All of this gets combined into the current difficult situation of Covid-19 within the UK. Better news about the upcoming new leaf for tourism brings hope of smooth recovery but also uncertainty of what the full recovery strategy and planning for many companies will be in the end. Thus, there is a need and an opportunity to help reflect and analyse what the implications of restrictions have been and how they have shown in the accommodation companies within the Wye Valley, while combining the information with research to provide recovery suggestions. The following research combines many different aspects of previous studies, considering tourism crisis management and recovery strategies together with Wye Valley’s tourism.

4 TOURISM IN THE WYE VALLEY

The Wye Valley is located in the southwest of the United Kingdom and covers land in both England and Wales (Website of the Royal Forest of Dean 2021). This can be seen from Picture 1 and Picture 2 that show the location of the Wye Valley. Picture 2 also shows the England and Wales border in black that divides the Valley into two. The area is the only protected landscape that is located across borders (Website of Wye Valley AONB 2021).The area has received the title of Area of Outstanding Natural Beauty (AONB) due to the richness of wildlife and scenic nature around it (Website of Wye Valley AONB 2021). Not only that but some parts of the Valley area have acted as the start of UK tourism since the 18th century.

The area got its fame over the boat and ferry tours that took part in the late 1700's and are still arranged due to the nature and towns retaining their visual beauty to this day. (Lam 2020.) The nature and historical sites of the area remain intact and mostly untouched by the modernising aspects of city development (Website of Visit Wales 2021). According to the 2020 management plan conducted by the Wye Valley AONB office, the River Wye located within the valley remains UK's favourite river. The Valley still attracts over 2 million tourists annually. (Wye Valley AONB 2020, 5.)

Picture 1. Wye Valley AONB (Website of Landscapes for life: The National Association, Areas of Outstanding Natural Beauty 2021)



Picture 2. Wye Valley AONB close up (Website of Lle a Geo-Portal for Wales 2021)

The main tourism focus of the Wye Valley is nature tourism and historical sites. These sites include for example Tintern Abbey, church ruins from the 13th century; old railway stations and the imprint of the industrial period that can be seen even in the landscape. (Lam 2020.) A lot of the area used to focus on mining, which created some of the hill and valley sites you see today, covered now by the nature and forest (Website of Visit DeanWye 2021). In addition to historical and nature tourism, the area has attracted some niche tourism through movie and series filming locations in the area. These include anything from the blockbusters of Star Wars, Doctor Who to smaller modern series like Sex Education. The tourism companies in the area have taken advantage of these opportunities by organising tours or advertising when a new season or a movie is being filmed in the area. (Website of Visit DeanWye 2021.)

The area is dominated by the domestic tourism market with an estimate of over 1,9 million visitor nights annually being from the UK while abroad visitor nights are around 790 000. However, where the Wye Valley surprises is in its numbers of second homes and holiday lets. (Website of WyeDean Tourism 2021.) They have been gaining popularity throughout the years, and in 2018 according to the Wye Valley and Forest of Dean tourism statistics (2018) they accounted for over £400 000 of spending in the area. Though, a lot of the tourism revenue of the area comes from its day trip industry, with spending in 2018 being over £200 000 000. The international pull factors are limited due to the infrastructure that limits the access to the Wye Valley. The major airport hubs being Heathrow and Gatwick both located in London give a disadvantage to the area in terms of location for international tourists. However, the location of the Wye Valley, for people living within the UK can be an advantage. From most areas in the UK the trip to the Wye Valley is simple and quick, done by either driving or train. Connections run through London and UK's second biggest city of Birmingham. (Google, n.d.)

The Wye Valley is highly dependent on its natural beauty and environment biodiversity. Due to the region's shortage of job opportunities most of the income to the area depends on the forestry, agriculture and tourism. The tourism industry contributes to the local economy highly and continues to do so after decades since the destination's debut. Yet, being dependent on the natural beauty comes with the risk of tourism numbers declining if the natural beauty of the area is damaged. For example, limestone mining along with river pollution have contributed to future worries for the tourism industry. (Wye Valley AONB 2020, 67.) The Wye River has already suffered greatly in the last decades from agricultural pollution leaking into its waters. This is already damaging its natural beauty as growth of algae is changing the river's looks that in turn affect its attraction for swimmers and tourists. (Monbiot 2021.) The future even past the pandemic brings different questions for the Wye Valley as part of the popular domestic tourism destinations of UK.

The future tourism of the area post-Covid-19 is still uncertain. Gathering from the case company's preparations and marketing of the accommodation properties seen on social media, tourism is returning in spring 2021 with full force. The expectations for the domestic tourism rise bring hope to many of the local accommodation businesses. In addition, with the new law change to ban international trips without a reasonable excuse in early 2021, domestic tourism will hopefully see an even bigger rise. (Nelson, personal communication on 1.3.2021.)

According to the Destination Management Plan for the Wye Valley and Forest of Dean (2015), nature area partly inside the Wye Valley, the key priorities for tourism development in the area focus on co-operation, marketing, and business development. The tourism industry being the main contributor to the economy of the area makes it an important focus for all stakeholders and businesses involved. Thus, the destination management plan plays emphasis on the co-operation between companies and stakeholders.

5 COVID-19 AND THE UNITED KINGDOM

Coronavirus also known as Covid-19 is a droplet transmittable disease (Jamaludin, Azmir, Mohamad Avob & Zainal 2020, 165) originally discovered in the Chinese region of Wuhan at the end of 2019. The virus slowly spread around the globe, which required countries to impose restrictive measures on social contact and traveling. (Website of World Health Organization 2021.) This obviously shook the tourism and hospitality industries severely and forced most of them to a complete close of services (Hall, Scott & Gössling 2020).

No pandemic before has had a similar effect to the overall economy and the whole world than Covid-19. In the beginning of 2020 one by one countries entered lockdowns with almost everyone implementing restrictions of some kind by end of March. It was estimated that the number of people experiencing restrictions in 2020 was close to 90% of the world’s population. (Gössling et al. 2020.)

The tourism industry could not comprehend the scale of Covid-19 restrictions and how devastating the losses of tourism revenues would be (Gössling et al. 2020). Just at the beginning of 2020 United Nations World Tourism Organization (UNWTO) announced that the losses could be a few percent and not more. However, by the end of March this estimation had gone from a couple percent to even as high as 30% loss. Even with many industries and companies putting in their own predictions of the total losses or impact of Covid-19, the numbers cannot be taken as fact due to the pandemic's development still being uncertain (Gössling et al. 2020). By the end of 2020, tourism numbers had lowered to levels not seen in over 30 years in the tourism industry (Website of UNWTO 2021).

The pandemic has lasted until 2021, meaning that we can slowly start to see more statistical impacts it has had on the tourism industry around the globe. The high drop of ~70% on international tourism in 2020 is further devastated by the massive drop of 87% in the beginning of 2021. This is of course due to restrictions coming back up in multiple countries. (UNWTO 2021, 1.) The UNWTO in their World Tourism Barometer and Statistical Annex (2021) gave predictions of the scenarios for tourism development and recovery in 2021. The scenarios depend on two different times of tourism rebound, one already in July and the other one in September. Depending on the time for tourism rebounding to be able to start, the UNWTO predict 66% or a 22% increase in international tourism arrivals compared to last year. However, these recoveries depend a lot on agreements between countries of travel regulations but mainly on the vaccination achievements in the beginning of 2021. Thus, predictions for the future of tourism even in the current year prove to be difficult. (UNWTO 2021, 5.)

5.1 Tourism in the UK

The United Kingdom (UK) attracts millions of visitors every year. According to the Office of National Statistics just in 2019 alone over 40 million tourism visits were made to the UK. Also, during the year 2019 according to the Office for National Statistics, visitor spending was over £28 billion. Thus, we can gather that the tourism industry within the UK is vast and still growing. Domestic tourism in the UK has also been on the rise in 2019 with close to a 100 million overnight stays. This comes with spending of over £19 billion at the end of 2019. (Website of Visit Britain 2021.)

The UK has deemed their top markets of London and Birmingham for inbound tourism accounting for over half of the visits made to the UK. However, throughout the years the main attracting markets have become less and less of the highlight with people exploring more of United Kingdom than just the main cities. (Website of Office for National Statistics 2021.) Thus, through tourism companies plus the government's effort, the tourism management focus has also started to shift towards other markets and promotion (Department for Digital, Culture, Media & Sport & Glen 2017).

In UK governments tourism management plan, the *Tourism Action Plan - One Year on*, the focus of the tourism development was on the European Union exit, culture, funding and the overall industry development in jobs, skills, and co-operation. Off season promotion and support for small tourism businesses is on the forefront of the government's focus when it comes to tourism industry in the 21st century. (Department for Digital, Culture, Media & Sport & Glen 2017.) This can be seen even after the estimated drops to tourism in 2020 statistics and the lowered expected numbers for tourism in 2021. Currently the expected loss for the year 2020 is over 70% compared to the previous year of 2019 while the expectation for 2021 is to increase tourism by little over 20% compared to 2020. (Website of Visit Britain 2021.) Despite the lowered revenue that the tourism industry will bring due to the lowered volume of visitors, the government has already started to plan the future recovery of the tourism industry. With the first step already taken to support small tourism businesses with grants to get back on their feet and adapt their business to the new situation. (Ministry of Housing et al. 2020.)

5.2 Covid-19 restrictions in the UK

The first cases of Covid-19 started to appear within the United Kingdom during the beginning of 2020 (Department of Health and Social Care 2020). By March 2020, the cases had increased to numbers that could not be ignored and if left unchecked it was assumed that the situation would have escalated even further. Thus, like many other nations at the time, UK announced travel and social distancing restrictions in the form of a national lockdown. Meant to last only a short period, the situation in Europe and in the UK escalated quickly by cases rising to unexpected numbers. Due to this, the government chose to continue the lockdown, which meant restrictions on movement, business, and social interaction, until further notice. (Prime Minister's Office 2020a.)

The first lockdown meant drastic closures for tourism businesses. Especially in the case of accommodation. Most hotels, hostels and other accommodations were forced to close unless providing a service for essential workers. For small holiday rentals this meant the loss of revenue for a long period of time. However, with the exception that some accommodation let owners took, which was to rent out holiday cottages and houses to longer term tenants for the duration of the lockdown (Nelson, personal communication on 1.3.2021). As we can see from this benefit, some smaller holiday lets were able to survive until the businesses could open for the first-time during summer 2020.

The restrictions of the first lockdown continued until late June when the government announced easing of restrictions starting from July due to decreasing case numbers and to boost the declined economy (Prime Minister’s Office 2020b). The lifts meant that from the 23rd of June onwards accommodation businesses could start reopening and offering services (Institute for Government analysis 2021). Though, businesses relying on events or providing bigger spaces for accommodation still struggled as restrictions on for example weddings were still in place (Nelson, personal communication on 1.3.2021).

These restriction lifts continued further into autumn despite steadily increasing case numbers as the late autumn approached. The case numbers continued to climb until the UK started to reach numbers of over 10 000 cases a day. Thus, forcing the Prime Minister to announce new restrictions in the form of a three-tier system, which started to be implemented at the end of September 2020. Tier system meant that a county within the UK was based in a certain tier with either low, medium, or high restrictions depending on their Covid-19 case numbers and hospital admissions. This meant that neighbouring counties could be placed in different tiers, with one allowed to keep shops and restaurants open and the other not. (Prime Minister's Office 2020c.) The tier system unfortunately did not manage to decrease the rising cases in most areas (Scally 2020) and thus at the end of October 2020 the UK entered its second full lockdown (Covid-19: PM…2020) that would end up lasting through Christmas (Christmas rules…2020) and extended into a third lockdown lasting until late spring 2021 (Covid: England’s third…2021).

Based on the restrictions most tourism companies, especially accommodation focused companies, were able to remain open during the summer months of July and August (Prime Minister’s Office 2020b). With some able to remain open through the tier systems depending on the tier they were placed in (Prime Minister's Office 2020c). However, the tiers and lockdown restrictions were not clear to many (Murphy & Bland 2020). They came with the extreme difficulty of determining what businesses were deemed more essential over others, with changes being made every two weeks. The confusion and complication on this came from classifications of providing service for essential workers. These are for example teachers, nurses, and doctors. A hotel, Airbnb or private holiday let could remain open if it was providing accommodation for essential workers. (Cabinet Office 2020.) Unfortunately, this also restricted what support you could ask from the government due to the lockdowns (Department for Business et al. 2020). The entrepreneurs and workers within the tourism industry in the UK were able apply for financial support with a maximum of £2500 a month during most of the lockdowns (Williams 2020, 79).

The restrictions continued within the UK in 2021 with a plan for restrictions to be eased on the 12th of April 2021 in England with Wales opening earlier and Scotland following later in the spring. The plans for lifting of restrictions were constantly under review and subject to change, making it hard to estimate the recovery schedule and full impact on many businesses. (Cabinet Office 2021a.) What can already be gathered from the losses due to restrictions is the loss of tourism industry jobs. The overall loss to jobs within the tourism sector has been estimated to be up to 18% in the United Kingdom (Partridge 2020).

5.3 Predictions for UK tourism

What does bring many tourism businesses hope, in addition with the easing of restrictions in spring 2021, is the expected rise in domestic tourism (Joyner 2021). Holidays known as staycations, meaning that the holiday is taken within a traveller’s own country or local area, have been gaining popularity (Joyner 2021) due to the announcement of an international travel ban for recreational purposes made by the government. At the time of writing this in April 2021 the UK government and law states that international travel for holiday purposes is illegal and people participating in it can face substantial fines. (Cabinet Office 2021b.)

From small holiday cottages to holiday parks, many have announced and predicted the boom of domestic tourism bookings and enquiries for the upcoming summer of 2021 (Joyner 2021). This is further encouraged by the governments decision on the 12th of April 2021 to allow self-contained accommodation to open and allow customers from the same household to stay overnight outside their homes (UK holidays: When… 2021). The domestic tourism boom is predicted due to last summer's great success for many businesses after restrictions were lifted in June and July 2020. The restrictions on international travel attracted tourists to focus on domestic traveling instead. The same behaviour is expected for 2021. (Joyner 2021) Positive effects are not only due to the previously mentioned aspects but also related to the financial aspects of vacationing domestically. With many more focused on their finances after the pandemic, domestic traveling and staycations offering a cheaper option to expenses faced while traveling abroad. (Schofields 2020, UK domestic tourism boom… 2021.)

According to Joyner (2021) the boom of domestic tourism in 2021 bodes well not only for the small accommodation and tourism business but also for the UK economy. This is due to the tourism revenue and spending remaining within the UK and being reinvested into the local communities and areas. With this prediction of the tourism market, the unemployment in the tourism industry might bounce back as well from the tough year of 2020. However, the predictions for 2021 success for the domestic tourism industry also bid a warning for the year 2022 as it might be difficult to maintain the success of numbers due to foreign travel becoming available. The domestic tourism industry within the UK, while helping to recover from Covid-19 initially is also down in numbers and revenue compared to the year before the pandemic in 2019 (UK tourism spending…2021). Thus, tourism businesses need to focus on creating the experiences and interest for tourists to be encouraged to visit more than just once in a destination or to prefer traveling within their home country (Joyner 2021).

What needs to be kept in mind, however, is that despite the pandemic encouraging and giving an opportunity for the boom in domestic tourism, the interest towards domestic tourism has kept rising in the previous years. In just 2019 people who chose to purely travel domestically within the UK was 8% higher to those choosing purely to travel abroad. The domestic tourism trend also goes hand in hand with the trend of staying in self-catering accommodations over all-inclusive hotels. However, with still only 19% of UK holidays being taken in self-catering accommodation in 2019 there is a lot of climbing to do. (Schofields 2020.)

6 TOURISM CRISIS MANAGEMENT

The tourism industry is not unfamiliar when it comes to experiencing crisis events (Gössling et al. 2020). A crisis includes any non-predictable events that have negative impacts on the area, industries, and the people (Fotiadis, Polyzos & Tzung-Cheng 2021, 2). A crisis is also often used to describe situations where an industry or business was not prepared for an unexpected issue or an event (Smart, Ma, Qu & Ding 2021, 2). This definition can be fitting for the Covid-19 pandemic as many businesses faced a crisis due to systems and practises being outdated and old fashioned for the adaptability needed (Website of Business Gateway 2021). Crises share similar characteristics no matter the era or event: abruptness, time compression or insecurity (Stafford, Yu & Armoo 2002, 294).

Since the start of major tourism in the 1950's (Gössling et al. 2020) and according to Mansfel and Pizam (2011), tourism has become a target and a vulnerable industry for crises be it nature, political, disease or manmade (Collins-Kreiner & Ram 2020). All of these can have a huge effect on a tourism destinations image, tourist behaviour and the revenue it generates (Fotiadis et al. 2021, 23). Therefore, the importance of being aware of the vulnerability of the tourism industry to crises is important for any destination (Mansfeld & Pizam 2011, 4). In addition to this, crisis management is needed to rehabilitate and maintain a destinations success and reputation (Scaglione 2006, 13). Crisis management is used by implementing and creating processes to lessen the impact and effect of crises and in some cases help in their prevention (Smart, Ma, Qu & Ding 2021, 23). Now more than ever the emphasis of travel is on safety and security (Tarlow 2006, 46). Not just that but from previous experiences and already existing or predicted plans, destinations and tourism companies can learn how to get back on track after a crisis to make sure they recover quickly and efficiently (Beirman 2006, 266–267).

With the history and vulnerability for crises in the tourism industry, recovery plans become important in the restoring of the industry and its image (Kukanja, Planinc & Sikošek 2020, 349). This will be the case when it comes to the Covid-19 pandemic. However, since the industry has never experienced a crisis of a similar scale before, the plan for recovery can prove to be difficult to create (Strielkowski 2020). The Foot and Mouth disease and the severe acute respiratory syndrome (SARS) both had great impacts on tourism in the countries affected, similarly with the current pandemic. However, as can be seen by the global reach of the current pandemic, the impact is much greater. (Bas & Sivaprasad 2021, 6.)

Bas and Sivaprasad (2021) talk about important lessons of crisis recovery and management in the UK concerning old and new crises. The main focus is on preparedness and acknowledgement of the risks involved in the tourism industry. This can help stakeholders to recover with efficiency during times of crisis. With keeping in mind good crisis management and recovery practises. By looking at previous crisis recovery strategies implemented in destinations around the world we can learn common attributes and factors that are useful no matter the scale of the crisis (Kukanja et al. 2020, 358). With a combination of Covid-19 recovery strategy predictions from previous research, there will be a base theory for this study's recovery strategy suggestions.

6.1 Recovery strategies

With all the past crises that the tourism industry has experienced, recovery strategies keep developing to help the industry recover quickly (Fotiadis et al. 2021, 2). Recovery strategies are often implemented in the post-crisis stage of tourism crisis management. Steps for recovery will always depend on the scale of the crisis at hand and the changes experienced in tourism behaviour or industry development for example. (Beirman 2006, 336.) The following chapter will look at the previous disease outbreaks that have shook the tourism industry in the 21st century (Strielkowski 2020). The following outbreaks, although not as devastating or long lasting as the current Covid-19 pandemic, can give us insight on the previous experiences and resilience of the tourism industry in responding to these outbreaks. (Fotiadis et al. 2021, 12.)

The severe acute respiratory syndrome known as SARS, affected the tourism industry from 2002 to 2003 (Henderson 2007, 119). SARS originated from China but only managed to spread to a few countries. These being mainly China, Canada, Hong Kong and Vietnam. Despite the virus being proven to be less fatal and contagious than thought, it spread worldwide media panic and travel restriction were placed especially in Toronto, Canada. Despite the short span of the SARS outbreak, already ending in 2003, many countries with only a few cases, suffered with closures and restrictions taking place in the tourism and travel industries. The recovery process for the destinations affected started with the lift of travel restrictions and government advisories. Despite these, tourists were reluctant to return, thus demanding for further marketing actions. Marketing towards safety, reassurance and recovery was aimed towards tourists to assure them of the safety precautions taken by the destinations. (Henderson 2007, 119.) In the end, the marketing and safety measures of destinations paid off with tourism slowly returning at the end of 2003 (Fotiadis et al. 2021, 2).

The second example of a disease outbreak is the animal affecting Foot and Mouth disease that affected the rural tourism within England and Scotland in 2001–2002 (Irwine & Anderson 2006, 170). The Foot and Mouth disease mainly affects livestock with limited effect on humans even if infected (Henderson 2007, 110). Irwine and Anderson (2006) conclude that despite this, when the outbreak started, along with agriculture, the tourism industry saw a huge decline with a few main areas for rural tourism seeing complete closure. Those areas were the region of Grampian in Scotland and Cumbria within England. Both of them experienced loss of tourism after the outbreak with closures of business and restricted movement in the area. The area of Cumbria in England however, never experienced a single case of Foot and Mouth disease but due to being a rural destination suffered the association with the disease and thus experiencing loses in the tourism industry in 2001.

In the post-epidemic stage, the two regions both started to rebuild and recover the tourism industry. Help came also from the government and local councils, who helped to start up the industry with supportive funding. Once more, the recovery focus especially in England was on marketing. The main aim was to assure the tourists that travelling was safe and the destination was fully prepared and recovered. (Irwine & Anderson 2006, 177.) Unfortunately, even though the region in Scotland was able to recover from the outbreak, the region in England experienced great losses in jobs, arrivals, and businesses years after the outbreak (Hall 2006.)

We can also take note from crises that are different but at the same time affect the tourism industry stakeholders. What changed the tourism industries future crisis management greatly was the 2001 September 11th terrorist attack in the United States (Stafford et al. 2002, 291). The accommodation industry within Washington DC put great effort into their crisis management and into their recovery. Stafford, Yu, and Armoo (2002) based on these efforts created suggestions that could be used in future crisis recoveries and by different industries. The two main points focus on preparations and management of industry stakeholders when it comes to crises and co-operation between these stakeholders during and in the aftermath of a crisis. How the accommodation industry in Washington DC completed these aims was through reassurance that the destination was safe, campaigns to promote re-opening and reworking on their destination image. With simple efforts and perseverance, the destination managed to open its attractions and receive governmental support, while focusing on the target group for their marketing efforts to achieve most success.

With examples of recovery plans from different destinations, their experience and research give us guidance on future crises like Covid-19. The plans allow for strategies to form and research to be built in order to prepare for when recovery stages can begin. (Yeh 2020.) Many of the crisis recovery plans used in the past, follow similar recommendations that are easy to adjust to one area, industry or even a group of companies (Stafford et al. 2002, 291). With this previous research at hand, many researchers, tourism organizations and commissions have started to predict and speculate the possibilities of post-Covid-19 tourism industry and the stages to get to it. (Yeh 2020.)

6.2 Covid-19 recovery strategy predictions

Despite the pandemic not seeing its end days and the full impacts being unknown, research is already focusing on the possible recovery strategies and post-Covid-19 recovery for many industries. Multiple countries and destinations have gathered expectations of the losses they will face and how the next years for the tourism industry might look like in addition with what strategies are best to implement for a full recovery. (Collins-Kreiner & Ram 2020.)

Collins-Kreined and Ram (2020) state that even with research guessing and estimating the recovery of tourism in the post-Covid world, most do not consider previous crisis management theories or recovery strategies. Before looking at the few emerging options for Covid-19 recovery, acknowledging the scale of Covid-19 compared to previous disease outbreaks needs to be considered (Collins-Kreiner & Ram 2020). The SARS outbreak only concluded to less than 1% loss of global tourism development in the end (Gössling et al. 2020). While Covid-19 has been estimated for a loss of arrivals of over 98% in the UK alone (Website of the Office for National Statistics 2021). With the expected global loss being around 20–30% (Lapointe 2020).

Many destinations have also realised the importance of crisis management and being prepared now more than ever. Thus, in many of the recovery strategies, one stage that is brough up is planning for the future. The tourism businesses do not want to be unprepared for what the future has to offer, and new development is under way. (OECD 2020, 7; Website of World Travel and Tourism Council 2021.)

The pandemic has also changed the tourism industry from the customer behaviour point of view. Travellers have changed their points of view when it comes to their travel choices due to the pandemic. (OECD 2020, 6.) In a study done by Gursoy, Chi and Chi (2020) findings revealed that travellers who faced stay-at-home orders are reluctant to stay at hotels or travel to a destination straight away. Most travellers want to see the safety and security measures during their visit to make them feel more comfortable about travelling (Gursoy & Chi 2020, 527–528).

Safety when it comes to cleaning is not the only traveller behaviour that has changed due to the pandemic. Many travellers are even unwilling to travel before vaccinations in the destinations has become more widely available. (Gursoy, Chi, & Chi 2020, 10; Gursoy & Chi 2020, 527528.) When people are ready to travel, what kind of travel they prefer has also undergone a change (Gursoy et al. 2020, 15−16). People have put more emphasis on travelling locally and domestically with a focus on the outdoors and nature. Peace and quiet with activities outdoors have replaced the busy city centre holidays. (Gerwe 2021, 6; European Travel Commission 2020, 8.)

A forgotten part of tourism crisis recovery is that after a crisis, domestic tourism is often the first to recover. Domestic tourism, even though not the main market in many destinations can offer the first steps for recovery after a crisis, in a safe way. (Woyo 2021, 477–478.) Due to the unavoidable decline of international tourism even during the recovery stages of Covid-19 (Lapointe 2020), focus on domestic tourism should be the first priority. In the UK, domestic tourism is also expected to already recover to pre-pandemic numbers by 2022 while international tourism is not expected to recover before 2023 (Marketing Manchester 2020). Other studies focusing on Covid-19 recovery strategies also acknowledge the lack of research and focus on considering the importance of domestic tourism when focusing on recovery and its possibility to quicken the rehabilitation of the tourism industry in a destination (Fotiadis et al. 2020, 12−13).

In the United Kingdom and globally, tourism organizations have started to publish their plans for tourism recovery for the shorter and longer term. In many of them, domestic tourism plays an important part to help the industry back on its feet. (OECD 2020, 4,6; UNWTO 2021.) Visit Britain has predicted that domestic tourism is going to benefit the most in the post-pandemic recovery stage due to people preferring to stay local (OECD 2020, 6). As stated by Gerwe (2021), restrictions and awareness of safety while traveling will most likely have an effect on travel behaviour in the upcoming years while travel resumes back to normal. For 2021, with international travel still facing restrictions, people have resulted into staycations in self-contained accommodation.

With domestic tourism, what needs to be kept in mind that even with high numbers, the industry of an international destination will not fully recover. Domestic tourists often have a much lower spending pattern compared to international tourists. (OECD 2020, 6.) Thus, domestic tourism for a country relying on international visitors does not offer a path to full recovery (UNWTO 2021). However, the Organisation for Economic Co-operation and Development (OECD) (2020) states that domestic tourism offers a start for the industry and a boost to the economy while helping to set the stage for the return of international travel.

Gloucestershire was one of the first destinations in the UK to publish a recovery plan for their tourism market (O'Carroll 2021). Many counties and destinations started to follow suit. The aim of the campaigns is focused more on gaining tourists' confidence and trust in the tourism industry back. For many small destinations, the aim in 2021 is to reap in the success of the boom of domestic tourism. Yet, what unifies these campaigns is the factor of continuing governmental support, focus on confidence and trust building in marketing and reinvention. (Website of Welcome to Yorkshire 2021, O'Carroll 2021.) The reinvention of new technology, safety, contactless services and activities is adapted from the new traveller behaviour mentioned previously (Gursoy et al. 2020, 13,17). The reinvention has also moved more towards a sustainable side of tourism development.

The sustainability mentioned above goes hand in hand with another developing recovery theory, the resilience theory. Resilience when it comes to crisis management and recovery focuses on businesses being able to adapt to the changes that the crisis has created. (Woyo 2021, 478.) This can be easily connected to the recovery theories focusing on reforming of the tourism industry through new development (Lew, Cheer, Haywood, Brouder & Salazar 2020). Many researchers believe that mass international tourism is about to change, with even more focus on sustainability and locality. Privacy, safety, and distance are also other aspects part of this theory's prediction. (Lew et al. 2020; Lapointe 2020.)

The United Kingdom is predicting that the pandemic has brought the focus of people towards sustainability even more when it comes to travelling. Local travel, self-contained accommodation and different transportation methods are the focus of recovery for the tourism industry (Gerwe 2021, 35; OECD 2020, 6). Other researchers and destinations are following suit and recognising the importance of sustainable and resilient new development for the future of tourism (OECD 2020, 1). Sustainability and resilience development for the industry is not only to surely lessen the carbon footprint of travel but also to develop more flexible and adaptable systems for the industry (UNWTO 2021). What Covid-19 has taught for many businesses is that the lack of quick adaptability and flexibility in their systems can cause severe losses. Thus, many businesses have now chosen to focus on developing their digital systems, contactless services and new experiences. (OECD 2020, 6.)

The new resilience solutions are meant to help the tourism industry recover in the short term but to also provide help in learning from the pandemic for future development. Many businesses have realised the gaps in services, flexibility, and co-operation due to the pandemic and now it is time to focus on developing them. (UNWTO 2021.) Especially international and governmental co-operation is needed to further support the industry and are essential parts of reopening. Furthermore, realising the gaps between the provided service and customer expectations with safety have also encouraged the use of technology in more parts of the service experience. (OECD 2020, 2.) Even the International Economic Cooperation of G20 acknowledged in their 2020 plan for tourism recovery the importance of resilience, new sustainable development and the new direction that the tourism industry should take (Website of World Travel and Tourism Council 2021).

One of the emerging theories that we can already see glimpses of happening focuses on the recovery of the tourism industry through immunity (Fotiadis et al. 2020, 12). The theory presents the options of people who have immunity to Covid-19 either through previous infection or vaccination, being allowed to travel post-Covid-19 to help maintain the safety and slowly recover the tourism industry (Strielkowski 2020). The theory even though written in 2020 before the announcement of the vaccine rollouts is not too far off the current expected tourism recovery plans for many destinations (Fox 2020). With the vaccinations rolling in many countries, for example the UK, multiple EU and other destinations have announced their willingness to allow visitors that have been fully vaccinated to travel and visit (Covid-19: Cyprus and…2021).

Within the United Kingdom the idea and effect of the immunity theory and recovery can be seen already. The slow easing of restrictions and opening of the tourism industry has previously resulted in a surge of cases. (Triggle 2020.) The vaccine rollout currently as of 24th of May 2021, has exceeded over 37 million people with the first dose and 22 million with both doses (Website of the United Kingdom Government 2021). Scientists have also predicted that the UK has reached herd immunity for Covid-19 in April 2021. Herd immunity against Covid-19 simply means that the immunity threshold of people has reached a point where the spread of the infections cannot reach mass numbers as seen before. (COVID-19: UK set to … 2021.) There is still room for uncertainty for many industries. The Covid-19 variants would cause a setback in the herd immunity and thus the possibilities of further restrictions being introduced on a later date is not out of the question. (COVID-19: UK set to … 2021.) Thus, the tourism industry still faces uncertainty for a full recovery with just relying on the immunity theory in 2021 (Triggle 2021).

It is still too early to be certain what theories for recovery will end up being implemented at destinations (Lew et al. 2020). Most likely, a mix of theories would be needed to fully recover from a crisis like Covid-19. What can be determined however, is the need for governmental support in the recovery process. (Yeh 2020.) Many recovery plans have recognised that recovery may be impossible for them without the continuing financial support and clarity when it comes to restriction lifts and co-operation internationally between countries (Website of World Travel and Tourism Council 2021).

7 CASE STUDY METHOD

The case study research approach is useful in studies where looking at a phenomenon in detail is needed or gathering in-depth information from a case company takes place. Rather than focusing on purely the phenomena itself, a case study focuses more on the aspect of the impact, affect and reactions to a phenomenon. (Papachroni & Lochrie

2015, 80–81.) As Yin (2003) states, case studies focus on the questions of why and how. Case studies also do not require controlling behaviour or events being studied. Case studies can take the focus of multiple points of view or just one point of view, for example a case company or group. The case study method was chosen for this study, based on case studies being used to gather detailed information and understanding of a case company's reaction to a phenomenon. (Yin 2003, 5.) With another use for case studies is to usually gather this data and use it to create something beneficial, be it a new theory or a practical company aspect. During this study, a case company of White Feather and its business customer companies was used to gather information about their reaction to the Covid-19 restrictions in order to generate recovery strategy suggestions for post-Covid-19 operations. (Papachroni & Lochrie 2015, 80–81.)

The study in question focuses on an illustrative and pragmatic case study approach. The illustrative approach focuses on choosing a specific case company due to its position for the study while the pragmatic approach stands for an opportunity to work with a specific company (Veal 2018, 403). Case study approach is often used in the field of tourism due to its flexibility (Veal 2018, 402) with methods and its ability to answer questions about complex links between contents (Beeton 2005, 57). According to Beeton (2005), case studies have been described as empirical examinations that look into a specific phenomenon for example from a company's point of view. They are well suited for research that focuses on a phenomenon that's effects are still unknown or not fully clear. This makes it a good option when it comes to studying the Covid-19 restrictions and their implications for the tourism industry from a company's point of view.

Case study research is suggested to be used with multiple methods to tackle the issue of producing a study that could be seen as bias (Beeton 2005, 56). Therefore, mixed data collection methods were chosen for this study to improve the validity and reliability of the research results. Mixed methods include using both qualitative and quantitative methods to gather data within a single study (Greene, Caracelli & Graham 1989). Qualitative research methods focus on gathering data that is information rich (Veal 2017, 278) with a purpose of looking deeper into the meaning behind your data (University of Jyväskylä: Qualitative research, Koppa 2010). Quantitative research methods on the other hand focus on gathering larger numbers of data that can be presented statistically (University of Jyväskylä: Quantitative research, Koppa 2010).

Greene, Caracelli and Graham (1989) state that the use of mixed methods can help with gathering more data, improve validity of the study in addition to providing data from multiple different perspectives. Combining the qualitative data collection from the interviews with quantitative data gathered from accommodation owners through a survey, creates a better understanding of the experienced implications of Covid-19 restrictions from different viewpoints.

The data gathering happened separately and the conversion of these two methods happened during the results analysis phase. Creswell and Plano Clark (2011) call this method of mixing the convergent parallel design as seen in the Figure 2 below. This means that the two different data are to be interpreted after both have been collected and analysed separately.

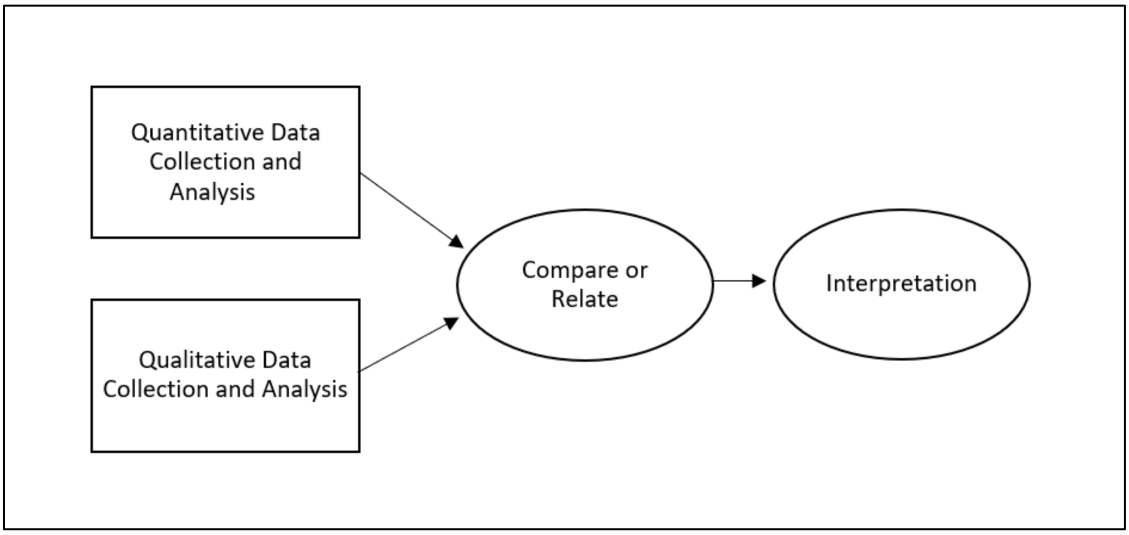


Figure 2. Prototypical Versions of the Six Major Mixed Methods Research Designs. The convergent parallel design. (Creswell & Plano Clark 2011, 69)

In this study, the quantitative and qualitative data were compared to each other to find out connecting factors and matching the occurring views within the answers. Creswell and Plano Clark (2011) design of mixed methods mean that both methods are used and prioritised equally within the study. The convergent parallel design has also been called triangulation which it is referred to as later in this study. Triangulation method and its design was chosen due to its common use in research since the 70's. The design is also well suited when wanting to bring the different methods strengths together in order to develop a wider understanding of the study's phenomena.

7.1 Data collection and analysis

The studies empirical data was gathered using two different methods, a survey as the quantitative method and in depth semi-structured interviews for the qualitative. A questionnaire survey was chosen as support for the qualitative methods due to its advantages in gathering larger numbers of data, usability with online methods (Nardi 2018, 16) and to gather information about opinions and views on how the restrictions have showed on their business. A survey usually includes a questionnaire that asks the decided sample questions about a certain topic either in open-ended or close-ended questions (Adams 2013, 118, 124). For this study, a mix of open-ended and close-ended questions was included due to the restrictions and safety from Covid-19 taken into consideration, thus resulting in less face-to-face opportunities to gather data. Nardi (2018) and Adams (2013) acknowledge that surveys present issues with low response rate, differences between actions and answers and misunderstanding possibilities. Thus, it is important to pair the survey with qualitative methods which in this case gather the detailed and deep information through in-depth interviews.

Due to the study using the triangulation method of mixing data collection methods, the analysis includes content analysis used for qualitative and parts of the quantitative data. Traditional content analysis is known for being used with quantitative methods (Kohlbacher 2006, 12) however qualitative content analysis has gained popularity especially in case study research (Hall & Valentin 2005, 239). Analysing the data content from both aspects can help close the gaps in information and have the quantitative statistical side support the qualitative information of understanding the effects of Covid-19 restrictions. After the analysis, the combination of these findings was used to create the end research results.

For quantitative surveys open-ended questions, using content analysis is fitting option due to its focus on analysing text (Kohlbacher 2006, 11). Additionally, with content analysis on the open-ended questions, closed-ended questions were first analysed using the mean, median and mode method. This gives an idea of the provided answers and what are the companies' general views on the restrictions, recovery and development. Consequently, giving us a good way to compare it with the textual data views from interviews and the open-ended questions. (Website of Business Research Methodology 2021.) Thus, the main aim is to analyse if the survey answers together with the qualitative interview provide the factors to how the Covid-19 restrictions have shown, what views on overall tourism in the area there are and what opinions and ideas are on the recovery of the industry and if they are similar between the companies. Quantitative content analysis, however, does lack in term of looking into the individuality of the material, missing factors from the text and well as the context of the text (Kohlbacher 2006, 13), qualitative content analysis fills in the missing gap and increasing the validity of the analysis (Hall & Valentin 2005, 239).

Qualitative content analysis starts just as a classical content analysis would by investigating the occurring themes and words within your gathered data (Adams, Khan & Raeside 2014, 159). In the case of this study, that looked into the themes appearing within the interview transcriptions. Though, the qualitative content analysis does differ from the classical more quantitative version by providing a theory-guided approach. Simply meaning that other research theory is used to help analyse the material and increase the validity of the results concluded from the analysis (Kohlbacher 2006, 13). For this study, the theory focused on current research case examples of similar situations around the world when it comes to reacting to the impact of Covid-19 especially in the accommodation sector of tourism.

The content analysis was conducted with guiding steps from Adams et al. (2013) and Kohlbacher (2006). Adams et al. (2013) follows the qualitative content analysis six steps, starting with identifying the unit which is the case company and categorising the issues to illustrating them and providing a summary of the findings, analysis of the interviews was completed and combined with the quantitative in the results. The study followed these steps with the help of Mayring's model of three factors for analysis: summarizing so that essential content remains, explaining the material and analysing the context and finally forming the results into a desired format (Kohlbacher 2006, 17). To summarise the full implementation, quantitative analysis and data provides a statistical measurement of how many companies have reacted to Covid-19 restrictions while the qualitative analysis and data goes further into the how and why.

7.1.1 Interviews

For this study, the use of in-depth interviews allows for deeper answering while also being able to collect all the important information needed. In-depth qualitative interviews take a longer time to conduct and analyse, are less structured and do not usually involve ready-made questions and answers. In addition, they go deeper into the research topic at hand (Adams et al. 2013, 144; Veal 2017, 287). Interviews are well suited for situations where the sampling is small enough to conduct them (Veal 2018, 288). They provide advantages in asking for more detailed information, clarifying opportunities and unexpected information (Nardi 2018, 16).

The property owners interviewed for the research are already pre-determined through the commissioner. The interviews aim to gather detailed data and information about the current state of the companies. This is done through forming the questions based on three different categories: Covid-19 restrictions and their impact, the tourism industry in the area and the recovery hopes, ideas, and development. The questions aim to also gather information about the resource restrictions of recovery for the tourism after Covid-19 as this is an important factor to establishing later recovery strategy suggestions.

In-depth interviews often do not include ready-made questions (Adams et al. 2013, 144; Veal 2017, 287), however in this study the use of open-ended questions is used with specific themes in mind. The themes focus on pre-Covid-19 tourism in the area, impacts of Covid-19 restrictions and finally recovery. The themes were formed with the help of gathering previous information from locals and White Feather employees about the current situation and views and opinions on the recovery. While keeping in mind the constant development of restriction changes within the UK during spring of 2021 and their effect on the tourism industry. Based on the exploratory data and testing gathered to form the interview questions, the qualitative interview is formed of 15 guiding questions based on the themes. What needs to be kept in mind, is that the interviewees differ slightly with the business structures and stages, thus the guiding questions can receive different formats depending on the interview held.

7.1.2 Survey

The commissioner, White Feather, helps to manage other properties owned by different small entrepreneurs, which were all asked to partake in the research. The entrepreneurs who took part in the quantitative survey helped establish the effect that Covid-19 has had on their business, properties, development, and revenue. The participant group of the survey, in addition with interviews, provided a large enough sampling for the small area of the Wye Valley to gather sufficient data, to provide suggestions for possible recovery strategies. The sampling of entrepreneurs could also be considered random as the entrepreneurs are not chosen due to specific requirements other than owning an accommodation business within the Wye Valley region. The aim of the study is also to not fully generalize the implications of Covid-19 on accommodation businesses but to create a suitable recovery strategy for the commissioner that could be implemented by the other accommodation properties as well.

The property owners were contacted through email and provided a Google Form based survey. This provided an opportunity for the participants to answer online, thus avoiding scheduling difficulties and giving a longer answering time as a possibility. Questionnaires sent via email can also be considered highly accessible to all participants (Pecáková 2016, 13). Online questionnaires however, often present the problem of low response rates. These can be due to lack of time or interest and lack of trust to click the link to take a survey. (Pecáková 2016, 13−14.) For this study, the email was sent to participants through the company email they are familiar with communicating from and was preceded by a previous email advising about a future survey. This way the lack of trust and worry can be advised and used in trying to gain the participants notice and interest towards the survey. That is why it was chosen to add open-ended questions along with closed ones within the same survey.

Open-ended questions despite their issues with lower answer percentage provide advantages in surveys when combined with close-ended questions. Answerers are often more encouraged to provide a vast set of different answers. This can result in gathering a lot of missing data otherwise not accessed with just close-ended questions. Close-ended questions by themselves also pose the issue of questions offering specific suggestions of answers and thus increasing the possibility of bias. (Reja, Manfreda, Hlebec & Vehovar 2003, 159.) However, as Reja et al. (2003) state, open-ended questions require clear wording leaving no room for questioning.

The survey questions were created in guidance with exploratory data gathered from personal communication with the locals in Wye Valley along with the case company. With help from the feedback achieved in the testing phase of the survey. The beginning of the questionnaire asks basic questions from the holiday let name to how many years they have been in business. Furthermore, the questionnaire remains anonymous and does not include any names or information of the owners themselves.

The questions are divided into three different themes, impact and view on Covid-19 restrictions, overall tourism view of the area with the final one being ideas and opinions on development and recovery of the entrepreneur tourism companies themselves. The questionnaire answers are given in the form of a Likert-type scale, multiple choice and yes and no answers with open-ended questions mixed in between.

The questions within the survey are classified as a Likert-type scale compared to a full Likert scale due to only the scale being used to answer single questions compared statements that try to describe larger elements of a subject. (Boone Jr & Boone 2012.) Likert-type scale questions are also classified as containing ordinal data, this means that the answers provided can be ranked or organised (Allen & Seaman 2007). This is classified as according to the Steven’s Scale of Measurement which has four categories: interval, nominal, ordinal and ratio as explained by Boone Jr and Boone (2012). The authors further explain that due to the nature of Likert-type scale questions mean, median and mode methods should be used as a descriptive statistical analysis.

Croasmun and Ostrom (2011) explain that Likert-type scales are especially efficient when looking at data gathering that focuses on determining attitude-based answers.

Thus, fitting when looking at the views and opinions on the Covid-19 restrictions and future recovery and development. The Likert-type scale in use in this study is a 5-item scale as recommended by Croasmun and Ostrom (2011) and ranged from different types of agree and disagree answers along with a neutral or do not know as the middle number three option. As seen in Appendix 1, the survey questions form a mix of information gathering about the participants property or business, views on restrictions, development and recovery for the future. The property information and operation during the year 2020 can provide data on the properties possible resources if operation is continuing from pre-pandemic until spring 2021.

While gathering data using a survey questionnaire method, validity can be increase by ensuring the consistency of answers provided. In a Likert-type scale-based questionnaire this is done using a Cronbach's alpha number which measures the internal consistency of the answers. (Croasmun & Ostrom 2011, 20.) Hinton, Brownlow, McMurray and Cozens (2004) state number above 0.7 is considered as reliable according to the Cronbach's alpha however an above 0.5 is still reliable in a moderate scale. Having a Likert-type scale with a neutral option included helps answerers to not pick an answer because they are forced to and thus can help decrease response bias within the survey. The survey also included another method to increase its validity, switching between positive and negatively worded questions and statements. This method forces the answerers to pay attention to the questions and statements and engages them in a more cognitive matter. (Croasmun & Ostrom 2011, 20.)

For the close-ended questions of a survey, the mean, median and mode method was used to analyse it. As described by Sullivan and Artino (2013), parametric analysis tests which the mean, median and mode fall under, are adequate to use with Likert-type scale and survey research in cases where the data is well distributed. This means that the data does not reveal extreme high or low answers on the designated scale. The mean is used to determine the average answer among the sampling by calculating together the results and dividing it by the number of total questionnaires answered. Median value of a question is calculated through organization of the numerical answers in order and determining the middle value. The mode can be determined on a question based on the answer that is the most prominent. More than one mode can appear within a questions data. (Website of Business Research Methodology 2021.)

The data analysed consists of the three main themes for the survey as mentioned before, Covid-19 restrictions, general tourism of the area, development and recovery. The method chosen thus identifies the answers and opinions appearing the most within different questions (Sullivan & Artino 2013, 541−542). This gives an idea of how the entrepreneurs have felt about the restrictions, how many have implemented new development due to the pandemic and how they view the recovery of tourism in their area. Since, the mean, median and mode give indications on the most common answer occurring in the data (Sullivan & Artino 2013, 541−542), it is easy to see if the general impact of the restrictions, the profit and loss and well as views towards recovery were positive or negative.

8 RESEARCH RESULTS AND ANALYSIS

The following research results and analysis were conducted from the qualitative interviews as well the survey, which were collected throughout July and August 2021. In total five qualitative interviews were conducted with tourism accommodation owners from the area and another 22 accommodation owners took part in the survey. The data collection focused on tourism accommodation property owners in the Wye Valley area that have experienced the effects of the Covid-19 restrictions in the UK first-hand. The aim is to look into the business's views on the restrictions and at their aims of recovery looking into the end of 2021 and onwards. Due to the constant changes to the Covid-19 restrictions and situation some views and data may have changed. However, the results focus on the data from August 2021 and before.

The property owners were contacted for interviews due to their experience in the tourism industry, business and marketing, the suggestions for the properties were made by White Feather. Several had been in business for a long time as property owners with only one property being new to the accommodation industry, however, having years of experience in marketing to provide expertise to the interviews in terms of recovery suggestions. Anonymity was requested throughout the starting of the interview planning process, thus the property owners and their businesses, not including the interview with White Feather, is referred within the results as Property 1 to 4 as seen in Table 1. For the survey process, the survey want sent to all other property owners that were customers of White Feather and had not taken part in the interviews. The experience with owning a property also remained similar with over 60% of participants owning the property for more than 2 years, with over 40% of the number being more than 5 years.

Table 1. Qualitative interviewee's qualifications and experience 2021

Interviewee	Occupation	Experience in the industry	Experience as a property owner
Property 1 (P^1)	Accommodation business owner	7 years	6 years
Property 2 (P^2)	Accommodation business owner and event manager	8 years	6 years
Property 3 (P^3)	Accommodation business owner and Marketing consultant	8 years	1,5 years
Property 4 (P^4)	Accommodation business owner and Marketing manager	10 years	5 years
White Feather Employee	Customer experience and communication manager	5 years	Not applicable

All interviews lasted between 35 to 50 minutes with the guiding questions remaining the same, however some interviews required less use of the guiding questions as the interviewee's conversation flowed smoothly through the topics. With free conversation allowed, some interviews provided deeper and in detail information about the property's finances and profit and loss statements. The deeper information also provided insight onto the survey answers especially on the crisis management and confidence over future crisis management. This information revealed a further gap and need for recovery suggestions that can be adapted into crisis management plans for the property owners and White Feather.

The survey was available for the property owners for a period of four weeks. Before the survey, an introduction email was sent by White Feather, informing of the oncoming survey, the anonymity and contents. A week later the survey was sent over followed by a reminder a week before the survey closed in August. Most survey answers were received within the final week of availability, after the reminder was sent out. The survey answers were then extracted and divided into open-ended and close ended questions to be analysed further.

The interviews were transcribed, coded and analysed using the content analysis method introduced in chapter seven. Transcriptions of the interviews and open-ended questions of the survey were coded by highlighting the most occurring opinions and experiences from the Covid-19 restrictions. The highlighted sections were then categorised under the three themes introduced previously. The coding revealed a high connection of experienced effects and the connections between the three themes of development, restrictions and recovery, while also the interview and survey results filling and supporting each other. For example, through understanding further the need for crisis management plans and recovery suggestions. The survey also supported the positive tone of the interviews for future recovery of the tourism industry in the area. Combining interviews with the survey close-ended questions, analysed using the mean, median and mode methods, an idea of the general common opinions and views could be used further in supporting the results of the coding of the interviews and open-ended questions looking into the above themes and views.

The following sections focus on themes mentioned above and the properties' views on restrictions, their impacts, development and the future. The analysis includes both qualitative and quantitative results combined into one interpretation while using both different analysis methods, as mentioned in Figure 2. The interview and survey analysis and results have been categorised into the following timeline: before the pandemic, the impacts of restrictions and the current situation and finally the development and future outlook. This way the results, while analysed using different methods are combined in the research findings.

8.1 Before the pandemic

The accommodation businesses were divided into two clear categories when it comes to pre-pandemic situation and set up. The one's that were set up multiple years before the pandemic and ones that were set up during the start of the pandemic. Businesses participating in the interview, were all set up before the pandemic with most being in business for more than two years. Out of the businesses taking part in the survey only four started trading during the pandemic and were not in business before March 2020. The properties set up before the pandemic we also more likely a main income for the entrepreneurs compared to ones set during the pandemic where most entrepreneurs still held on to their previous employments. There was a clear correlation between properties that had been in business for over five years and acting as a main source of income. Compared to properties that had only been trading for a few years were more often a secondary source of income. However, the survey results reveal a misleading truth behind properties classified as a main source of income. This might give the impression that most property owners also use it as their only source of income, however based on the interview data many still worked other jobs on the side which could also relate to the accommodation business and the tourism industry.

In some of the properties, the areas tourism nature becomes visible through the yearly occupancy. Seasonality of the tourism industry within the UK can be seen in some of the months of occupancy. The summer months as well as autumn school holiday periods and Christmas period are the busiest times at most of the properties. For properties focused on summer activities the seasonality of bookings was clearer. Though, many properties had adapted more of a focus on promoting events and the use of their property as venues. During the interviews, property owners described that the seasonality aspect that they usually experience is a lot more blurred compared to the usual bookings experienced in previous years in the Wye Valley. The seasonality aspect has been further influenced by the past year and the pandemic and touched on later.

Seasonality of accommodation bookings also relates directly with the size and capacity of the property within the research results. Bigger properties with a capacity for smaller events or larger groups of customers staying at once, reported less seasonality-based bookings. This also meant that for those properties revenue and profit was much higher in the previous years before the pandemic. Within the interviews P^1 and P^2 for example had larger capacity for customers, reported an average revenue of around £250,000 to £500,000 annually. For smaller properties the revenue was usually under £20,000, excluding tax and costs, a year and would act as their secondary income alongside other forms of income. Unfortunately, the higher the income of a property was before the hit of the pandemic, the greater the loss was due to long lasting restrictions and limited financial support.

8.2 The impacts of restrictions and the current situation

The impacts and the effect of Covid-19 restrictions with the UK bring a big divide between businesses. The restrictions, as explained previously changed constantly depending on the area along with what type of businesses could stay open. This meant that certain accommodation businesses suffered greater losses than others due to the difference between location and type of accommodation. Most differences were between large properties accommodating more than six people and smaller more self-contained accommodation. The main difference came from some businesses in the Wye Valley being located on Wales side while others are in England. This meant that a business would need to follow different rules depending on the location where their accommodation property was located at. In some cases, entrepreneurs owned multiple properties with some in Wales and others in England.

For White Feather, the losses could be considered lower compared to other accommodation businesses taking part in the research. This is mainly due to White Feather being able to not pay staff due to governmental support and due to not owning any of the properties themselves. Costs for the business went down to zero during the time of closing. The business only lost the possible revenue it would have gained through the commission and fees the properties pay for bookings, cleaning and other services.

During the start of the first lockdown in March 2020, over half of the properties taking part in the research were forced to close their business completely. Some properties took advantage of the small exceptions to these rules by renting out their property or providing it as accommodation for critical staff for example nurses, teachers and police. This meant that the rest of the properties taking part in the research all took advantage of the exceptions during at least one point of the restrictions being in place in 2020. However, the revenue received from these exceptions was described as very low and for many did not fully cover the costs as described in the interview by P[4].

All the accommodation businesses interviewed applied and were granted government financial support for their business and their personal income. During the first lockdown in the beginning of 2020, many businesses described receiving a lump sum that was between £10,000 for smaller businesses and around a maximum of £24,000 for larger businesses. However, this differed in the later lockdowns where the businesses needed to reapply for support and were provided with financial grants based on their property size, previous income, property value and losses. However, even the further grants provided later did not go near the average income of bigger properties.

The business financial support was accompanied by the *Job Retention Scheme* in effect in the whole of United Kingdom. The scheme main aim was that the government shall provide 70% of an employees and employers wages during the pandemic if their business has been advised to close. However, the maximum sum that could be claimed was £2187.50 a month. (HM Revenue & Customs 2020.) The main issue with the accommodation entrepreneurs interviewed was that for many, they kept their own salary low due to being entrepreneurs. This meant that for example for many properties interviewed within the survey results the amounts claimed through the Job Retention Scheme were less than £1000 a month. Many marked this as their biggest issue in the government schemes concerning entrepreneur accommodation owners.

One of the survey aspects focused on the businesses' opinions on the government grants received. Even though the majority of 40% had chosen to remain neutral when asked about their satisfaction with the government grants, the close second majority of 36% disagreed completely with the government grants and described that they were not enough. The ones not satisfied by the amount of grants achieved were medium to large sized accommodation businesses with larger properties.

The government scheme's financial support for some of the properties was the only income received throughout the first lockdown before July 2020. This meant that bigger properties with an annual revenue of over £100,000 could not have survived 2020 with just the government support alone. This was a different case to some of the smaller, seasonal properties with less than £20,000 yearly revenue. For them, the governmental support meant that their revenue increased and provided full security during the first lockdown until reopening in 2021.

Easing of restrictions during the summer of 2020 was described as a saving grace by many property owners. During the short reopening period in summer 2020, properties experienced an increase in revenue compared to the previous years of 2019 and 2018. For some smaller companies the revenue from the short reopening period was higher than they would have received in a full year. The demand for domestic travel after the first lockdown made sure that properties remained at over 96% capacity during the summer months. Some even reported those months as being fully booked at 100% capacity. Even smaller properties reported being fully booked and achieving revenue exceeding their yearly average. However, many were able to achieve greater revenue due to higher pricing and by providing extra services for example activities and hampers to quests.

The autumn of 2020 and the beginning of 2021 brought tough times for the larger accommodation businesses. However, the owners described that the governmental support combined with the exceptional revenue received from the summer months kept them afloat. Despite the success of the summer and financial aid, businesses described seeing a clear decrease in overall revenue in 2020. During the interviews this statement was usually followed by hope of 2021 summer and autumn booking increase and the positive outlook for the domestic tourism boom.

During the gathering of the data between the months of July and August in 2021, United Kingdom eased its restrictions starting in March 2021 and domestic travelling slowly returned to normal within England between April and June with Wales following suit only with slight differences in number of people allowed to stay in addition with most educational trips still being on hold. (Cabinet Office 2021a; Covid rules: What's…2021; Sargeant & Nice 2021.) This especially affected some businesses with properties on both sides of the border or who depend heavily on educational travel from school and summer camps.

All properties taking part in the research had reopened their doors by end of May. Since the properties were allowed to start taking in bookings in spring 2021, many were reserved for the rest of 2021 straight away. The Wye Valley and Forest of Dean made national news multiple times over the popularity of the destination succeeding UK's usual favourites of Cotswolds and Cornwall (Hughes 2021). For Wye Valley accommodation business in 2021 this has shown through the average high season occupancy of 60‒80% between properties rising as high as over 90% in most properties since reopening in spring 2021. For many this meant that recovering some of the losses from last year was made possible within just a few months of opening.

The exceedingly positive impacts experienced by most properties participating in the data collection should not take away from the devastating impacts for many. During the data collection process three properties reported profit losses that were too large to handle in 2020. This led to one property being sold during the data collection process and another being placed for sale. Some property owners expressed similar concerns over their financial situation if restrictions would resume later in 2021.

8.3 Development and future outlook

The data collected revealed a great divide in development implementation between the businesses. The majority not having implemented any development and also being reluctant to do so after the pandemic. Gathered with the interview data we can get an idea that the reluctancy is due to tightened finances and budgeting focuses. Properties that had not yet or already implemented new development were very eager to continue implementing new business practises, furnishments or ideas after the pandemic. However, the great divide between the data would mean that Covid-19 has not brought forward any specific changes for these property owners to develop. The interest towards new development seems to focus more on the personal view of the property owners combined with their financial situation and opportunities.

While larger scale development has not been possible for most accommodation businesses due to lack of incoming revenue and the loss in profit during 2020. Many businesses also expressed their troubles in acquiring renovation or development expertise due to restrictions being in place as well as the over demand for renovation services, building permits and other development services. Thus, many businesses have moved their plans for bigger development projects into the future and focused on more small scale, behind the scenes development.

What also became clear during the interviews was that many property owners misunderstood what is the scope of the word development. For many they thought this only meant the above bigger renovations or upgrades done to the property or adding new services with costs involved. However, development can be simple low or zero cost processes like re-evaluating the check in and check out processes or the property turnovers, pricing and so forth. Examples that many did not realise they had already done due to the pandemic counted as new development. This was the adapting process that properties made to abide by the new standards and restrictions for reopening that were in place.

Even with many developments put on hold, some of the properties focused on what they could develop for the future. Some properties chose to focus on improving and updating their marketing. One example of new marketing efforts adopted by accommodation businesses is adapting the government restrictions that allowed for influencers and media staff to stay at accommodations, to be used as marketing. The example of marketing success using this method comes from P^3, the owners described taking opportunities to allow media staff to stay at their property for photo shoots and other shows. The property had suffered greatly as they had only opened for booking five weeks before the first restrictions were placed. However, due to taking on this opportunity the owners landed a marketing opportunity that would lead to a media show coverage of over 1,000,000 viewers. In the interview, the owners said they wished other properties had taken the same opportunities in marketing as they did. Due to the marketing decision taken during the pandemic, the property is now fully booked until middle of 2022.

However, despite clear opinions on implemented development many were not sure about the future development of their property. It came apparent in the interview data that some were not so sure how to continue with the new processes already implemented after restrictions were completely lifted. That connects us to the future views that accommodation businesses shared within the interview and survey data. The properties shared their views of the future concerning recovery for the tourism industry and their own business as seen in Figure 3. Considering the different views and reasons we can look into the average view on entrepreneurs in the accommodation industry as to what they believe the end of this year and the next upcoming years will look like. A few aspects were already brought up by the accommodation businesses during the interviews. The following Figure gives us an indication of the opinions and view that the property owners have of the future outlook of the tourism industry and their property recovery.

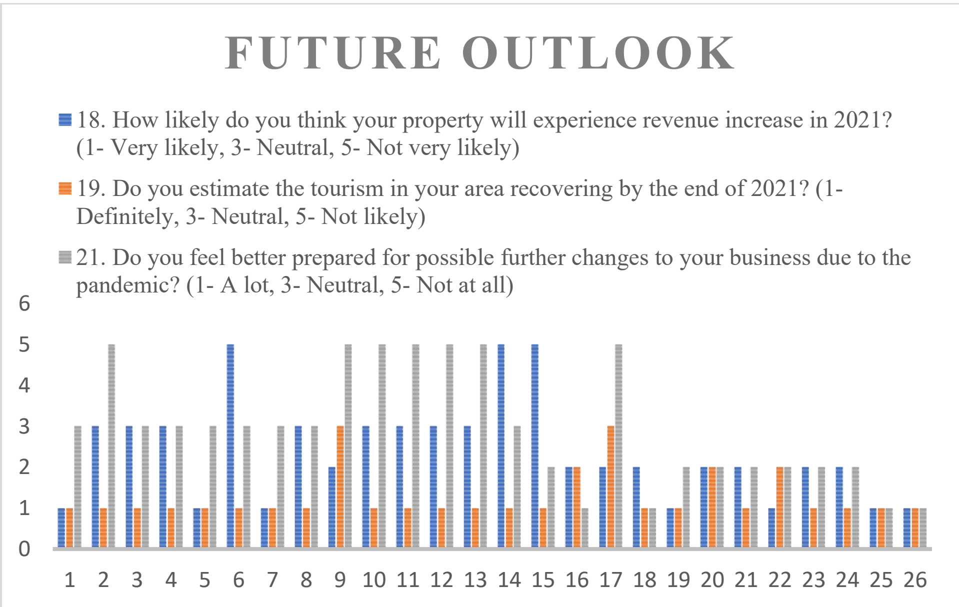


Figure 3. Future outlook of tourism survey and interviews (excluding White Feather interview).

The enthusiasm for the rise and continuing increase of the domestic tourism demand, continues to bring hope to the accommodation businesses for rest of 2021. Expectations for the continuing rise in demand is predicted to continue onto next year as international travel is still considered by many to be risky and difficult. Due to unkept holidays and increased savings during lockdowns, many UK families have more time and income to spent on travelling. However, many do not want to take the risk that international travel still brings. This keeps the domestic tourism market in the UK on the rise even as the normal summer tourism season is drawing to a close. When asked about the Wye Valley's tourism recovery outlook for the rest of 2021, over 77% of the properties said that the tourism industry will recover this year. This was also clearly connected to the positive view that many businesses thought they would see a revenue recovery for their business within this year as well.

Unfortunately, for many the autumn time of 2021 brings a lot of uncertainty. The continuing rise in case and the changing views on international travel prevent business owners from remaining confident about the continuing freedom of travel within the UK. Many of the property owners expect another set of restrictions to take place during the late autumn/winter period. For many this would bring catastrophic losses to profit, bookings and customer confidence. Properties also felt that despite the new processes and experiences many did not feel prepared for future changes to take place.

Property owners described in the interviews that a much bigger percentage of customers enquire about cancellation, rescheduling and cleaning processes of the property and business before placing their booking. This can be connected to the same worries that the property owners have themselves of new restrictions or possible lockdowns that might cause people to have to cancel or rebook their holidays. Communication and booking processes have had to change drastically for some properties to consider the pandemics effects and risks. The ever-changing situation and readiness of the government to implement new restrictions if needed keep many businesses and customers on their toes.

The one term that was brought up most when it came to future views was uncertainty. Be it over the change in customer behaviour as mentioned above or about future restrictions, the risk is great, and many consider it for their future. Few property owners expressed great concerns over being able to survive the rest of the year financially in case another lockdown would cut the rest of the year's revenue short. For many this would mean huge cancellations as events and school trips are able to continue later on in the autumn. The revenue losses for bigger accommodation businesses might become too great and many have considered closing or partly selling their business if another lockdown would take place.

For the future these uncertainties and changes can mean that many may steer away from viewing their entrepreneur business as their main source of income, resulting in less time and other resources spent on promoting and maintaining the properties. The shift of moving the management of their accommodation business to a third-party provider was already in motion before the pandemic but had increased in popularity since 2020. In the interview with White Feather, these changes could slightly be seen but were impacted by the restrictions with some properties being lost but others gained in their place.

9 RECOVERY STRATEGY SUGGESTIONS

Combining the literature and research result findings, suggestions for recovery strategies when it comes to the future of the tourism industries recovery in the Wye Valley. We have been able to look at the restrictions and what they have entailed as well as to look into the views of accommodation owners and how they have seen and experienced the impacts. Based on the research results and information from White Feather's CEO we can give suggestions for recovery strategies what accommodation owners can focus on in the oncoming recovery period of Wye Valley's and UK's tourism recovery.

What the primary research results highlight, supported with the inconsistency in relation to the government restrictions is that the recovery concerning the pandemic is still unpredictable. The uncertainty over future lockdowns during the autumn of 2021 brings difficulties in planning for the recovery of the accommodation industry in the

Wye Valley. The following suggestions focus on recovery for the end of 2021 and looking into the next year and future permanent development. However, the following sections also discuss two different scenarios for the rest of 2021: the risk of new restrictions and their possible impact on the recovery of the accommodation sector and the tourism industry in the Wye Valley and the scenario where recovery can continue at a steady pace since the reopening in March and April. The following chapters of new development and management strategies were evaluated and recommended based on the research results, with most of the new strategies and suggestions able to be implemented no matter the autumn scenario that would take place.

9.1 Development and implementations

If the last year and the experiences the tourism industry faced has taught us anything it is to be prepared and flexible. Businesses have needed to adapt and change at a much quicker rate than ever before. Within just a span of a week in the beginning of 2020, people had to close their business and find out ways to refund or reschedule customers. This continued for multiple times throughout 2020 with new restrictions and regulations constantly changing.

This is where crisis management plans can become of great use for businesses for the future as a learning lesson from this past year. Based on the research about the pandemics hit on the tourism industry combined with the research results, we can focus the crisis management plan on a couple of key factors. Those being the improvement of business processed concerning customer check in, check out, cancellation, booking policies and the property maintenance side for example changeovers. The improvements are good to have in place in either of the scenarios for the rest of 2021 and in the future.

There are clear main obstacles that the accommodation businesses in the Wye Valley would need to keep in mind in order to overcome what appeared in previous research together with the data collection. Gerwe (2021) describes the accommodation sectors biggest obstacles that the pandemic brought forward as the following: financial impact and the change in health and safety standards. The biggest impact of the pandemic for many of the accommodation businesses was the financial loss. Bigger properties are more likely to also have mortgages or rent that the owners need to pay, which means that it was impossible to get the costs down to zero despite the business being fully closed. Furthermore, this could mean that those properties are more likely to end up being sold or changed to rental properties. From the sampling in this research, the effect of this could already be seen.

The next big issue was implementing the new health and safety standards that the pandemic brought for the accommodation industry. However, in addition based on the data collected other business processes could also be improved. The improvements on the different processes concerning the accommodation businesses bookings can be quite simple. Most properties have already changed their terms and conditions when it comes to booking, cancellations and rescheduling's due to the pandemic. Having more independent customer check in and check out processes frees opportunities for the property owners to not be constantly available and for the customer to have more freedom when they check in to the property after the allowed time. Check out processes function very similarly as well. Properties can still have the latest time to check out, but the customer has more freedom exactly at what time they check out.

When it comes to cancellation and rescheduling bookings, as mentioned previously the customer behaviour concerning flexibility has changed a lot during the pandemic. More and more customers want to book their holidays last minute to avoid the risk of cancellations or rescheduling. Even after the pandemic and restrictions risks might be over, flexibility over a last-minute booking or rescheduling might be something many customers might want. That is something to consider as a property owner, how do you offer great service opportunities for flexibility without risking losing a booking over a last-minute cancellation. A certain limit to the time for when you can reschedule and cancel needs to be made but could maybe offer more flexibility compared to previous standards within the area.

When it comes to improving the property changeovers between customers many property owners mentioned having outsourced the job through another company. With cleaning standards and needs having changed due to different regulations concerning Covid-19, many had to convert from doing it themselves to hiring professionals. The time, products and knowledge that goes into to fully cleaning a property that it would be risk free from the disease takes a lot of work. Many also do not possess the tools and good access to cheap and affordable cleaning solutions and tools. For many it was cheaper and more flexible to move to outsourcing the service from a local company. This also offers an opportunity to perfectly schedule changeovers as the owners themselves or their workers would not need to be available and could take that time to organise other aspects for the next guest, to take more bookings, handle marketing and a lot more.

As mentioned in the interviews, many entrepreneurs emphasised the importance of continuing marketing efforts and strategies for a business during restrictions or even after being fully booked. Maintaining the interest of your clientele and improving your reach are important aspects to increase the growth and reputation of your business. This does not mean that businesses would need to pay for expensive adds or marketing efforts. Nowadays, marketing your property has become more available and you can achieve a bigger reach than in the past. Most properties taking part in this research maintain their own Facebook sites and Instagram accounts. Simple marketing through these platforms when its well targeted and scheduled can increase or at least maintain the image that has been built up.

Based on the recommendations from some accommodation business owners, the use of influencers or taking part in photo or video opportunities for your property can create great reach and as well usable marketing material for the future. As one property owner described one opportunity turned into many and provided good marketing and promotion material to be used later on through different platforms.

What consistent marketing also brings is a reminder for your future and past customers that you are still open, offering services and developing your business. During the pandemic many forgot to maintain their social media or any type of communication to the customer about the business besides booking enquiries. This could mean that many missed out on the possible bookings before reopening as customers might have been unsure which properties would be open and which ones not.

Even though the property might be closed, full or not taking bookings for a certain time, promoting and maintaining the properties image is still important. Some property owners mentioned that despite being fully booked for the rest of the year they continue to market their property to increase the interest and demand in it. This allows for more freedom when it comes to raising prices and looking at the services you offer. If you know the property is wanted, fully booked for most of the year, you have more opportunities to re-evaluate the property pricing. This was done by one property taking part in the research, marketing during the pandemic increased their demand to such great heights that they raised their prices. This made it possible to recover from losses quicker and offers them an opportunity to increase their development due to extra income while costs remained the same as marketing was done mostly by using social media.

9.2 Recovery scenarios

In the case where the United Kingdom does not enter another set of restrictions, the future still does bring risks. International travel is slowly opening its doors back again, this means that the boom of domestic tourism in the UK might experience a slight blow. Even with the customer behaviour changed slightly to prefer the safe and financially affordable option of traveling within their home country, the interest to go abroad will increase with time. Currently the risk and extra costs involved with international travel are a deterrent to many, however as soon as a shift in this happens, it will be hard to predict what that would mean for the domestic tourism destinations.

Luckily for the Wye Valley, domestic tourism has always been the main market and usual occupancy rates and tourism numbers maintain the areas businesses. We still need to take into consideration that the losses from last year have left many businesses with rising loans and lack of staff. The costs for maintaining these properties and catching up on pushed back development will come at a high cost. This would mean that the longer the domestic tourism boom can benefit the accommodation businesses the better.

It will be hard to estimate what the rest of the autumn of 2021 will bring in terms of the development of the pandemic. The worry over another lockdown is not ruled out and other restrictions might be likely if cases continue to rise. However, with the vaccination program and lowering hospitalisations (Office for National Statistics 2021), the future is looking more secure especially for the domestic market.

Despite the lowered risk of restrictions due to governmental efforts, the risk needs to be acknowledged and considered in the research. Even with a smaller sampling of a total of 26 accommodation businesses already one of the properties was sold, another one put up for sale and one that described the high risk of selling the property being a possibility if restrictions would continue. For bigger properties with high maintenance and staff costs, the losses are hard to gain, and many lost their mortgage services and businesses deals during the pandemic. Two bigger properties taking part in the interview mentioned the high risk they are taking with the autumn period of 2021. Without the scheduled bookings for the rest of 2021, they will have a high risk of being forced to sell the properties in order to pay off the costs and loans gathered during the pandemic.

There is no way to predict or prepare the properties for the autumn in case of another lockdown or restrictions. The properties can only follow the policies and processes already in place and rely on the hope of governmental support in case the worst was to happen. This section is part of the final suggestions as an acknowledgement to the risk that the pandemic still carries and to remind that recovery suggestions and plans could not be implemented if properties are once again forced to close completely.

As mentioned in the research results a big change from handling the accommodation business as their main employment or source of income happened due to the pandemic. Most of the accommodation business owners interviewed moved to their old employments and plan to keep working in them as the tourism industry is still unpredictable in its recovery. Unfortunately, that comes with the concerns from owners that they do not have enough time for marketing, bookings and changeovers along with a full-time job. Luckily, this is where many decided to turn to White Feather more even before but especially during and after the pandemic. Due to White Feather’s flexibility for businesses to purchase only one service like changeover and cleaning, many businesses quickly opted for the option.

9.3 Recommendations for White Feather

The recovery strategy suggestions and scenarios mainly focus on the accommodation businesses, however as mentioned above many are hiring service and working in co-operation with White Feather. This means that any development and implementations of new policies and processes also apply to White Feather itself. Most of the suggestions can easily be a part of the business be it an accommodation business or an accommodation management.

Due to the slowly growing business for White Feather, we know that business owners are in need of the service provided. The demand has been increasing already before the pandemic by property owners with second homes who have moved out of the area and cannot manage their properties as before. However, the shift of local property owners and businesses being interested in the service due to busy lifestyles or other fulltime jobs, family and hobbies was boosted by the pandemic. Business owners do not have as many resources that they would usually be able to spend on the property. Many of the accommodation businesses also described the hectic time and effort that it took to prepare the properties for reopening in 2021.

As recommended for the accommodation businesses marketing and development plays a big part in the process. Being able to successfully market your business and the services you provide steadily can increase demand and at least maintain and improve the image of your business. With the added services of social media management available for accommodation business customers, that marketing comes even more important. The marketing is not only a reflection of the company anymore but also provides a sample of the quality of services and content the businesses would receive by buying that option. Same would go for policies and processes for a business to become a client of White Feather. The new processes and how they are implemented should also offer flexibility and be able to consider future crises and scenarios that the tourism industry might face. Just like the accommodation businesses are suggested to offer flexibility to their customer, the same would apply in the B2B actions of White Feather.

White Feather has already done great implementation when it comes to the new health and safety standards that many customers seem to expect to continue after the pandemic as described by property owners. Adapting better disinfectant cleaning methods and assuring the safety and security of both B2B and B2C at the same time. It is not clear will the industry move towards expecting these standards to continue in the future but in the current recovery stage they are crucial to gain back the customer trust in the safety of travel (Gerwe 2021, 6).

Another aspect that White Feather can do to improve the recovery process for its customers, the tourism industry and other businesses in the Wye Valley. Since, the company is highly focused on local co-operation and promotion, maintaining and improving on this aspect through more marketing and increased collaboration can benefit all businesses. The more promotion and demand the accommodation businesses receive, the more possible revenue and customers the local shops, restaurants and activity providers can gain. As Gerwe (2021) explains, the accommodation industry in some areas has benefited and built up the local area around it. However, this means that many businesses have come to depend on the tourism and customers those accommodation properties bring to the area. By focusing on increasing the cooperation for all, there is a chance for a quicker recovery as the whole area recovers steadily with the help of the local community.

9.4 Summary

White Feather and the accommodation businesses will face challenges and uncertainty during the road to recovery from the pandemic. Even though the tourism industry is known for its resilience and quick recovery from previous pandemics and crisis, Covid-19 has forced us to rethink a lot of aspects of our travel habits and the outlook of the industry and its services. (Gerwe 2021, 6.) Reopening and re-establishing the customer trust and returning to a new normal is still ongoing with many businesses.

What still needs to be taken into consideration is that despite the suggestions considering finances and partly the available resources, for many businesses new development might not be a priority. The main priority for many property owners was to guarantee their financial security for the rest of the year moreover to look into the full extent of the losses faced and how that will affect their future.

Risk of more restrictions or another lockdown still exist and would halt the recovery process for many properties. In a worst-case scenario, we could also see many companies taking part in the research being lost and sold due to the costs and high losses due to the ongoing pandemic. In the end what accommodation owners and White Feather need to focus on concerning future crisis or scenarios is to update or create a crisis management plan for their business. If one is not already in place, the past years experiences and already implemented new policies and processes can be extended or expanded upon to suit the future needs.

10 CONCLUSION

The full impact of Covid-19 on the UK's tourism industry is most likely to be long lasting and has led to many people losing their livelihoods due to the pandemic. With a risk of further restrictions or lockdowns taking place, the accommodation businesses positive outlook might drastically change. For the future, this could mean that the positive outcome for many businesses based on the domestic tourism boom might turn to a travel plunge.

Furthermore, the research conducted was successfully able to report on some of the Wye Valley's accommodation business' reactions to the government restrictions placed throughout the start of the Covid-19 pandemic in the UK until August 2021. In addition, with the research being conducted as recovery took place the researcher was able to further examine the participants views on the recovery strategy the government has suggested and what impacts it would have on the tourism industry in the United Kingdom with a focus on their region.

However, the main aim of this research was to make sure that if or more likely when another pandemic or crisis hits that the tourism industry can be better prepared. Within the findings that were conducted it is clear to see that it will continue to have a long-lasting impact on the accommodation businesses of the Wye Valley. The impact is however followed by the mix of uncertainty for the future in addition with a positive view on the tourism industry of the Wye Valley recovering swiftly.

10.1 Validity and reliability

The reliability and validity of a study is determined by the scope, replicability, and transparency. For a study to be reliable and valid it needs to fulfil the basic requirements of research ethics. This means that the study should be transparent enough in its methods and research results that it is possible to be replicated at any given point. (Carminer & Zeller 1979, 11−12.)

Reliability looks at the consistency of the research methods used, and the results gathered. Validity on the other hand focuses on if the methods used within a study are correct and match the anticipated results of the study. (Kimberlin & Winterstein 2008, 2276.) All data measurement methods used in a study should be picked with longevity and consistency in mind. The same methods used at a later stage should produce similar results in the same study. (Website of Research methods, reliability, and validity of measurement 2021.) Within this study consistency of measurements themselves can be replicated but the circumstances that the study focuses on provide a temporary and hard to replicate situation. With the pandemic of Covid-19 continuing and the events of 2020 being fresh in our minds, gathering the data now and being able to provide more accurate results is easier.

Research on the current Covid-19 pandemic and its effects on global industries brings about many issues despite the vast offering of research articles and material. Most of the conducted research focuses on predictions and estimates of future affects or processes that consider only the latest available data. A good example of research that has completely changed as more information and development of the pandemic has come to light is a research paper by Fotiadis, Polyzos and Tzung-Cheng (2020). The research paper as well as other available research about the Covid-19 pandemic also tends to focus more on the whole of global tourism industry recovery rather than looking at individual destinations. The estimations of recovery between separate countries or even destinations of different attractions differ greatly and often are generalised and rely heavily on the government restrictions lifting on the agreed times. (Department for Digital, Culture, Media & Sport 2021, 12−13). Most of the Covid-19 recovery research was also conducted in the year 2020 as the one mentioned above, with a very different expectation of recovery as the original dates for post lockdown and global restrictions were supposed to come to an end in autumn 2020.

A main interview was conducted with White Feather, who holds the necessary information about the operation, financial aspect, resources, and history of the accommodation properties and the tourism market of the area before, during and slowly entering post Covid-19 restrictions. Interviews were also conducted with 4 local entrepreneurs working in liaison with White Feather have also been conducted to provide even more detailed information about the property's resources and management during the past year of 2020. Further on 22 local entrepreneurs owning accommodation businesses and co-operating or working together with White Feather took part in the survey.

As mentioned previously the interview and survey questions conducted in this study were created based on exploratory data gathered while working in the Wye Valley for the accommodation industry during the pandemic. The questions were later tested and modified to provide the best answers on entrepreneur's views and experiences on the pandemic and the future of development in the industry. Thus, the study has been crafted to include all necessary information to provide sufficient and reliable suggestions for recovery for White Feather and the entrepreneurs involved.

The mean, median and mode method used to analyse the close-ended and Likert-type scale questions of the survey carry disadvantages when it comes to analysing the questions clearly. The methods are less effective in analysing the data if the statistics are not normally distributed on the scale. This would mean that questions were answers fall into both extreme ends of the scale cannot be reliably analysed using this method.

As seen in the research results section later on, this became the case with one of the questions where the scale was not distributed evenly within the answers. (Sullivan & Artino 2013, 541−542.) Luckily this was not the case with many of the answers and the one questions was evaluated as a divide in answers rather than using the median or mean to represent the results.

The survey questions that used the Likert scale can be easily rated on their validity using the Cronbach's alpha calculation which determined if the answers to similar questions are consistent. For this questionnaire this can be done to questions 810 and 16−17, the first questions look into the views on government restrictions while the next set look into views on development (Appendix 1). For the first questions of 810 the Cronbach's alpha equalled to 0.58226, which means that the answers can be classified as reliable on a moderate scale. A number above a 0.7 is desirable as answers receiving this scale can be considered highly reliable as stated by Hinton, Brownlow, McMurray and Cozens (2004). For the questions 16 and 17 the Cronbach's alpha equalled to 0.734018, which would mean that the answers can be considered highly reliable.

The main two themes that were scored on their Cronbach's alpha number are one of the important ones in terms of research results to be used when conducting the final recovery suggestions for accommodation businesses. Despite this, while building and modifying the questions for the survey, more effort should have been directed into making sure more questions could have been analysed using the Cronbach's alpha number to determine their consistency.

This study aims to provide recovery strategy suggestions based on the property owners' experiences of 2020, resources, and the general recovery of the UK tourism industry. It is not possible to provide an accurate prediction of the recovery pattern for the UK tourism industry with the pandemic still ongoing and changes to restrictions being reviewed each month and subject to change. However, the study can aim to develop towards a guideline of recovery suggestions or actions that can be adapted or adjusted according to the current state of the industry at the time. The recovery strategy suggestions are created for the case company of White Feather which manages most of the Wye Valley's accommodation properties together with local entrepreneurs.

10.2 Reflection

The study offered a great learning experience and look into the Covid-19 restrictions and slow recovery of the Wye Valley. The pandemic and restrictions brought obstacles and challenges along the way in terms of data collecting and research. With the situation constantly changing in the UK, gathering research was a continuing task through the writing process. The properties participating the research provided a nice sampling for a small area however, the write wishes that a bigger sampling could have taken place to receive more accurate results of how the restrictions have shown. A bigger sampling would have provided more variety on the distribution of the results in the survey and thus given a better indication of the average answer.

The recovery strategies remained partly superficial as the properties differed in size and resources. However, with more generalised suggestions, properties are able to implement the options on their own scale, resources and wants considered. It would have been beneficial to follow and talk to the property owners more personally and took a closer look at operations during the recovery process. However, due to the hectic timetable of reopening and still some restrictions taking place, this proved to be too difficult and time consuming for the current research.

In the future, a historical research report is suggested to look at the community in five years' time to evaluate how life has returned back to normal. What could also be looked at is how the businesses have moved forward and to see what has continued to be adopted as from the recovery strategy suggestions. It would be beneficial to look at the same companies that took part as well as new companies that joined straight after the recovery started to take foot.

10.3 Feedback from White Feather CEO Emma Nelson

Thesis co-operation with White Feather and Emilia Tölli:

Recovery strategy suggestions for White Feather and customer companies after Covid-19 restrictions

Emilia has skilfully described and understood the Covid-19 impacts in the Wye Valley for the tourism industry. While also looking at all the possible differences and outcomes of those impacts. The thesis fully encompasses the mission of White Feather: “Helping owners realise the potential of their holiday letting business by providing them with the support and guidance where they need it”.

Emilia’s suggestions on development highlight perfectly the changes White Feather has implemented and should implement further. Everything from terms and conditions, flexibility and changeovers was tackled in the thesis. This has given White Feather future ideas to further expand on the developments and continuing their process even after Covid-19.

The marketing sections of the recovery suggestions something that can be seen from experience. Seeing marketing as an expense rather than an investment is something White Feather wants to help change. That as well as continuing the ongoing and developing communication towards our customers. Without these important aspects of recovery, it will be hard to stay in the game.

The thesis process has been done with flexibility and the difficult times that 2020 and 2021 spring brought on us in mind. Despite changing restrictions and limitations Emilia was able to summarise important aspects of recovery and development as well as the views of the property owners in the study. The points and recovery strategies suggested also perfectly fit the ideals and the area, with promoting local and cooperation.

All in all, the future is as Emilia has stated, unpredictable. There is hope that the tourism industry can continue on its path of recovery. However, we are holding our breath. The recovery strategy suggestions are something White Feather will us to create a crisis management plan for us as well as our B2B customers. This is one aspect that we had neglected but are now focusing on more than ever. (Nelson, Personal communication 13.9.2021.)

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APPENDIX 1

Covid-19 Property Survey

A survey looking at the year 2020 and Covid-19 restrictions influence on the tourism industry, especially from the accommodation perspective. Objective is to look at possible best recovery scenarios to increase business in 2021 and onwards.

The survey will be automatically sent after clicking the submit button at the end. Any issues filling this survey please contact emilia.tolli@gmail.com.

1. What is the name of your property/properties?

Short-answer text

2. Where is your property located? (e.g. Tintern) *

Short-answer text

3. How long has your property been in operation? *

- Less than a year
- 1-2 years
- 2-5 years
- 5+ years

4. Is your business/property your main source of income or a secondary source of income? *

- Main source
- Secondary source
- Other...

5. Was your property available before the pandemic? *

- Yes
- No
- Became available during the pandemic

6. Was your property allowed to stay open during the first lockdown? (Starting 23rd of March) *

- ◯ Yes
- ◯ No
- ◯ Other...

7. How many months where you open in total in 2020? *

Short-answer text

8. Were the government restrictions regarding your property clear and consistent? (1- Not at all clear, 3- Neutral, 5- Very clear) *

	1	2	3	4	5	
Not at all clear	◯	◯	◯	◯	◯	Very clear

9. Were the restrictions placed on accommodation industry by the government helpful in your opinion? (1- Very helpful, 3- Neutral, 5- Not helpful at all) *

	1	2	3	4	5	
Very helpful	◯	◯	◯	◯	◯	Not helpful at all

10. Do you agree or disagree with the statement: My property received enough government support during the restrictions? (1- Totally agree, 3- Neutral, 5- Totally disagree) *

	1	2	3	4	5	
Totally agree	◯	◯	◯	◯	◯	Totally disagree

11. How did you see your property revenue change during the lockdowns? (1- Clear increase, 3- No change, 5- Clear decrease) *

	1	2	3	4	5	
Clear increase	◯	◯	◯	◯	◯	Clear decrease

12. How many months has your property been closed due to Covid-19 since January 2020? *

Short-answer text

13. Has your property reopened since March/April 2021? *

- ◯ Yes
- ◯ No
- ◯ Other...

14. If your property has reopened, was the process of reopening simple and on what date did you open?

Long-answer text

15. Have you implemented any new development in your business/property due to Covid-19? (e.g. refurbishment, new services, systems) *

- ◯ Yes
- ◯ No
- ◯ Not yet
- ◯ Other...

16. Would you consider implementing new development ideas in your property to enhance recovery? (1- Definitely, 3- Neutral, 5- Not likely) *

	1	2	3	4	5	
Definitely	◯	◯	◯	◯	◯	Not likely

17. Do you think Covid-19 restrictions offered time for property and business development? (1- Not at all, 3- Neutral, 5- Definitely) *

	1	2	3	4	5	
Not at all	◯	◯	◯	◯	◯	Definitely

18. How likely do you think your property will experience revenue increase in 2021? (1- Very likely, 3- Neutral, 5- Not very likely) *

	1	2	3	4	5	
Very likely	◯	◯	◯	◯	◯	Not very likely

19. Do you estimate the tourism in your area recovering by the end of 2021? (1- Definitely, 3- Neutral, 5- Not likely) *

	1	2	3	4	5	
Definitely	○	○	○	○	○	Not likely

20. What would you have done differently last year with your business/property if you could? *

Long-answer text

21. Do you feel better prepared for possible further changes to your business due to the pandemic? (1- A lot, 3- Neutral, 5- Not at all) *

	1	2	3	4	5	
A lot	○	○	○	○	○	Not at all

22. Do you feel like there is anything else you would like to add about your property and your own experience from 2020 and the pandemic?

Long-answer text

APPENDIX 2

Interview questions

Question 1
What is your name and occupation?

Question 2
Can you tell a bit about your business/property?

Question 3
Can you describe the tourism in your area before the pandemic?

Question 4
Describe your business operation before the pandemic.

Question 5
What about operation since start of first lockdown in March 2020?

Question 6
Any views on the effects of the government restrictions in 2020 until spring 2021?

Question 7
Did you receive government support for your property/business during any of the restrictions?

Question 8
How would you estimate the profit/loss during 2020?

Question 9
How do you think the tourism recovery in your area will develop?

Question 10
When do you see your business/property returning to pre-pandemic numbers?

Question 11
Anything you would have done differently in your business/property in 2020?

Question 12

Describe any new developments you have implemented or obtained ideas for during the pandemic?

Question 13

In your opinion, what are the best recovery strategies for tourism businesses in your area in 2021 and onward?

Question 14

What do you think are the biggest obstacles in recovery in your business/property?

Question 15

Anything more you would like to talk about your business/property?