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# COVID-19 IMPACT ON CULTURAL AND NATURAL PAN-EUROPEAN THEMATIC ROUTES

## Uticaj kovida 19 na panevropske kulturne i prirodne tematske rute

### Abstract

Although the definitive effect is not measurable yet, it is evident that the hospitality and tourism sectors have endured the greatest pressure in the coronavirus pandemic crisis. This paper presents the analysis of the impact of the crisis on the thematic tourism routes. The emphasis is placed on investigating the impacts on market structure and seasonality, being the external dimensions, and on employment and cost-controlled measures as instruments of the internal management dimension. The case study analysis employed is based on the empirical examples of Pan-European thematic routes titled "Roman Emperors & Danube Wine Route" (RER & DWR) and "Via Dinarica Route" (VDR). The paper also discusses models of various scenarios for business recovery and further development. The findings show that COVID-19 has had a minimal impact of -2% on employment in the thematic routes and that massive cost control measures have been predominantly aimed at fixed operational costs. Thematic routes have experienced a decrease in operating time of up to 50%, and at the same time are undergoing market restructuring, with domestic and regional guests being the leading segments. Research further shows that the most needed form of government support through crisis mitigation measures is destination promotion support, followed by wage support and utility cost reduction.

**Keywords:** COVID-19, thematic routes, cultural routes, tourism, performances.

### Sažetak

Uprkos tome što konačni efekti još uvek nisu merljivi, evidentno je da su ugostiteljski i turistički sektor pretrpeli najveći pritisak tokom krize koju izaziva pandemija korona virusa. Rad predstavlja analizu uticaja kovida 19 na tematske turističke rute. Naglasak je stavljen na istraživanje uticaja pandemije na tržišnu strukturu i sezonalnost, kao eksterne dimenzije, kao i na zapošljavanje i mere kontrole troškova, instrumente unutrašnje dimenzije upravljanja. Analiza studije slučaja zasnovana je na empirijskim primerima panevropskih tematskih ruta pod nazivom „Rimski carevi i Dunavski put vina“ (RER & DWR) i „Via Dinarica Route“ (VDR). Rad takođe nudi modele različitih scenarija za oporavak biznisa i dalji razvoj. Nalazi pokazuju da je kovid 19 imao minimalan uticaj od -2% na zapošljavanje na tematskim putevima, a da su značajne kontrolne mere troškova dominantno usmerene ka fiksnim operativnim troškovima. Tematske rute su zabeležile smanjenje operativnog vremena poslovanja do 50%, a istovremeno su doživele restrukturiranje tržišta, pri čemu su domaći i regionalni gosti postali vodeći segmenti. Analiza pokazuje i da je najpotrebniji vid podrške koju vlada pruža kroz mere ublažavanja krize podrška unapređenju destinacija, kao i podrška platama i smanjenje troškova komunalnih usluga.

**Ključne reči:** kovid 19, tematske rute, kulturne rute, turizam, performanse.

## Overview of the pandemic's impact on tourism

The rapid development of modern medicine has been the hallmark of the previous century. Despite these achievements, since the beginning of the 21st century, the world has been hit by several epidemics and pandemics. Previous research has shown that pandemics negatively influence the tourism and hospitality sectors [23], [24]. Pandemics have particular negative economic impacts on tourism [20], such as those caused by the 2002 SARS pandemic [18], [36], [63], the 2009 swine flu pandemic [47], [56], the 2013 Ebola epidemic [44], the 2015 Zika virus epidemic [73], and, finally, the 2019 coronavirus disease (COVID-19) pandemic, which is still ongoing and whose definite impact cannot be measured at present.

Following the reports of the first pneumonia cases of unidentified origins in China in December 2019, the COVID-19 crisis spread worldwide almost immediately. Accordingly, the World Health Organization proclaimed a global pandemic on January 30 2020 [22]. In the meantime, the COVID-19 crisis has demonstrated that tourism and hospitality are seen as secondary and are extremely sensitive to external shocks [9]. Additionally, “the indirect effects of COVID-19 are likely to be considerably higher than with SARS” [66, p. 2], since medical and health crises have a more significant negative impact on tourism than outbreaks caused by economic and financial issues [72], or even by terrorism [44].

The COVID-19 crisis also challenged the neoliberalism approach, whose main characteristic was reducing the government's role [25], given that governmental (state-driven) authorities have proven to be much more effective in securing the necessary life and economic necessities during the COVID-19 period [43]. However, “the question here is if global and national authorities recognized the shocking effect on tourism and if the defined measures will support the survival of the tourism and hospitality sector” [32]. The most noticeable impact of the pandemic on the liberal market could be observed through changes (interruptions) in global and local supply chains, shifts in consumer behaviour caused by fear and panic, and the forced adjustment on the side of producers, service providers, and retailers [50]. Various forms, sizes, and impacts of government

interventions in different countries have been recorded [61]. The COVID-19 intervention actions, such as lockdowns and the postponement of events, have affected travelling heavily, and the tourism industry has been confronted with a shift from “over-tourism” [28], [60] to “non-tourism” [23, p. 2]. Recent research [74] estimates that the economic impact of COVID-19 on tourism will be up to five times greater than that of the 2008 global economic crisis. Therefore, national economies are introducing tourism recovery measures, as the importance of the tourism sector for national GDP and service exports directly correlates to the amount and forms of measures implemented [30]. Sustainability has been highlighted as the most crucial approach to reviving tourism [23]. However, a national crisis management plan has been more of an exception, for instance, in Australia [52] and the United Kingdom [4], than a standard in virtually all tourist destinations. Correspondingly, the focus of academic research in the field of crisis and disaster management in tourism “is dominantly focused on the marketing and promotional aspects rather than on the other important aspects of recovery for the destination as a whole” [59, p. 22]. This includes internal factors, such as economic effects, contingency plans, sustainability, and/or recovery measures.

## Understanding the framework of the cultural and natural thematic routes

Thematic routes are mostly based on cultural and natural heritage [53] and connect natural and man-made tourism resources [40]. In most cases, the thematic routes cross over to more than one country, stimulating curiosity to discover new experiences while satisfying the need for travel. Therefore, thematic routes are seen as a platform for regional tourism and economic development [33], and by crossing neighbouring regions, routes become pillars of international tourism products [70] and joint destination products.

As a critical determinant of destinations [19], cultural factors strongly influence international tourism [76]. Cultural tourism is best communicated through the development of routes that can be based on various cultural foundations [58] – such as cultural heritage [34] or wine brands [37] –

and are a form of thematic routes. Cultural routes are the bond between tangible and intangible resources, which are used to attract the current generations of “new tourism” consumers known as “creative tourism” consumers [31], incorporating into cultural tourism “more experiential and creative forms of tourism” [64, p. 109]. These routes provide exciting cultural experiences to travellers while visiting route highlights [75]. Cultural tourism experience is determined by social interaction, authentic local clues, local lifestyles, services, culture/heritage, and challenges [8, p. 8]. Numerous cultural routes, such as networks of interlinked sites [65], have recently been growing, and in Europe, many have been formed through public-private partnerships [68]. Cultural routes interlink historical and natural features [57], creating a unique combination of cultural and natural thematic routes.

### COVID-19 impact on cultural and natural thematic routes

Thematic routes communicate with the market under specific brands and have been managed through a specific mechanism. Consequently, the COVID-19 lockdown has led to a shift to digital consumption of indoor cultural entities and thus to decreasing demand for these kinds of cultural institutions, putting them in financial crisis, insolvency, and furloughs of employees [62]. In contrast, it has opened up new development possibilities for outdoor cultural institutions and natural sites. Research [26], [41], [67] also show that numerous indoor museums will not survive this challenge. The question of a “new normal” experience along the cultural tourism routes raises more philosophical questions since “branding and consuming cultural heritage is an expression of nostalgia for an idyllic and idealized pre-modernity” [62, p. 7]. Nevertheless, nature-based and outer joint heritage sites, especially along natural thematic routes, experience less negative economic consequences because of the decreasing social distancing limitations. As a result, the statistics in this sector show a smaller decrease in the number of visitors [27], again acting as an inevitable part of the sustainable development of non-urban areas [35]. Moreover, the pandemic situation affected routes of business management models

to the extent that it may even alter current organizational structures and polarise professionals’ abilities to operate in a crisis context [2, p. 255]. Even though the COVID-19 crisis is still present, earlier research [5] proves that route attractions, such as cultural and historical sites and museums, need to secure comparable economic metrics during crisis periods and survival of the new business models; at the same time, it demonstrated the need to apply a social return on investment analysis to show broader social importance for the local, regional, and national communities.

The COVID-19 crisis also tests the pillars of globalized cultural consumption, causes a drop in the global tourism system, and influences the shift from international to local offers and demands [54] and regional tourism. Regional tourism offers become more significant because of COVID-19, where regional networks of entities on Pan-European levels, such as the European cultural routes, provide great business platforms for participants in terms of economic sustainability, tourism brand, and visibility. At the same time, tourist destinations should focus on developing domestic tourism products [30] and, together with regional tourism initiatives, use them in the recovery phase. COVID-19 has also tackled overcrowding at cultural sites, creating an opportunity for a sustainable approach. Neuts and Nijikamp [42] noticed that many cultural sites faced many visitors and that over one-third of locals in Europe found that tourists negatively impact cultural heritage sites. Cultural routes, which are the most dominant form of thematic routes, have experienced a significant drop in demand during the COVID-19 period regarding specific categories of tourists – e.g., young travellers, with a decrease of 70% – despite the expected demand resilience of demand in this segment.

### Research questions

This paper presents an analysis of the selected cases to understand the COVID-19 impact on the internal management (employment and cost control measures), external management (seasonality and market restructuring), and prospect aspects (sentiments) of cultural and natural thematic routes.

The impact of COVID-19 on employment in tourism is evident [16], and the sector is experiencing higher furloughs and unemployment [29]. Since tourism generates 10% of global employment, most global and national COVID-19 mitigation measures put employees first. Therefore, this paper aims to convey an understanding of the impact on employment in thematic routes. This led to the first research question (Q1): How did COVID-19 influence employment in thematic routes?

Additionally, because of lockdowns and similar crisis mitigation measures, it is evident that tourism stakeholders should focus more on cost control measures since costs in tourism are highly sensitive to external volatilities [17]. Therefore, cost control measures, developed by using previously published articles regarding the COVID-19 impact, were also included in the analysis. Q2: How does COVID-19 influence the cost management of thematic routes?

A disproportion of tourist travelling, known as seasonality [1], was affected by COVID-19, considering that the lockdown and travel bans strongly affected the mid summer and winter seasons, leading to a 70% decrease [69]. Tourism seasonality for cultural destinations, including cultural routes, is different from that of traditional seaside destinations [14], and patterns of seasonality in cultural destinations are mainly driven by non-climatic and institutional factors (i.e., cultural festivals) [55]. Since seasonality is a time aspect of tourism performance [71] and challenges are handled by introducing new tourism products and services [19], this was also part of the case analysis in this paper. Q3: How does COVID-19 influence seasonality in the thematic routes?

International travel restrictions due to COVID-19 impacted market restructuring, and as noted before, tourist destinations started developing domestic tourism products [30]. It is due to the fact that domestic travellers and tourist movements are taking a leading position in global tourism recovery, with a market share of 75% in the total tourism economy on average [45]. Therefore, Q4 is defined as follows: How do COVID-19 influence market restructuring and shift from international to domestic and regional tourists in the thematic routes?

Prospects and scenarios are also significant. Therefore, the timing of recovery and three scenarios were suggested

[46], according to which international tourist arrivals started to recover in July, September, and then December, with rates of 60%, 75%, and 80%, respectively, compared to the previous year. Subsequently, Q5 is: How do thematic routes stakeholders perceive current and future situations and match the global predictions?

The first step was to identify (map) the routes stakeholders (i.e., involved entities and institutions) [15], since “the nature and degree of crises-led transformations due to COVID-19 depend on whether and how these stakeholders are affected” [61, p. 313].

## Description of the case study

The most important Pan-European network was developed through the “cultural routes” of the Council of Europe (CoE). These thematic routes aim to communicate how various countries’ cultural heritage on European soil contributes to a shared and living cultural heritage [11], testifying the distinct role of thematic routes in global tourism today [40]. As a genuine transnational tourism product, the Pan-European thematic routes add value through experience diversification [13].

The CoE [12] reported that 40 thematic routes passed the certification process since first introduced in 2010, including various topics, periods, and brands. The following methodological elements are considered during the certification process [13]: socioeconomic sustainability, nature sustainability, tourism commercialization, heritage restoration, awareness of heritage, and the level of quality of the interlink between natural and historical heritage sites. Based on this methodology, two Pan-European thematic routes were selected for the case study to analyze the COVID-19 impact. The selected routes were the “Roman Emperors & Danube Wine Route” (RER & DWR) and the “Via Dinarica Route” (VDR). Based on the authors’ research, it is essential to emphasize that: 1) the selected routes meet CoE-defined methodological criteria (with RER & DWR being certified in 2015 and recertified in 2019 by CoE), and 2) both routes are part of previous academic research. While the RER & DWR is an example of a cultural thematic route, the VDR is based on interlinking nature and local heritage and is a natural thematic route.

The RER & DWR is inspired by the Roman Empire and wine-growing cultures along the Danube River (at present). It covers areas along the Danube, Moesia Superior, and Moesia Inferior and regions along the Adriatic Sea, called Illyricum (historically observed around 100 AD) [49]. It is a transnational product covering numerous heritage sites, including wine regions, thus creating a network around small and medium enterprises (SMEs), local authorities, and public cultural institutions [13]. The route passes through eight European countries: Hungary, Croatia, Serbia, Bulgaria, Romania, Albania, Montenegro, and Bosnia and Herzegovina. It is a network of sub-destinations created around individual archaeological sites, locations, nature-based points, places, and buildings, monuments to the leadership of the Roman emperors in Late Antiquity. It covers the following sub-themes: Sites with Direct Connections with Emperors, Sites Connected with Military Campaigning by an Emperor, Sites Resulting from an Emperor's Military Policy, Sites Resulting from Emperors' Political Policy, and the Danube Wine Regions.

The VDR is also an international thematic route based on attractive natural resources [39]. Although the focus is on validating nature and local heritage along the Dinaric Alps, this thematic route meets the CoE criteria regarding socioeconomic and natural sustainability, tourism commercialization, and the need for high-quality interlinks between natural sites. The route creates a network of key stakeholders [51] and destination developers [38]. The VDR has been developed for specific categories of tourists, but at the same time, by following CoE criteria, it is a platform for the sustainable local economic development of the Pan-European regions that it traverses [6]. It is a megatrail that extends from Albania to Slovenia and combines a white, blue, and green trail that is connected to Albania, Bosnia and Herzegovina, Kosovo\*, North Macedonia, Serbia, Montenegro, Croatia, and Slovenia, covering sub-destinations that follow the natural flow of the Dinaric Alps and the Adriatic coastline. A modern visitor combines a stay in an untouched natural environment – as offered by this route – with modern technology, expecting a complete experience from GPS navigation, smartphones for photography, and communication to create as rich an experience as possible.

When developing the RER & DWR and VDR, the first step was to define the key thematic route pillars; notably, a valid reason for their development, clear vision, market potential, and inventory of cultural assets [15], [21]. Additionally, one of the most important indicators of the socioeconomic sustainability of thematic routes is establishing route and site management through formal managerial institutions [7]. Accordingly, the RER & DWR and VDR meet these criteria. Certainly, the overall success of the routes depends on the level and quality of cooperation among different stakeholders along the route itinerary [15]. In contrast, professionals working along the route should be educated and trained [48], which is why the identified stakeholders along the RER & DWR and VDR were part of the research process.

A questionnaire was distributed in two ways: two-thirds of the respondents were from the RER & DWR, while the rest were engaged in the VDR. An electronic questionnaire was sent to the route stakeholders and to the management authorities of the routes. This was followed by in-depth personal interviews (via Zoom) only with route management authorities to understand their perspectives better and fill in gaps in the information provided through the questionnaires. A total of three in-depth interviews were conducted with representatives of both routes, making it 100% of transnational management authorities. For the VDR, eight completed questionnaires were returned, representing 100% of the national managerial institutions. For the RER & DWR, a total of 17 completed questionnaires were received, representing 75% of the key stakeholders' authorities. The process took place between September 15 and November 15 2020.

Analysis of the structure of the involved stakeholders along the routes shows that they are engaged in different activities. Furthermore, the majority are cultural and archaeological sites (30%), followed by national tourism offices (20%), hotel/restaurant/catering (HORECA) businesses (20%), and then local SMEs engaged in handling visitors (tour guides) (10%), non-governmental organizations (NGOs) (10%), and private-public regional development offices (10%).

From the geographic location point of view of the stakeholder analysis, although cultural and natural sites



are located outside of urban areas and in natural settings, the official headquarters of the stakeholders along the researched routes are mostly (52%) based in national capitals and large cities (e.g., Bucharest, Belgrade). The rest are based in smaller towns (e.g., Butrint, Albania) and cultural sites (e.g., Stobi, North Macedonia). Most of the cultural institutions are established and run as state institutions, working under the auspices of ministries, and have been operating for more than 20 years. Conversely, some of the stakeholders, such as in the VDR, are NGOs that are just being established.

The sample structure provides different insights and perspectives, enabling a credible overview of the current situation.

## Results and discussion

### Impact on employment in the thematic routes

Before the COVID-19 crisis, the average number of employees in cultural route stakeholders was 19.3, but a majority (51%) of them had less than ten employees. Female employment is relatively high in cultural routes, and they can be classified as the top provider of gender equality possibilities. Also, the average number of female employees is 56%, ranging between 38% in archaeological sites and 89% in local tourism organizations. In contrast, support for youth employment is limited in the cultural routes. The average share of employees below 30 years of age in cultural routes is 23%, and 30% do not have employees younger than 30. However, one specific category of stakeholders – NGOs – attracts mostly younger employees and is an excellent example of entrepreneurship, providing a solution for youth employment by starting new businesses.

However, the COVID-19 crisis had almost no adverse effect on employment. The total number of laid-off staff was 2% in total in all the observed institutions. The institutions that experienced the dismissal of workers are archaeological sites, which indicates a particular vulnerability of cultural institutions in times of crisis. All surveyed stakeholders reported job loss in direct workers along the researched routes, with one exception: the open-air sites, which reported an increase in the number of

visitors and an increase in the number of employees (66%). One of the surveyed institutions reported an expected reduction of 15% in direct workers, along with a drop in the number of businesses. Correspondingly, 30% of those surveyed reported drops between 70% and 90% in direct jobs connected with tourism. Even sharper drops, between 50% and 97%, were reported in indirect jobs by all institutions that responded to this question.

### Impact on cost control measures in the thematic routes

During the COVID-19 crisis, cost control measures implemented by the stakeholders in the routes were directed towards operational fixed costs. Most frequently, it was decided in the group of so-called measures of the first choice to cut marketing and operations costs by reducing payroll expenses and by partially or fully closing capacities. It is widely accepted to express solidarity among employees by cutting payroll expenses rather than cutting the number of employees (permanent or part-time workers). Additionally, companies did not hesitate to postpone capital investments, while there was no recorded paid leave for the employees. Moreover, as expected, first ranked is the use of all forms of state aid, followed by operational adjustment by applying new hygiene standards, without which all sites are deterrent to visitors.

To conclude, solidarity with employees during COVID-19 was prioritized ahead of striving to maintain and increase the productivity and efficiency of business operations.

### Impact on seasonality and market restructuring in the thematic routes

Research demonstrates that the average yearly operating period for cultural routes is not year-round but rather seasonal. Many institutions have reduced the number of working hours per month. Most businesses were open only for three months because of the lower numbers of tourists coming to the sites during the first peak of the COVID-19 pandemic in the first half of 2020. The operating period of cultural routes was shortened from six months in 2019 to up to three months in 2020.

The HORECA sector along the cultural routes took the biggest hit, while other categories of stakeholders were lacking in monitoring systems. The HORECA sector reported a sharp decrease in visitors (between 80% to 90% decrease). The drop in tourist flow also led to a reduction in revenue, where there are two groups: a larger one reporting a decline of 90% and a smaller group reporting a 20% decrease in revenue. What is particularly important is that sharp reductions in the number of visitors and revenues were reported by natural sites with more than 200,000 visitors annually and by hotels with more than 1M euros of revenue in 2019. These highly developed accommodation businesses are more sensitive because of more employees and higher fixed costs. In many cases, guests have replaced them with individual accommodation units to avoid grouping situations (dining rooms, lobbies, and so forth).

The percentage of foreign visitors dropped by 50% compared to 2019, now relying solely on visitors from the region. Other responses also point to retaining visitors from the region and domestic travellers. What was noticed in other analyses was also confirmed: tourism products related to staying in natural environments are gaining importance after the COVID-19 crisis. This group of tourism service providers is exposed to higher business

risk even in normal circumstances, which provides them with a higher degree of flexibility in a crisis. However, the “strategic window” opened up due to the pandemic, and now is the opportunity for actors in the routes to use it. There are significant differences between business results. Accordingly, strategic reorientation and tactical marketing measures will gain importance in the future.

Changes in the structure of visitors’ origins highlight the dramatic consequences of the impact of the pandemic. The share of visitors from distant destinations, such as from other continents, which was not significant and was being built with great efforts over a long time, is currently significantly reduced (e.g., China, the United States, South Korea). The same applies to the most dominant segment of visitors in 2019, from European countries. Europe was a key segment for all the routes, and depending on the season, tourists from European countries were the leading generators of tourism flow and international receipts. The interruption of tourist flow and turnover significantly endangered visits from other European countries and the role of the key segment was taken over by visitors from the region. Although the decline of European and distant visitors is significant, in some destinations, it was noted as exceptionally high (e.g., Butrint, Albania, had a 99% drop in European tourists). Approximately 40% of

**Table 1: Cost control measures employed during the COVID-19 crisis**

Measures of the first choice	Frequency	Additional measures	Frequency
Cutting marketing and promotional budget	70%	Using available government support measures	70%
Payroll cut	60%	Investment in new hygiene standards	60%
Partial closure of the capacities	50%	Cutting the operational capacities	50%
Complete closure of the capacities	40%	Renegotiate supplier agreements	30%
Postponing capital investments	40%	New strategic partnerships	20%
Reducing part-time headcount	10%	Additional employment of housekeeping staff	10%
Hiring freeze	10%	Reducing permanent headcount	10%

Source: Authors’ research.

**Table 2: Market restructuring – major countries of origin ranking**

	2019 – Countries of origin	I-VI 2020 – Countries of origin
On the Via Dinarica Route (VDR)	Regional market: Serbia Other markets: Germany, China, the Czech Republic, Poland, Slovakia, Austria, Italy	Regional markets: Serbia, Bosnia and Herzegovina, Albania, Kosovo*, North Macedonia Other markets: China, Germany
On the Roman Emperors & Danube Wine Route (RER & DWR)	Regional markets: Serbia, North Macedonia Other markets: Italy, Germany, Poland, Russia, United Kingdom, Slovenia, Cyprus, Turkey, China, Switzerland, France, Norway	Regional markets: Serbia, Bosnia and Herzegovina, Albania, Kosovo*, North Macedonia, Montenegro, Croatia Other markets: Greece, Poland, Russia, China

Source: Authors’ research.

the surveyed thematic routes reported a decline in the number of foreign visitors and the revenue generated by this segment as being over 80%. A very frequent answer from stakeholders was a “decrease of 90%; notably, in one case, even a 99% decrease in the number of visitors”.

It is easy to see that the origin of tourists is shifting from distant destinations to nearer ones. Distant destinations have but disappeared, and the countries of the region are gaining importance, which a simple observation can see during the summer season.

### Forecast and mitigation measures for the thematic routes

Half of the surveyed institutions forecast that the effects of the pandemic will be present for a period of 12 to 24 months. However, 40% of stakeholders in the routes predict that the impact of the pandemic will last less than a year, and half of them (20% of the surveyed sample) state that it will last three to six months. Regarding the experiences and predictions in other reports, this forecast may indicate that actors along the routes are not well prepared for the upcoming situation. The participants on the RER & DWR are particularly optimistic, predicting three to six months of COVID-19 impact. Source markets for these two partners are central European countries, and they might look like the most probable region to recover.

Adjusting and reducing activities and costs are more dominant than proactive marketing measures for the researched routes. Post COVID-19 measures to be implemented in the short term offer multiple choices

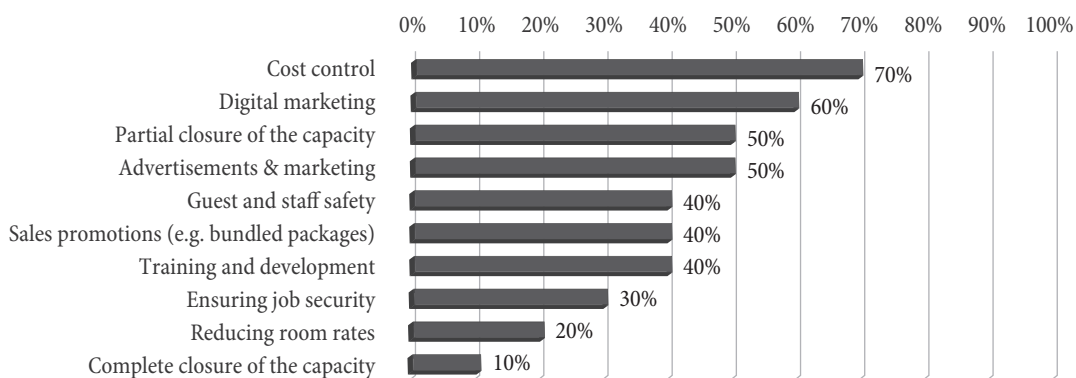
for executive teams. A broad spectrum of measures was observed, mainly implemented by the non-business community, including museums, archaeological sites, NGOs, and similar institutions.

According to the frequency of the expected application in the conditions after the pandemic, the results show an alternation between passive measures of adjusting and reducing activities and costs to the new situation and active measures of boosting market appearance to achieve an accelerated return to the previously reached level of business. The top-ranked measure, cost control, is passive but quite understandable for times of crisis. A similar one is a third-ranked measure, i.e., partially closing the capacity.

The second-ranked measure, digital marketing, which means adapting to the contactless business conditions that consumers prefer out of fear of infection, can be assessed positively. Partial closure of capacity is predicted to be much more in use than complete closure, as well as the non-creative measure of rate (price) reductions. Forty per cent of institutions are oriented towards training and development after the COVID-19 crisis, which is undoubtedly a constructive activity. What is surprising is that all stakeholders from the VDR, a route where activities are performed in a natural environment, are planning a partial or complete closure of their capacities.

According to the stakeholders along the routes, the most needed government aid is destination promotion support. It is recommendable for the actors along the thematic routes to ask their governments for an active measure of support in marketing, precisely, as it is justified

**Figure 1: Post COVID-19 recovery measures**



Source: Authors' research.



even in stable business conditions. Then, other anti-crisis measures are expected - tax rebates, loan moratoriums, and employee provident fund support.

The lower-ranked measures are wage support (40%), utility costs reduction (30%), and lower interest rates (20%). Notably, some of these measures were top-priority measures, considering the activities of regional governments. Specifically, wage support, employees provident fund support, loan moratoriums, and tax rebates were implemented by five out of six surveyed governments. Although participants' gratitude for government measures is generally present, there is a noticeable difference in the ranking of the desirability of measures by market participants and the frequency of the application of measures in regional economies.

Government support will be needed, starting from the beginning of the COVID-19 crisis – either in the long or short run – to overcome the current problems. Half of the surveyed sample expected government measures to last more than one year, and out of those, 10% considered that support would be needed for more than two years. Nonetheless, half of the sample considered that support would be necessary for up to 12 months. In this group, 30% expected measures to last 10 to 12 months, while 10% expected to support at least half a year and 10% for just one quarter of the year. Hoteliers expected long-range support for more than one year. These findings are broadly in line with small and medium enterprises [3], [77].

## Conclusion

Thematic routes, as a tourism product that emphasizes the joint cultural and natural heritage of Europe, face substantial challenges due to the COVID-19 crisis. The anticipated

operating months of the routes were reduced, with only one-third expecting to operate for only three months. This affected their business performance because of a lack of international tourists and decreased international receipts, but visitor demographics have dramatically shifted to the local and neighbouring markets. Archaeological sites showed a particular vulnerability to reduced tourism flows and experienced the most significant employee reductions. In cases where experience is based on open-space sites, increases in revenues and visitors were recorded, showing that the concepts of open-air museums and sites were essential. Cost control measures have widely prioritized protecting workers at the expense of other operational costs. Route stakeholders prefer support going forward, such as destination promotions, demonstrating a positive approach to recovery.

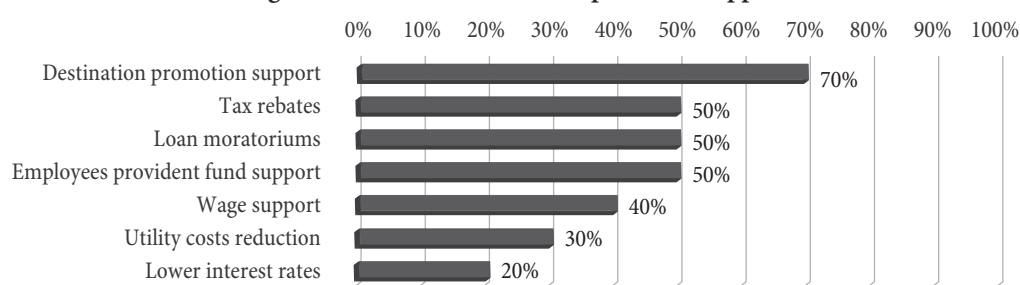
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Figure 2: Post COVID-19 most preferred support



Source: Authors' research.

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