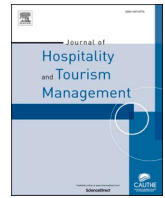




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# Destination governance in times of crisis and the role of public-private partnerships in tourism recovery from Covid-19: The case of Macao

Yim King Penny Wan, Xiangping Li, Virginia Meng-Chan Lau<sup>\*</sup>, Leonardo (Don) Dioko

*Macao Institute for Tourism Studies, Colina de Mong-Ha, Macau*

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## ABSTRACT

The coronavirus disease (COVID-19) has had a significant negative impact on many industries, tourism being among the most severely impacted. To recover from the crisis speedily, a responsive mode of governance that can draw on different stakeholders' efforts is required. Through qualitative interviews with key informants from major associations and government offices related to tourism, this study examines how Macao adopted public-private partnership governance to aid the recovery of its tourism industry. Specifically, the study investigates the roles of government and the crisis leader in post-COVID tourism recovery, the changes in consumer markets, and collaborative efforts of tourism business sectors and destination marketing organizations. This study contributes to deciphering how public-private partnerships can help tourism recovery, as well as the importance of crisis leadership in the process. The study also provides suggestions for industry partners regarding how they can act and respond to crises more effectively.

## 1. Introduction

The coronavirus disease (COVID-19) which was declared a global pandemic by the World Health Organization (WHO) on 12 March 2020 has brought significant social, economic, and environmental costs globally. Among all industries, the tourism industry is one of the most severely impacted. As the pandemic spread, many countries and cities closed their borders. In 2020, international tourism arrivals declined by 93 percent compared with 2019 (Tourism International, 2021). The pandemic also brought significant changes in consumers' requirements and behaviors, posing great challenges to tourism destination managers and tourism business operators (Sigala, 2020).

To recover from the crisis, an effective and a responsive mode of governance has been required (Neupane, 2021; Vargas, 2020). Governance concerns how societies are governed (Pierre & Peters, 2005). It is generally referred to as "all patterns of power, authority and rule that can secure order, and it is relevant to situations where there is a hierarchical state, where the state depends on others, or where the state plays little or no role" (Wan & Bramwell, 2015, p. 316). Accordingly, an effective and responsive mode of governance is needed to secure order, especially in times of crisis such as COVID-19. Ordinarily, governments tend to rely on traditional bureaucratic command and control mechanisms to govern tourism (Valente et al., 2015). However, conventional

types of governance may be outmoded and inadequate in the context of sudden and severe crises such as pandemics. Thus, effective and responsive governance for tourism crisis management requires a government to shift its role from a steerer to that of an enabler in order to facilitate stakeholder collaboration toward common goals (Pierre & Peters, 2005). This is especially crucial for the tourism industry, given its highly interdependent nature (Paraskevas et al., 2013). The urgency and importance of establishing public-private partnerships during the pandemic was recently underscored by the United Nations World Tourism Organization (UNWTO) in its 2020 "Global Guidelines to Restart Tourism" report (UNWTO, 2020).

Prior studies underscore the crucial role played by governments (Pierre & Peters, 2005; Vargas, 2020). For example, during a pandemic, the government is the key player to address major challenging issues, such as establishing isolation measures, hygiene requirements, and ongoing support for tourism businesses. Some studies also point out the important roles played by the city's leader, whose leadership style and methods can significantly affect the recovery of the tourism sector (Mitroff, 2004; Wardman, 2020). At the same time, governments need to facilitate public-private partnerships to ensure different sectors fully understand and cooperate with new government requirements and to assist in offering new and innovative tourism products to accommodate market changes (Lai & Wong, 2020). It is therefore necessary for

<sup>\*</sup> Corresponding author.

*E-mail addresses:* [Pennywan@iftm.edu.mo](mailto:Pennywan@iftm.edu.mo) (Y.K.P. Wan), [Xiangping@iftm.edu.mo](mailto:Xiangping@iftm.edu.mo) (X. Li), [Virginia@iftm.edu.mo](mailto:Virginia@iftm.edu.mo) (V.M.-C. Lau), [Don@iftm.edu.mo](mailto:Don@iftm.edu.mo) (L.(D. Dioko).

research to address not only the role of government in times of crisis such as the COVID pandemic, but also how it can forge networks of effective partnerships between public and private stakeholders in times of crisis, and how tourism-reliant communities, policymakers, and industry can work together via shared roles and formulate strategies for recovery.

Macao is selected as a case study to understand how public and private sectors partnered to spur the recovery of the tourism industry from COVID-19. Macao's heavy reliance on the tourism and casino gaming sectors rendered it economically vulnerable during the pandemic. Although as of August 2021 Macao had accumulated only 60 COVID cases and no deaths, travel restrictions caused visitor numbers to drop from 39.4 million in 2019 to 5.9 million in 2020 (Macao Statistics and Census Service, 2021). Although various regions and states implemented different types and levels of stringent policies and measures to control the COVID-19 pandemic (Hale et al., 2021), not all governments enjoyed the full support and cooperation of different sectors in society (Jørgensen et al., 2021). Macao's contrasting experience is remarkable, government and tourism business operators having engaged collaboratively in a rare demonstration of public-private partnership, resulting in later improvements in visitor numbers and revenues (Liu et al., 2021). It is therefore worthwhile to investigate the experience of Macao in adopting and pursuing a public-private partnership approach to recover from the pandemic.

The resilience and recovery of tourism destinations via effective governance appears to be seriously understudied. For example, many studies relating to COVID-19 and tourism are confined to how the hospitality sectors and governments responded to the crisis (Lai & Wong, 2020; Loi et al., 2021) or the impact of the pandemic on cities' hospitality and tourism industry (Lim & To, 2021; Liu et al., 2021). Also, despite the increasing number of studies on COVID-19 and tourism, few have applied theories or perspectives of governance and the role of public-private partnerships in their study framework. Sigala (2020) advocates the need to adopt relevant perspectives to approach tourism in the post-COVID era:

COVID-19 tourism research should not only be the means to overcome the crisis and resume previously charted economic growth trajectories. It should lead to the refocusing, repurposing, reframing and reinterpretation of research questions, methodologies and outcomes, so that tourism stakeholders can in turn redirect their actioning, conduct and evolution. To that end, COVID-19 tourism research will be benefited by embedding, adapting, reflecting and expanding the theoretical lenses and perspectives of a much greater plurality of disciplines and constructs to guide and implement research (Sigala, 2020, p. 314).

Building on the perspective of governance and the literature on public-private partnerships and tourism crisis management, the current study examines the governance of Macao in its tourism recovery from the crisis. In particular, this research has three aims:

- (1) To investigate the roles and strategies adopted by the Macao government (particularly the city's leader) in tourism industry recovery.
- (2) To shed light on how the Macao government has forged an effective network of partnerships between public and private stakeholders in times of exceptional crisis such as COVID-19.
- (3) To explore how a public-private partnership governance approach can be effectively applied in tourism recovery efforts.

## 2. Literature review

### 2.1. Governance and public-private partnerships

Governance concerns how societies are governed and ruled (Pierre & Peters, 2005). Due to increasingly complicated social and political circumstances like rising community aspirations for democracy, deregulation and marketization, economic recession, globalization, global calls

for sustainable development, and crises and disasters, governments are no longer able to steer alone (Bramwell & Lane, 2011). Governance signifies a new way of governing and refers to the collaboration of different stakeholders to secure a collective goal (Pierre & Peters, 2005). It involves "processes for the regulation and mobilization of social action and for producing social order" (Bramwell & Lane, 2011, p. 411), as well as the coordination of non-governmental actors such as businesses, voluntary groups, and local communities into a cohesive network. The government acts as the leader to mobilize resources and facilitate decision-making amongst the actors and to determine the practices, rules, and strategies in response to changes and crises (Pierre & Peters, 2005). Through adaptive learning and trial-and-error efforts, partners in a stakeholder network can search for "a more suitable or more effective form of governance adjusted to specific purposes and contexts" (Wan, 2013, p. 166). Among the most effective forms is the public-private partnership, or PPP.

A public-private partnership refers to a cooperative arrangement between the public and private sectors (Graci, 2013). The benefits of PPP, as Neupane (2021, p. 55) notes, is that it "brings together stakeholders with different objectives and skills, and resources in a formal or informal voluntary partnership to improve the attractiveness of a regional destination, its productivity, associated market efficiency, and the overall management of tourism". According to Graci (2013), public-private partnerships have the following characteristics:

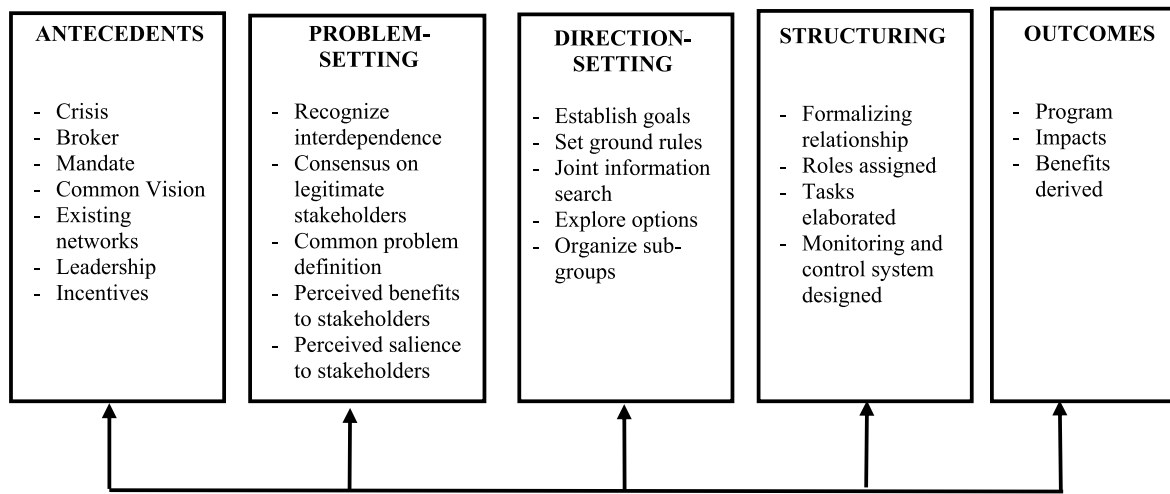
- Each stakeholder has their own roles and responsibilities to contribute to their common goal.
- Stakeholders are independent and self-regulated and interact through negotiation.
- Stakeholders solve problems constructively to narrow differences.
- Stakeholders have joint ownership of every decision made.
- Stakeholders bear collective responsibility for the destination's future.

As a form of governance, PPPs are intriguing because they render governments and authorities on an equal footing and in partnership with various stakeholders—over whom they traditionally exercise oversight and regulation—for the sake of achieving better and more effective outcomes. Despite their known advantages, however, PPPs do not materialize easily or simply.

Ordinarily, PPPs evolve slowly, in a series of development stages over time. Selin and Chavez (1995) propose a five-phase development model of tourism partnerships (Fig. 1). The first phase, antecedents, refers to the crisis or event that triggers the development of the PPP relationship. The second phase, problem setting, requires stakeholders to realize their interdependence and to identify common problems. The third phase is direction setting, which involves establishing goals and exploring options. The fourth phase is structuring, denoting the formation of collaborative relationships, assigning roles, and monitoring performances. The final phase is outcomes, being the consequences of the tourism partnership, such as the benefits derived and impacts. A partnership is self-regulated and dynamically evolves to seek solutions collectively in response to changing circumstances (Graci, 2013). Sigala (2020, p. 313) adds that the speed, degree, and nature of recovery depends on "how these stakeholders are affected by, respond to, recover and reflect on crises."

### 2.2. Are PPPs still effective under the COVID-19 pandemic?

Prevailing studies appear strongly to support PPP governance as being essential when a tourism destination faces different crises. This conclusion is based on the ideas that tourism is a highly interdependent industry, that no single sector can influence tourism development, and that each sector controls different resources, so there are often conflicting views. The PPP "enhances the resilience of tourism organizations and destinations in crisis situations, strengthens their defense



### An Evolutionary Model of Tourism Partnerships

Source: Selin and Chavez (1995)

Fig. 1. An evolutionary model of tourism partnerships.

mechanisms, limits potential damages and allows them to bounce back to normalcy faster” (Paraskevas et al., 2013, p. 130).

Several studies underscore the importance of PPPs for implementing tourism recovery strategies. Liu et al. (2021), for example, report that the casino gaming industry in Macao collaborated closely with the authorities in steps to lock down casinos, implement very strict safety measures, and reallocate jobs among hospitality employees instead of dismissing them. Khanal (2020) reports how the public and private sectors worked together in Nepal to develop national standards for safety to restore visitors’ confidence; to innovate new tourism products to attract domestic consumers; and to design programs to educate residents, hospitality employees, and visitors regarding preventative pandemic measures. Existing forms of PPP are therefore useful to steer industries through crisis situations. But given the extreme and prolonged duration of the COVID-19 pandemic, as well as the severity with which it has tested governments and varying degrees of public-private collaboration, a timely question is whether PPPs remain durably effective, especially in the context of tourism recovery efforts.

The unprecedented nature of COVID-19 challenges the effectiveness of existing PPP models. For example, prior to COVID-19, Racherla and Hu (2009) classified crises based on two indicators, namely probability of occurrence and level of control: crises were categorized as unexpected (e.g., terrorist attack, earthquake), conventional (e.g., economic downturn), tractable (e.g., rampant inflation), or extraneous (e.g., fire, food poisoning). The recent COVID-19 pandemic crisis is health-related and global in scope, as well as indiscriminately severe and sudden in its impact. Another challenge to PPPs is the severity of the distinct and profound changes heralded by the pandemic, especially in terms of market demand. For instance, more people now prefer to travel individually instead of joining group tours, thus leading travel agencies to offer more tailor-made services and packages. Customers are also becoming more mindful of hygiene and safety (Sigala, 2020), resulting in the growing adoption of mobile apps, self-service kiosks, and even robots to deliver meals to guestrooms (Sigala, 2020). Finally, compared to pre-COVID crises, the role of destination marketing organizations (DMOs) appears also to have shifted, from being primarily a destination promoter to a platform builder that facilitates tourism businesses’ access to distributors, services, and information as part of a destination-wide collaboration (Vargas, 2020). DMOs now also provide incentives to encourage new tourism product innovation and to communicate

government directives to tourism operators (Kuščer et al., 2021). In view of these profound changes, and as tourism practitioners struggle in the ongoing aftermath of COVID-19, it is pertinent to reexamine the continued effectiveness of predominant PPP models by closely studying exemplary cases of its implementation under the challenging circumstances brought by the pandemic.

#### 2.3. Adapting PPP governance models in the context of COVID-19

Established PPP models tend to underplay two factors: (a) the role of governments and (b) crisis leadership. This is understandable given that PPP arrangements are often forged during non-crisis periods or for developmental purposes. But in times of exceptional crises such as COVID-19, both factors are likely to be imperative in fostering public-private cooperation. Firstly, governments play a crucial role in cultivating PPPs as they are “the principal actors in political processes, and they often remain responsible for providing incentives and imposing requirements on actors in promoting objectives around common goals” (Wan & Bramwell, 2015, p. 318). Salem et al. (2021) note that resilience and recovery strategies require partnership and coordination among stakeholders and timely government intervention in managing the collaborations. In addition, prior studies reveal that some governments offer subsidies and interest-free loans to businesses and employees to ensure continuity of employment (Khanal, 2020; Loi et al., 2021). In Egypt, the government supported the hotel industry by giving “health information, guidance on protection methods for hotels and their employees, funds for retaining staff, and suspending rental and utility payments for renters” (Salem et al., 2021, p. 10).

Secondly, the speed of crisis recovery depends very much on leadership (Foster et al., 2020). A good crisis leader possesses certain attributes. Wardman (2020) summarizes 13 key attributes of crisis leaders during the COVID-19 pandemic: planning and preparing, narrating a clear-sighted strategy, making meaning (i.e., understanding the extent of risks involved), giving direction, differentiating people’s needs, credibility and trustworthiness, transparency, openness, partnership and co-ordination, empathy, and solidarity, as well as being responsive and adaptive to media engagement across traditional and digital platforms. Finally, a good crisis leader should also constantly review crisis management progress by listening to feedback, monitoring outcomes, and then adjusting strategies in a timely and responsive manner (Kuščer

et al., 2021). If PPPs appear to be effective even under difficult conditions brought by the unprecedented pandemic situation, this is possibly attributable to active government interventions as well as demonstrable leadership actions during the crisis.

2.4. An adapted PPP framework for crisis management

To address the above inadequacies in extant PPP models, a modified conceptual framework for tourism PPP governance and development in a crisis context is proposed (Fig. 2). In this adapted model, severe negative impacts of COVID-19 on tourism destinations (e.g., stress, worry, unrest, and economic downturn) stimulate and necessitate the formation of PPP governance to help the tourism industry cope and recover speedily. Crucial to the development of PPP governance is the crisis leader, who reacts and provides direction to facilitate the PPP. That leadership response is followed by the DMOs and tourism business operators, who together forge new strategies to cope with suddenly changing market demands. The formation and development of PPP then follows four phases—namely, problem setting, direction setting, restructuring, and outcomes. The outcomes and impacts of the PPP will

feed back to the crisis leader, who then adjusts strategies in the process of recovery.

2.5. Macao as the research context

Macao is a neighboring city of Hong Kong (SAR in China) and Zhuhai (China) and was designated a world-class tourism and leisure center by China’s Central Government. Before the pandemic, casino gaming and tourism contributed over 80 percent of the city’s income and attracted more than 39 million visitors annually from mainland China and Hong Kong (Macao Statistics and Census Service, 2021). Macao’s government has been applauded for its triple zero policy during COVID-19: zero new infections, zero infected patients, and zero deaths (Loi et al., 2021). The stringent policy has successfully curbed infections and paved the way for recovery (Liu et al., 2021). The actions of the authorities (led by the Health Bureau) and how they coordinated with the private sector to combat the pandemic have been credited for being precise and timely (Liu et al., 2021; Loi et al., 2021). Preventive measures were adopted, including temporary suspension of casino and leisure venues, cancellation of public events and festival celebrations, and border closures. At

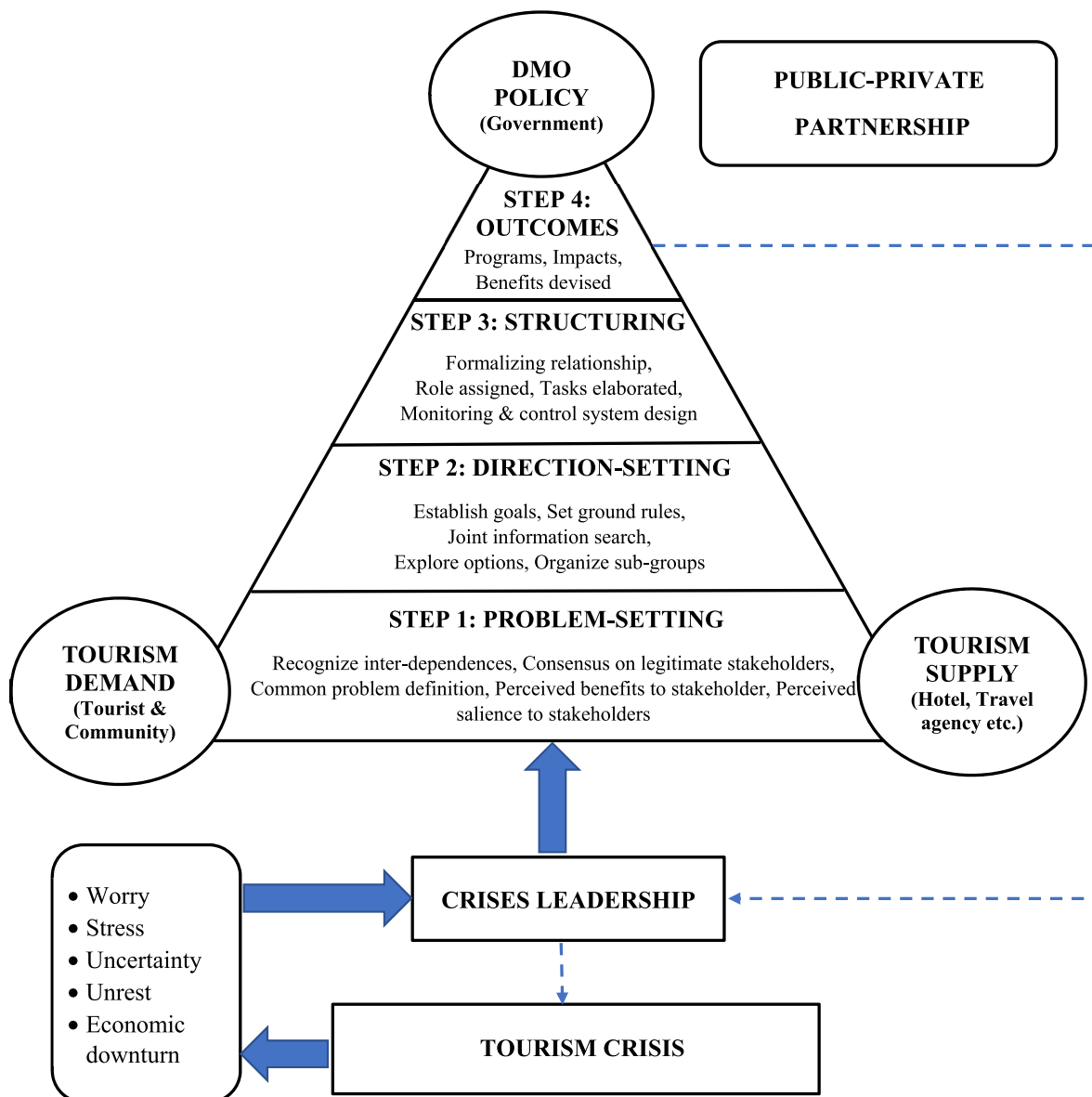


Fig. 2. Conceptual framework of the study.

the same time, economic stimulus incentives were implemented in the form of tax cuts, e-vouchers, business subsidies, and local consumption schemes. These government-led measures encouraged the industry to operate in a cooperative and responsible manner (Wan & Bramwell, 2015). As a result, Macao was among the first regions to resume social order and reopen the border for Chinese tourists (Liu et al., 2021).

### 3. Methodology

This study adopted a qualitative face-to-face research approach. A qualitative approach is considered suitable because this study is exploratory in nature and, through in-depth interviews, interviewees can express their insights and experiences more openly and freely (Miles et al., 2014). Semi-structured interview questions were developed based on the literature covering governance, public-private partnerships, and tourism crisis management and recovery (Graci, 2013; Mitroff, 2004; Sigala, 2020; Vargas, 2020; Wan & Bramwell, 2015). Questions covered aspects like conditions and the impact of COVID-19 on Macao's tourism industry and tourism businesses, recovery process and strategies, policies, and barriers and opportunities in the post-COVID period.

As the current study aimed to explore Macao's continuing effort and experience in restoring its tourism industry through PPPs, the research population included both public and private members of the tourism industry. Purposeful sampling was used. The Macao Government Tourism Office (MGTO), a government DMO, was identified as a principal interviewee representing the public sector. For the private sector, associations were approached in tourism-related areas, including hotels, travel agents, retail outlets, and event industries. Macao has a unique and strong association culture (Lee, 2011). During colonial times, local associations were formed around professional interests; political, social, and economic concerns; and geographic origins. These associations served as informal political parties, promoting members' mutual interests and regulating local communities' affairs. This culture persists to the present day. Therefore, although only representatives from the associations were approached, these representatives also spoke on behalf of their respective association members (Lee, 2011). Official invitation letters were sent to target interviewees in January 2021. A total of eight respondents accepted the invitation, which included representatives of the MGTO and seven tourism-related associations or sectors (Table 1). Face-to-face interviews were conducted in the interviewees' offices. Interviewees were briefed about the purpose of the study and informed that their responses would be used for academic purposes only and treated with strict confidentiality. Interviews were conducted in Cantonese and audio recorded with consent. Each interview lasted between one and 2 h.

Interview transcripts were translated from Chinese to English. Three researchers conducted open coding manually and independently. Following guidelines by Lune and Berg (2017), thematic analysis was conducted to contextualize the connections between categories and themes. Interview notes and audio recordings were checked several times. Multicolor highlighters were used to identify and label the codes. Coding led to the emergence of several categories. Similar categories were grouped together. Interview transcripts were frequently compared with emergent categories to identify themes and subthemes.

During the research process, data validity and trustworthiness were ensured. Firstly, data analysis was done separately by the three researchers and coding results were compared and cross-checked between them. A high level of intercoder agreement between the three researchers was achieved (Lune & Berg, 2017). Furthermore, the researchers made a conscious effort not to invent their own interpretations and instead based interpretations on the interviewees' own words. In addition, an effort was made to ensure that no single interviewee's ideas would dominate the answers to the research questions (Lune & Berg, 2017). Secondly, steps were taken to ensure that interpretations reflected the meaning as put forward by the interviewees by eliciting their feedback after coding (Williams & Morrow, 2009). Thirdly, this study

**Table 1**  
List of the interviewees.

No.	Office/ Association	Association Objectives and Memberships	Interviewee Position	Gender
1	Macao Government Department	This office assists in formulating and implementing tourism policies of Macao SAR to enhance Macao's destination reputation.	Head	F
2	Event & Exhibition Association	This association engages in representing and coordinating Macao's convention and exhibition industry. There are 96 member organizations within the industry chain.	Chief Director	M
3	Exhibition & Trade Association	With more than a thousand individual and corporate members in convention businesses, the organization promotes regional cooperation and talent development for the industry.	President	M
4	Tourism Association	This association aims to improve service quality of travel agencies and promote Macao travel products. The membership includes more than 70 travel agencies in Macao.	President	M
5	Tour Guide Association	This association for tour guides in Macao engages in representation and development of local tourist guides.	President	F
6	Hotel Association	The association aims to strengthen ties among hotels, and promote tourism development in Macao. The membership includes 40 leading hotels in Macao.	President	F
7	Hotel & Tourism Association	This association aims to represent the industry and promote cooperation between Macao and the overseas tourism industry. Their members include most of the well-established travel agencies in Macao.	President	M
8	Retailers & Tourism Association	This association represents Macao's local small and medium retailers and contributes to Macao's retail industry's sustainable development.	Chief Director	M

also collected secondary sources of data such as newspapers and government statistics to obtain a more holistic picture of the phenomenon, and to triangulate the results of interviews (Williams & Morrow, 2009).

## 4. Findings

### 4.1. Impacts of COVID-19 on Macao's tourism

As Macao is heavily reliant on tourism, COVID-19 "hit the city's tourism industry hard" (Interviewee 5). An interviewee from the government said: "The pandemic is the most unpredictable crisis that Macao has ever faced. Unlike typhoons or earthquakes that we can predict how long they last for, this time the effects are long and unpredictable" (Interviewee 1). The pandemic brought many negative impacts to the industry. One interviewee said: "For a long period of time, all tourism businesses had to stop, including casinos, hotels, travel agencies,

airlines, logistics, and restaurants” (Interviewee 7); another noted, “Tourist numbers dropped and hotel occupancy rates decreased from 90 percent to 20 percent” (Interviewee 6). In addition, “No group tours are allowed to enter Macao, leading to the unemployment of our tour guides and employees” (Interviewee 5). All these factors have caused uncertainty in the tourism sector and stress among the employees.

The stress and uncertainty also come from changing border mobility and travel visa policies, which rest mainly in the hands of the Central Government and to which Macao can only respond passively. To prevent spread of the virus, the Central Government discouraged people from traveling abroad. Therefore, during the Chinese New Year festival in January 2021, Macao did not receive its usual high volume of visitors from China. Instead, some mainlanders travelled domestically within China and some went to shop in the duty-free shops in Hainan (China) (Interviewee 8). The interviewee from the government expressed her concerns on this matter:

It is a headache for us. The maximum amount mainlanders [are] allowed to spend in Macao per trip is only MOP5,000 (US\$625). Buying a bag already exceeds this amount. So, why do they come? This has serious negative impacts on development of our retail industry (Interviewee 1).

#### 4.2. Role of government and crisis leadership in Macao’s tourism recovery

In handling the crisis, there is a clear hierarchy and structure as to who is responsible for what. The Central Government of China decides the opening/closing of the border between Macao and Zhuhai (where most Mainland Chinese visitors enter Macao), as well as the travel visa issuance policy in China. On many occasions, Macao’s Chief Executive (CE) underlined that these matters are for the Central Government and not for the Macao government, and therefore no one can go against the Central Government’s absolute authority and decisions on such matters (Interviewees 1, 5). The CE receives policy directions from the Central Government, instructing local government secretaries to follow them, including discussing and collaborating with stakeholders in the tourism industry.

Interviewees considered Macao’s CE to be efficient and decisive in managing the crisis. In February 2020, when Macao’s first ten coronavirus cases were identified (among whom was a local hotel worker), the CE ordered all 41 casinos to close for 15 days. The CE said, “This is a difficult decision, but we must do it for the health of Macao’s residents” (Stevenson, 2020). The government, led by the CE, was also perceived to be doing a great job in protecting the health and safety of locals in an immediate and speedy manner (Interviewees 7, 8). An interviewee stated:

The government immediately searched for masks worldwide and sold them to us at a very low price. The government also supports local retail firms to produce masks and then buys back their masks. Government departments distribute the masks, set up health codes, and communicate with casino gaming operators in a speedy and organized way. Everything is fast and coordinated (Interviewee 8).

The CE also demonstrated proactive behavior to convey messages to the public on different occasions regarding the seriousness of the virus and asked the public to treat it cautiously and seriously. Some interviewees also praised the CE for showing great empathy to the local people. Apart from the provision of masks, the CE also implemented electronic consumption vouchers (MOP\$5000/USD624) for local people to stimulate the local economy. The consumption scheme successfully encouraged people to spend more in the supermarket, as well as buying electronic appliances, dining, enjoying their staycation in hotels, and joining local tours (Interviewees 1, 5, 6, 8). The CE also launched a series of measures to assist local tourism businesses. These included:

giving free parking for taxis and lorries to park in the Hong

Kong–Zhuhai–Macao bridge area, offering subsidies to businesses, such as MOP50,000 [US\$624], MOP100,000 [USD12,480], MOP200,000 [USD24,960], providing loans to local people (MOP600,000–MOP2 million) [USD74,880–249,600], and organizing promotions and activities in different areas of Macao to boost sales. The CE once said, “If we don’t spend at this time, when should we spend?” (Interviewee 8).

The CE also channeled the views of tourism businesses and made requests to the Central Government (Interviewees 1, 5, 8). Matters discussed included the period to allow group tours to enter Macao, and relaxing travel restriction policies (Interviewees 4, 5, 6). Although very often the outcome was unfavorable for tourism operators, most of the interviewees appreciated the CE’s efforts and understood that a lot of things were outside his control.

#### 4.3. Public-private partnerships in post-COVID tourism recovery

COVID-19 has dramatically transformed the landscape of Macao’s tourism industry, given the change in market demand and tourist behaviors. To gear up for post-COVID recovery, PPPs need to respond to dynamic market demands and formulate appropriate policies and tourism products in a structured process.

##### 4.3.1. Step 1 – problem setting

The first stage of collaboration is concerned with problem setting, which involves the definition of common problems and recognition of the interdependence and consensus of legitimate stakeholders. The common problem during COVID-19 is obvious: the traumatic impacts of COVID-19 are indisputable, with unprecedented devastation in the entire tourism sector.

I found the impact of COVID-19 profound and enduring in terms of its scale. It is profound in its severity, as most tourism operations were brought to a complete [halt]. The pandemic is also enduring as it has lasted for more than a year, and there is still no sight of it stabilizing around the globe. I do not expect things could go back to the way they were before (Interviewee 7).

In addition, there are challenges that pertain to changes in market demand. Health security emerged as a new essential dimension in tourism offerings (Interviewee 7). Thus, tourists need to be assured that the possibility of getting infected is low when visiting Macao. COVID-19 also catalyzed changes in market preferences: to avoid exposure to crowds, independent travel, dominated by the younger generation, is preferred over traditional group tours (Interviewee 1). Quality remains paramount, more than ever: tourists prefer to stay longer and enjoy slower and more in-depth experiences in order to savor the destination (Interviewee 7).

The tourism sector realized that the pandemic was too huge a problem for any individual participant or sector to tackle and thus collective actions were required. Practitioners now recognize and appreciate the interdependence among different players in the industry and the government. While the tourism sector relies on the government for leeway to survive and operate during the strict pandemic restrictions, the government also needs to seek industry’s understanding and cooperation to control the pandemic and keep their staff employed.

The Macao government has made a great effort to boost local events during the pandemic ... We [the event industry] have also organized a few forums and a trade fair during this period. We [industry and government] worked together to get some work done and lay the groundwork for the event sector during this difficult time (Interviewee 3).

The shared hardships during COVID-19 boosted tourism practitioners’ collective sense of urgency to survive and recover. Achieving such a consensus laid a good foundation on which to build partnerships. Therefore, stakeholders are brought together to discuss and ultimately act upon the remedies together. “It is not easy for us to explore new markets. The government has helped a lot to bring us together—not only the event industry, but the overall tourism sector—to visit potential markets and promote broad-spectrum cooperation opportunities”

(Interviewee 2).

#### 4.3.2. Step 2 – direction setting

The second stage of collaboration focuses on direction setting, which aims to develop concrete solutions through establishing goals, setting ground rules, and exploring options. Combating COVID-19 was regarded as a national security issue, and pandemic preventive measures and a goal of zero infection were set as top priorities for China and Macao. This common goal brought stakeholders together to work collaboratively on plausible solutions despite disparities in their backgrounds and sectoral interests. This further motivated the industry to deliberate on evolving market demands, make changes, and adapt to the new environment for survival.

We still have to make a living during the pandemic ... so we reflect on the positioning of Macao's event industry. We are not good with exhibitions due to our small population and homogeneous industry, so why don't we switch to trade fairs? It is simple and requires less time and resources (Interviewee 2).

Common goals also inspire stakeholders to support and comply with the government's anti-epidemic measures. The severe COVID-19 outbreaks in neighboring cities alarmed the stakeholders and reinforced their determination to safeguard Macao. Only when Macao stayed clean and safe could it secure Mainland Chinese tourists and explore new opportunities. To facilitate the achievement of common goals, some ground rules emerged during the COVID-19 tourism crisis. For example, significant travel restriction policies were to be decided and controlled by the Central Government. Therefore, different stakeholders took various routes to convey their concerns and requests to Beijing.

[In seeking that the Central Government loosen the ban on tour groups to Macao] we have done everything we could ... we have used every means to find whomever we could to raise our voices, but the State Council needs to take into consideration different aspects (Interviewee 1).

In addition, the government showed its determination to control the pandemic's spread, including a ban on cross-border travel, temporary closure of casinos and public facilities, and suspension of classes and work. Interviewees noted that the industry needs to be prepared for short-term inconveniences and pain when the pandemic situation worsens.

Although our members are mostly tour guides, we think tour groups pose great threats to Macao, and should not be allowed too soon ... If there is one infected case in a tour group, we will have to quarantine at least 30 close contacts. What if two or more groups have infected cases? Macao's hospitals just do not have the capacity to handle the situation (Interviewee 4).

Government and industry practitioners then explored various strategic directions, including the development of the domestic market, exploration of collaborations with the neighboring Greater Bay Area (GBA), and the utilization of digital technology. The government took a leading role in subsidizing development and promotions, introducing GBA partners to local corporations, and investing in digital platforms. These measures were well received by the industry, that sought to sustain its operations and pave the way for future development.

When you are in survival mode, you will use all your creativity and energy [to cope with the situation]. Life was just too easy and comfortable before, which made us lazy. In a pandemic, we cannot be lazy anymore. We need to think about solutions; it is a challenging task (Interviewee 1).

#### 4.3.3. Step 3 – structuring

The structuring stage of collaboration involves the operationalization of recovery measures, including formalizing relationships, roles assigned, and tasks elaborated. In response to the COVID-19 pandemic crisis, the cross-departmental Joint Prevention and Control Mechanism Team (JPCMT) was established, whose members include high-ranking officers appointed by the Chief Executive. The JPCMT assesses the

pandemic situation, coordinates work at different levels, and communicates relevant news and policies to the public. Press releases have been broadcast regularly through centralized news outlets.

In a PPP collaboration, it is essential to devise a systematic regulatory framework to assign the roles and tasks of stakeholders. As Macao's DMO and a government agency, the MGTO holds dual roles of gatekeeper to suppress the pandemic and promoter to boost tourism recovery. Due to pandemic concerns, the MGTO canceled traditional tourism activities, including the International Fireworks Competition and the Chinese New Year Parade. At the same time, the MGTO subsidized local group tours and staycation packages for the domestic market. These activities were appreciated by the community and acted as a lifesaver to ease the distress of the tourism sector.

In addition, the MGTO served as the link between tourism sector stakeholders and the Macao government. This role included disseminating and explaining the latest pandemic guidelines and policies related to tourism practices, and eliciting opinions of the industry to refine future policy-setting. The MGTO also contributed to lobbying the Central Government for an appropriate tourism policy for Macao through a strategic approach.

Chinese tourists still love to visit Macao ... We need to publicize Macao's anti-pandemic efforts and promote Macao as a safe destination for traveling. When people feel reassured, their confidence in Macao will be restored. Then we will have more bargaining chips to relax the tourism restriction policies. This is a slow and gradual process (Interviewee 1).

For the private sector, key players such as hotels, travel agencies, event organizers, and retail operations formed close connections through various associations. These influential associations communicate regularly with the MGTO and other government departments to articulate members' concerns and provide feedback and opinions on policy setting. In return, the government gains support from these key players for its anti-pandemic engagement. The communication process is smooth: most stakeholders acknowledge the government's efforts and show understanding and resolution to stand together with the Macao government. Trust has been developed through the government's ability to control the pandemic, effective allocation of resources, and honest communication across all levels.

We had two meetings with the Secretary of Economic Affairs [top-ranked government official], not to mention various meetings with the Macao Trade and Investment Promotion Institute. They sincerely asked us what they could do for the industry ... With good intentions, we understand that it takes time and effort to launch the regulations, especially where there are multiple concerns (Interviewee 2).

At the same time, members of the private sector branched out through their own connections. Some association leaders who are representatives of the Chinese National People's Congress also voiced industry's concerns and proposed appropriate policies during the annual meeting in Beijing. Others sought partnerships to explore new markets and collaboration opportunities, such as the staff exchange program between a local Macao hotel and a GBA hotel chain. During the crisis, associations and individual business operators exercised self-help and mutual help processes through PPPs within the legal boundary (Fig. 3).

#### 4.3.4. Step 4 – outcomes

**4.3.4.1. Programs.** As Macao gradually reopened its borders, a noticeable change in demand was detected compared to the pre-COVID-19 period. Therefore, the MGTO and industry associations put forward a series of policies and measures for recovery (see Fig. 4), prioritizing the recovery of the economy, securing employment opportunities, and enhancing residents' livelihoods. In the tourism sector, these principles were similarly reflected in terms of "expanding visitor sources, reviving the economy, and securing employment opportunities" (Interviewee 4).

**Ensuring Safety.** To make sure that tourists feel safe, the MGTO

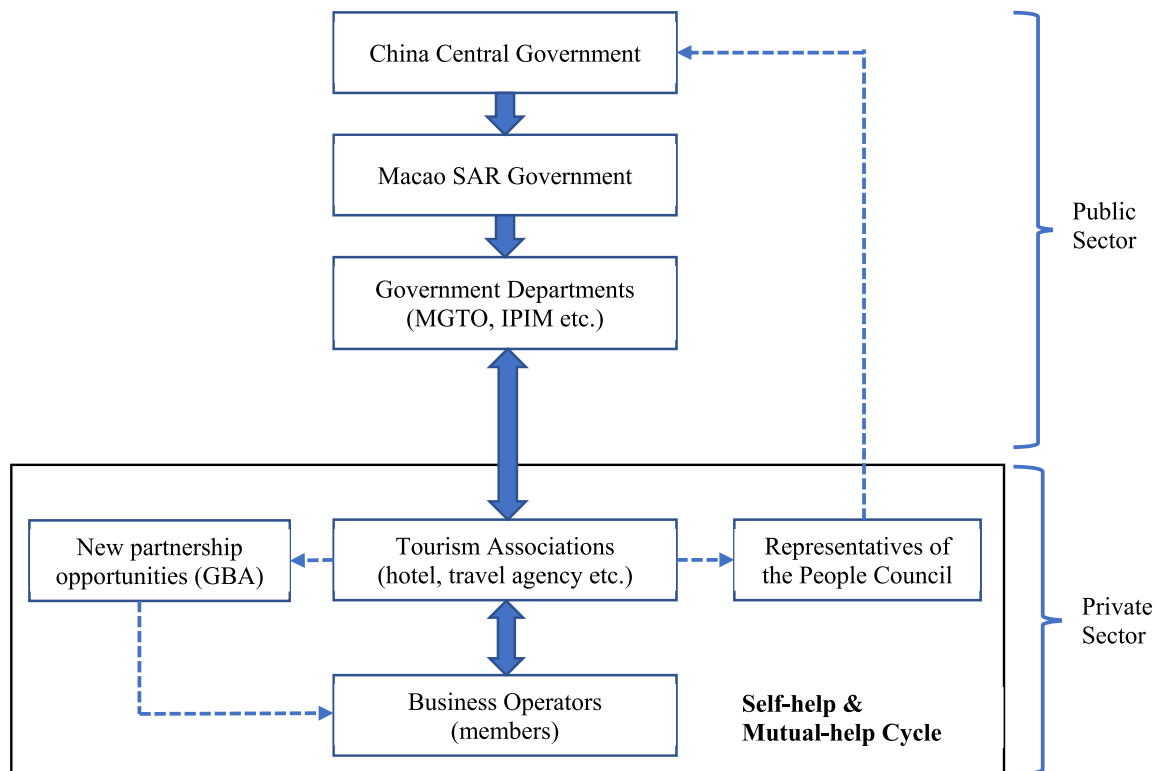


Fig. 3. Role and tasks assigned among stakeholders.

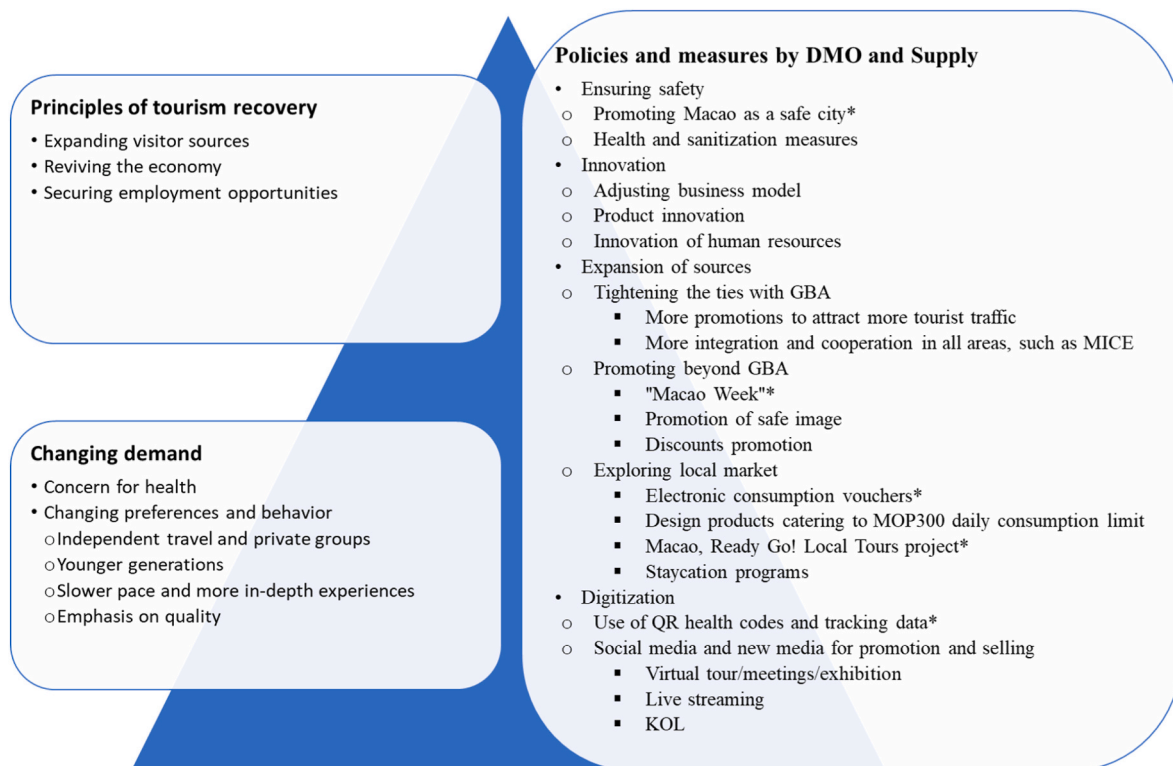


Fig. 4. Changing market demands and tourism recovery strategies through PPP.

promoted Macao as a virus-free destination and fostered the image of a safe city. Information was disseminated to make potential tourists aware that Macao is “very safe and there is no need to be concerned” (Interviewee 1). In addition, health and sanitization measures became

common practices for public or private properties. “So public health and tourism safety management must be prioritized to boost consumer confidence. At this moment, all industries are taking safety and sanitization measures, such as providing hand sanitizer and implementing mask-



wearing mandates” (Interviewee 7).

**Innovation.** In response to shifts in demand, adjusting business models and innovating products have become critical for survival and recovery. The MGTO and industry associations realized that to survive, they needed to be able to propose policies and craft new, unique, customized products to cater to the changing demand. For example, under the direction of the MGTO, tour operators developed 25 new itineraries/products in 2020 and a series of private tours in 2021, among which a helicopter ride became the star attraction.

But now the mentality is that if I cannot figure something out, there will be no tourists coming in, which becomes an impetus for product innovation. That is why the industry has come up with 25 routes. Even chatting with the airline pilot can be turned into a product, which you could not imagine prior to the pandemic. Or helicopter commuting between Macao and Hong Kong has now become a tourism attraction as well. So, in order to survive, you must think and innovate (Interviewee 1).

Along with product innovation strategies, regearing of human capital is inevitable. Tour guides in Macao principally acted as sales leaders when tour groups were abundant. With the changing market, they now need to resume their principal role as tour guides. This requires renewing and updating their guiding skills and storytelling tactics, and, most significantly, becoming experts in the history and culture of their home.

We must reinvent ourselves and reclaim our profession. ... As a representative of Macao, we should be able to lead visitors to explore the city, to tell the story of our city. We should not just take visitors to the St. Paul’s ruins for 15 min of photography and then send them shopping. No, we also want to take them backstage, to see the insides, to the less well-known alleys, which are full of stories. And we need these (Interviewee 5).

**Expansion of Visitor Sources.** Early lockdown impelled Macao to explore the consumption potential of its residents. But when Macao reopened its doors, partnerships were undertaken to promote to other source markets, including exploring the local market and strengthening ties with GBA cities and beyond.

Under the umbrella of several subsidies to revive the economy and enhance livelihoods, the MGTO and tourism operators voluntarily or involuntarily turned their attention to residents. For example, two rounds of electronic consumption vouchers were distributed to all residents to stimulate retail consumption, restaurants becoming one of the big beneficiaries when they managed to create set meal valued at about MOP300, the daily consumption limit (Interviewee 6). The “Macao, Ready Go! Local Tours” project and staycations with major resorts and hotels represented another joint effort. The industry is highly appreciative of the government’s stimulus schemes, which also encouraged practitioners to tap the local market.

Since only Macao residents can come to spend during the epidemic, how could we get all Macao residents to come to try the hotel, which is something I’ve been working on. For example, on International Women’s Day, when Macao residents come to dine with us, we will give a complementary cocktail. I am hoping they can promote us by posting on WeChat or Facebook (Interviewee 6).

Macao has traditionally relied on GBA cities, as more than half of Macao’s visitors come from the GBA, which is only a border away (Interviewee 6). Naturally, the area has been prioritized for increased visitor traffic with discount incentives. The integration does not stop at attracting more tourists: it also extends to all tourism businesses such as the meetings, incentives, conferences, and exhibitions (MICE) market. “After all, Guangdong Province has a population of 100 million, which is huge” (Interviewee 2). Within the GBA, further exchanges of talents, such as tour guides and college students, are called for. Concerns about the different legal and political systems have been raised as barriers to more effective integration.

For example, now, some of our tour guides can work in Hengqin but not in other GBA cities. I believe we can broaden the policy to allow

Macao tour leaders to work as tour guides in other GBA cities as well (Interviewee 4).

Additionally, the MGTO launched a series of roadshows, “Macao Week”, in cities beyond GBA, such as Beijing and eastern coastal cities like Hangzhou, Nanjing, and Shanghai. Apart from promoting Macao as a healthy and safe destination, quality has been brought to the forefront in these roadshows. Along with innovations in product offerings, government-subsidized discounts in air travel were utilized to stimulate demand by the industry partners.

**Digitization.** Tourism recovery would not be possible without technology. Firstly, technology is used to control the virus with the use of QR health codes and tracking data. Secondly, social media and new media are now major sources of information for travel decisions. Chinese tourists take advantage of digital media from trip planning (virtual tours and videos) to booking (digital payment platforms) and to enjoying the journey itself (sharing on social media platforms). Therefore, online commercial communications are becoming more prevalent. As for Macao, the pandemic accelerated the acceptance and adoption of online transactions.

Those who used to believe online transactions were unnecessary turned down the opportunity. During the pandemic, I see some people went from active rejection to passive acceptance, then active acceptance, and finally active embrace (Interviewee 7).

Online travel agencies (OTAs) in Mainland China are used by the MGTO and the industry to promote and sell the destination and their respective properties and attractions. They are also augmenting their online touchpoints and experiences. For example, virtual reality and high-definition videos are used to provide viewers with audio and video experiences at home. Livestreamed marketing is adopted by sharing real-time content directly to viewers, increasing viewers’ engagement. Social media influencers, also known as key opinion leaders (KOLs), should not be overlooked.

We are also promoting and selling online—for example, on Little Red Book, Douyin—in the hope of attracting tourists to try our food or come to our hotel (Interviewee 6).

KOLs are becoming increasingly popular in retail, particularly among major brands. Because tens of thousands of people wish to purchase but are unable to come to Macao, they need KOLs to visit the store and look around, and to try on items to demonstrate to the viewers [potential buyers] (Interviewee 8).

**4.3.4.2. Impacts and benefits derived.** The collective efforts between the MGTO and the industry have resulted in a steady increase in tourist arrivals and gaming revenues. The “Macao Ready Go! Local Tours” project drew more than 144,000 local participants and generated over 56 million patacas (7 million USD) in economic benefits (Macao Government Tourism Office, 2020), aiding the revival of tourism activities in Macao and maintaining the livelihoods of travel agencies, tour guides, and tour bus drivers. The policies and measures adopted have shifted the industry mindset, enabling it to be more innovative in redesigning or developing new products and itineraries that serve not only residents, but also tourists. The MGTO and the industry have become more aware of changing visitor preferences and behaviors, allowing it to customize tourism products for more segmented markets. Finally, the pandemic has accelerated technological adoption, opening new opportunities for Macao’s tourism industry.

**4.3.4.3. The crisis leader adjusts his strategies in response to outcomes.** Macao’s chief executive closely monitored the pandemic situation to adjust his policies and measures. For instance, considering the escalating number of confirmed cases in some places in Guangdong province in May 2021, the CE requested that all visitors coming from these places pass a nucleic acid test with 48-h validity before they could enter Macao (Interviewee 7). In June, when the situation was coming under control, the validity period was extended to seven days (Macao Government

Information Bureau, 2021). In addition, realizing the successful implementation of the first round of electronic consumption vouchers, the CE approved a second round in June 2021 with a higher amount per person of MOP8000 (US\$1000). Furthermore, to assist local tourism businesses, the MGTO, upon the approval of the CE, has continued to design projects and has invited tourism partners to participate (Interviewee 4). For example, tourism business operators were invited to participate in the MOP120 million (US\$14,976,000) “Stay, Dine, and See Macao Project” in April 2021 (Macao Government Tourism Office, 2021). It is through complying with the policies and measures of the authorities in mainland China, while continuously monitoring the pandemic situation, listening to the community’s needs, and encouraging partnerships, that the CE can adjust his strategies to help rejuvenate the city’s tourism industry.

## 5. Discussion, implications and limitations

### 5.1. Discussion

The COVID-19 outbreak triggered Macao’s tourism stakeholders to respond by creating a PPP form of governance. However, PPPs do not always guarantee success due to inconsistent expectations and contributions among different parties. In this study, the collaboration achieved between the public and private tourism sectors in Macao illustrates one way to combat COVID-19 and recover from it. Yet the success of this partnership is due not only to its close-knit development and step-by-step approach, but also the timely intervention of the Macao government and its crisis leaders in guiding and fostering the partnership. Prior studies on PPPs suggest that partnership arrangements are often forged during non-crisis periods or for developmental purposes (Graci, 2013; Selin & Chavez, 1995), but in times of exceptional crises such as COVID-19, the government and its crisis leaders become more galvanized in fostering public-private cooperation. In the case of Macao, it is evident that the crisis leader (Macao’s CE) fostered the partnership by establishing a clear communication structure and guidelines, encouraging government bureaus to communicate and collaborate with the tourism businesses, channeling their views to the Central Government, and devising recovery schemes. The crisis leader also adjusted strategies in a timely manner by reviewing the crisis, listening to feedback, and monitoring partnership outcomes.

Common goals are the glue that hold public and private actors together. It is not easy to set goals that all parties agree on, especially when it entails sacrifices of different sorts and to different extents (Tosun, 2001). Echoing the study by Graci (2013), stakeholders operate independently and contribute to the common goals within their capacity; individual differences can be resolved constructively when focusing on the overall benefit. After setting common goals, public and private sector participants structured their roles and responsibilities. However, collaboration was based on dynamic processes rather than a legal structure: there was no explicit segregation of duties, and the mode of collaboration was subject to various formal and informal connections. It was therefore vital for the stakeholders to take joint ownership of and responsibility for the collective decisions regarding actions aimed at the destination’s sustainability (Graci, 2013).

With the government taking a decisive role, industry stakeholders became very cooperative in working toward the common goals of survival and recovery. Although still a top-down governance approach, trust was established because of the government’s transparent communication along with the government’s demonstrated competence in handling the pandemic. The outcomes are therefore positive. The detriments to the tourism industry are minimized and destination resilience built (Liu et al., 2021). As suggested by Sigala (2020), the speed of recovery is dependent on how the stakeholders respond to the crisis. Although visitor arrivals and gaming revenues have not yet reached the desired levels, signs of quick recovery are encouraging. While not a panacea, when properly managed, PPPs can be an effective instrument for solving difficulties and attaining shared goals (Selin & Chavez,

1995).

### 5.2. Theoretical implications

The findings of this study contribute to the literature in several ways. Firstly, this study illustrates how a PPP style of governance can help the tourism industry to recover from a pandemic or other crisis. Through the interdependent relationship between the tourism industry and, in this case, the Macao government, effective crisis leadership, together with the willingness of the tourism operators to collaborate, led to the formation of a functioning PPP to combat pandemic effects and recovery efforts. Utilizing Graci’s (2013) PPP model, this study shows how tourist destinations can utilize PPP through several stages of problem setting, direction setting, and structuring. The step-by-step PPP formation brought positive outcomes and benefits and enhanced the resilience of tourism organizations and destinations in a crisis situation, allowing them to bounce back incrementally (Paraskevas et al., 2013, p. 130). The study also identified several critical components of a coherent partnership, including common goals, the structured role of each partner, and effective and dynamic communication network in place. These success factors can guide future public-private partnerships. By applying the perspectives of PPP and collaborative governance, the study allows policymakers and stakeholders to reframe and reinterpret situations, impacts, and outcomes, and to redirect actions and strategies (Sigala, 2020).

Secondly, this study contributes to understanding the crucial roles played by the government and crisis leadership in managing the COVID-19 pandemic. Speedy tourism recovery rests upon government interventions and its leadership to guide and foster PPPs. Prior studies underscore the crucial role governments play in a partnership (Pierre & Peters, 2005; Vargas, 2020). Findings also echo prior studies which contend that having a good crisis leader is essential for any crisis management (Foster et al., 2020; Mitroff, 2004; Wardman, 2020). The ability of Macao’s Chief Executive to channel people’s views to the Central Government and receive policies from the Central Government and disseminate them to different levels of the Macao local government for execution and coordination were key attributes of the crisis leadership. Another important attribute is the leader’s timely adjustment of strategies by listening to the needs and feedback of the community and monitoring the situation and strategy outcomes.

Despite COVID-19 being a serious crisis, it can also be an opportunity for the tourism industry (Liu et al., 2021; Sigala, 2020; Vargas, 2020). The case of Macao illustrates how the pandemic has changed the mindset of the tourism industry, enabling it to be more innovative in developing new products and strategies. The MGTO and the industry became aware of changing preferences and behaviors, allowing them to customize tourism products for more segmented markets. Furthermore, the pandemic accelerated technological adoption, opening new doors for Macao’s tourism industry. Tourism operators and destination managers can therefore face crises successfully through a PPP approach.

### 5.3. Practical implications

These findings offer practical implications for destinations striving to recuperate from the pandemic. Firstly, during an unparalleled crisis like COVID-19, leadership should act in a speedy, honest, and proactive fashion and offer practical guidance to reassure people. When the population is generally suffering from physical, mental, and financial distress from the pandemic, leaders need to lead with empathy, putting themselves in others’ shoes (Wardman, 2020). Leaders could, for example, share their concerns and thoughts and update the public via regular press conferences.

Secondly, crisis leaders should be more active in identifying potential partners who wish to form partnerships for local economic and tourism revival. Governments may set up task forces to help bring these potential partners together and offer them some policy and incentive supports.

Thirdly, developing common goals and a common direction is particularly important. Clear and shared objectives unite different sectors and give direction to the PPP. In Macao's experience, adherence to common goals was achieved by frequent communication of pandemic information and experts' opinions. Clear communications based on trust will aid mutual understanding and expedite the structuring process among public and private stakeholders.

#### 5.4. Limitations and future research

The study has several limitations. Firstly, interviews were conducted during the early recovery stage of the pandemic. Strategies and measures may change over time and prompt the formation of other types of partnership. Future research could look at how partnerships evolve in different recovery stages. Secondly, the study only involved the public and private sectors. Other stakeholders such as residents could be included in future research. In addition, this study focuses on the case of Macao. Extending the investigation to a global comparison of tourism recovery schemes could enrich understanding in different contexts. Finally, qualitative research is subjective in nature. Results should be interpreted with caution and are not intended for generalizability.

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#### Declaration of competing interest

All authors declare they have no conflict of interest.

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