

Louvain School of Management

The Impact of Covid-19 Pandemic on The Hospitality Sector in Belgium

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ABSTRACT

The Covid-19 pandemic which originated in Wuhan, China in December 2019 soon spread to the entire globe. The Belgian regional and Federal governments undertook several measures to stem the spread of the virus. The first lockdown and curfew was imposed on 15th of March 2020. This immediately impacted many businesses like the hospitality sector. This thesis therefore examines the impact of the pandemic on the hospitality industry. We argue that the pandemic decimated the accommodation and food services sector because the mobility of people was halted. The study focused on the effects of the pandemic on the hospitality industry and the workers. A multi-prong approach was adopted as the research methodology of this study. Firstly, we utilised the qualitative approach in the collection and collation of data. We administered seventy questionnaires to business owners, managers and general staff of the sector. However, only fifteen responded. This was a potential problem for the study. Nonetheless, we also relied on a few interviews and secondary data to overcome the hurdle. The findings revealed the extensive impact of the coronavirus crisis on the hospitality industry: loss of revenue, job losses, lay-offs of temporary workers, mental health crisis and increase in poverty and inequality. These findings were substantiated by some secondary literature on the repercussions of the pandemic on Belgian workers. Nonetheless, other companies were able to survive and came out of the crisis almost unscathed. The digital sector was among the most robust and prosperous during and after the pandemic.

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FOREWORD

I would like to express my sincere gratitude to my supervisor Prof. Philippe Depeape for his valuable and expert suggestions for structuring this thesis. I would like to thank my mother and my siblings for all the support, encouragement and for believing in me. I owe thanks to a very special person, my husband, Eric for his continued and unfailing love, support and understanding throughout my studies. I would like to thank my children who brought a lot of beautiful memories fill with challenges and happiness throughout this journey, I will make them the proudest and will always be there for them.

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CHAPTER ONE

GENERAL INTRODUCTION

1.1 Introduction

The ongoing COVID-19 pandemic has disrupted social and economic activities globally with the hospitality industry being harmed the most due to its vulnerability (Alonso et al. 2020). The highly contagious nature of the virus and the barrage of restrictive measures that were erected by states and local authorities across the globe to combat the spread of infections dealt a severe blow to the hospitality industry. Three years after the first outbreak, the virus has become so recurring that news about the number of infections rising this summer has become prevalent with a heightened sense of uncertainty for businesses, local authorities and customers of hospitality products and services. This study is therefore set in a context of complexity and potential for rapid change.

1.2 Background to the study

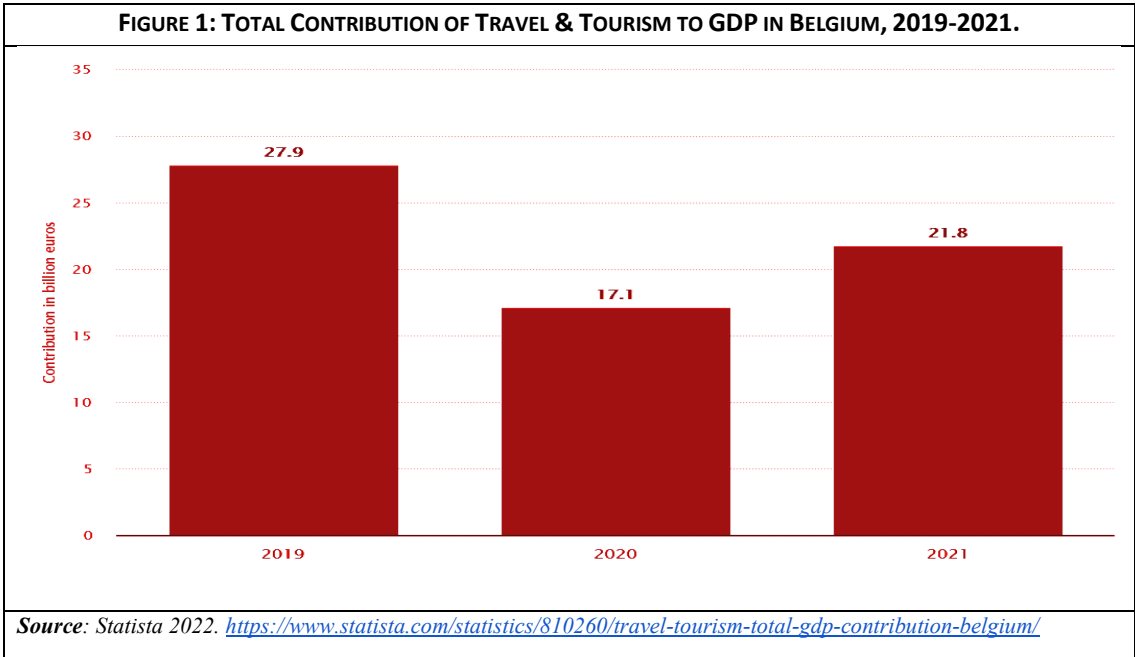
The hospitality sector is defined in this thesis "to encompass all services linked to accommodation or lodging (Hotels and Airbnb), travel and tourism (airports), bars, restaurants and the catering service which are commonly grouped under the abbreviation HORECA (Hotel, Restaurants and Catering). According to the Organization for Economic Cooperation and Development (OECD, 2022), Belgium's tourism is under the authority of three regions: Flanders, Wallonia, and Brussels respectively. Before the pandemic, in 2018, tourism's direct contribution to the Belgian economy stood at 2.3% of total GVA (Gross Value Added) in Belgium while in the tourism sector employment accounted for 6.7% of the total national employment.

In essence, unlike other sectors of the economy, the HORECA sector is mostly a labour-intensive service sector - with most of the employment in the restaurant and catering sector generally in small and medium-sized companies. In fact, the hospitality sector in Belgium is amongst the top three sectors in the country's predominantly service-based economy which accounts for the bulk of employment and GDP.¹

¹ The European Commission (2022). Labour market information: Belgium., https://ec.europa.eu/eures/public/living-and-working/labour-market-information/labour-market-information-belgium_en

The sector is therefore very vital to the national and local economy yet extremely vulnerable to economic shocks and long-term restrictive measures. The latter was the core public health response to the COVID-19 pandemic and these measures specifically targeted the HORECA sector in Belgium resulting in very negative economic and social costs for the sector in particular.

Moreover, prior to the outbreak of the pandemic, the value of tourism to the Belgian economy was 27.9 billion euros in 2019. After the pandemic, the value fell by almost 10 billion euros to 17.1 billion euros (Statista Research Department, 2022) as seen in the graph below:



Belgium’s domestic tourism market was also performing very well with spending over 18 billion in 2019 on domestic travel trips. Before the pandemic, Belgium received 6.7 million international tourists and of that figure, 3.2 million visited Flanders ranking it Belgium’s most visited region. Other sectors of the hospitality industry like restaurants, bars, and cafés tended to do well prior to the pandemic (Statista Research Department, 2022).

Nonetheless, since we live in a world with uncertainties and crises, which have been from the beginning of time either man-made or natural, pandemics, earthquakes, and wars are apparent. Increases in these catastrophes have led to negative consequences threatening the Hotel

industry (Ritchie 2004). According to Gleasser (2006), The root cause of these catastrophes can be linked to wars, terrorism, the environment, and economic and political upheavals.

The hotel industry in particular has faced many crises and disasters in recent years including epidemics, natural disasters, wars and economic recession. These crises led to the economic recession which had a huge impact on the hotel industry globally (Ritchie 2004). An illustration can be seen in the time of the Global Financial Crisis (GFC) where the prices of hotel rooms dropped on average by 14% globally (Campiranon & Scott 2014) and during the Severe Acute Respiratory Syndrome (*SARS-1,2*) outbreak, restaurants turnover decreased significantly due to restrictive measures banning the eating of in public places (Alan et al., 2006). Since crisis management has become the best way to respond to all these situations above, it is, therefore, pivotal to investigate the impact of these measures at a more national scale - hence the necessity of this study.

1.2 An overview of the Covid-19 Pandemic

The COVID-19 pandemic is a global health crisis that was caused by the coronavirus. The coronavirus infection disease is caused by the severe acute respiratory syndrome coronavirus 2 (*SARS-Cov-2*) virus.² According to WHO, COVID-19 started in late 2019 when China reported an epidemic in December of 2019 with an unknown cause and the Coronavirus was first identified in Wuhan, a city in China. From there it spread to almost every country in the world and on 11 March 2020 the WHO declared Covid-19 a worldwide pandemic and now it has become a new public health crisis (WHO 2022). As of July 2022, there have been over 550 million cases with more than 6 million deaths making the coronavirus pandemic one of the most deadly pandemics ever (Morens, 2020). In the European Union (EU) area, over 2 million people died from this disease.

People infected with the virus will suffer some respiratory illnesses and recover without special treatment requirements while others will require intensive treatment especially those with underlying medical conditions like diabetes, chronic respiratory disease, and old people (WHO). The virus is transmissible through an infected person's mouth or nose in small liquid particles when they sneeze, cough, sing or even talk.

² WHO (2022). Severe Acute Respiratory Syndrome (SARS)., https://www.who.int/health-topics/severe-acute-respiratory-syndrome#tab=tab_1

In order to reduce the number of infections, all over the world, national and local governments/authorities in power took other public health, economic and social measures. These interventions were meant to contain the spread of the virus in an attempt to reduce the adverse effects of the COVID-19 outbreak. Most governments imposed various restrictive actions like the closing down of schools, shutting down some offices and businesses and encouraging workers to work from home, suspension of public gatherings, requiring social distancing, and wearing of masks in public places, lockdowns and closing of borders, amongst many others.

The United Nations World Tourism Organization (UNWTO 2020), stated that the world economy came to a standstill almost overnight due to the sudden outbreak of COVID-19 towards the end of December 2019. In Europe, cases rose rapidly daily, with Italy becoming an epicentre of the crises - recording an unprecedented number of deaths within 24 hours in the month of March. The high mortality rates resulting from the impact of the pandemic on Europe's predominantly older population led the WHO to declare Europe as an epicentre of the pandemic.³

In Belgium, around mid-March of 2020 the government announced strict lockdown measures to be able to contain the first wave of the COVID-19 pandemic. As a result, movement and businesses were seriously impacted. The most severe impacts were especially and directly felt in the hospitality industry - with unprecedented declines in their services due to strict government restrictions that disrupted the working condition in this sector (Dhyne & Duprez, 2021). These lockdowns especially in March and October 2020 had far-reaching repercussions on the hospitality industry.

1.3 Problem statement

The hospitality industry is considered one of the most important sectors in the world's economy due to its direct and indirect impact accounting for more than 10% of the global GDP prior to the pandemic (WTTC, 2020). This sector was and still is seriously affected by the outbreak and the spread of the coronavirus. The sector was affected in more than 200 countries and as a result, prevented people from travelling which in turn negatively affected the sector. As a result, many scheduled tours and flights were cancelled due to closed borders and lockdowns which many countries were experiencing. With all these happenings and

³ <https://www.voanews.com/a/who-europe-now-epicenter-of-covid-19-pandemic-/6299895.html>

according to the (WTTC 2022) prior to the pandemic, the sector was doing very well with an amount of US\$1.8 trillion spent by international visitors in 2019 but because of the pandemic, the sector made a loss amounting to US\$4.9 trillion in 2020. It is within this backdrop that we examine the impact of the pandemic on the hospitality sector in Belgium.

It is instructive to note that just like many other industrialised countries, the Belgian government undertook various measures to protect the welfare of the workers and businesses in the hospitality industry. Therefore, we attempt to investigate what specific responses did the government initiate in order to mitigate the impact of the crisis. For example, the responses included the provision of unemployment benefits to workers who lost their jobs or were furloughed. Those who worked as self-employed and who closed down their businesses due to the lockdowns were guaranteed flat rate income replacement and could postpone the social security contributions tied to the business. This study examines the problems and challenges that emerged in the hospitality sector as a result of the pandemic. It interrogates the various social policy prescriptions put in place by the Belgian government in an effort to stem the repercussions of the pandemic. Moreover, by highlighting the challenges associated with the sector, we re-examine the consequences of the crisis on the workers within the sector in their continued struggle to improve their lot.

1.4 Purpose of the study

The purpose of this thesis is to unravel the *raison d'être* for the disproportionate impact of public health measures on the hospitality sector in Belgium by examining the impact of covid 19 in the HORECA industry. In other words, to understand why and how government restrictions locally and globally affected the sector disproportionately. Moreover, the study explores the background of the advent of COVID-19 and how it affected the hospitality sector in Belgium as a case study.

1.4.1 Aims and objectives of the study

The main aim of this study is to investigate the impact of the COVID-19 crisis on the hospitality industry in Belgium.

The specific objectives of the study are:

- i) Examine the state of the hospitality sector before and after the pandemic.
- ii) Examine the role of the government incentives in propping the sector.

- iii) Use disaster management models to examine the effect of the pandemic on the hospitality sector.
- iv) Explore how uncertainties influenced the hospitality sector in the long run.

1.5 Research questions

In order to achieve the aim of the thesis, the following questions must be answered:

1. With the focus on Belgium, what is the impact of covid -19 on the hospitality industry?
2. What measures were undertaken by the government to safeguard the industry?
3. What were the recovery strategies used and the lessons learnt from the crisis?
4. What are the impacts on the workers in the accommodation and food services?

1.6 Significance of the study

The current study is important for two major reasons - the significance of the hospitality sector to the overall Belgian economy and its relevance in national and EU recovery plans. With the huge impact of the covid-19 pandemic on the hospitality industry and the vigorous intervention of the government to control the spread of the virus (Non-Pharmaceutical Interventions NPI) and using different fiscal, monetary and non-economic tools and measures to stem the consequences of the pandemic on certain crucial sectors of the economy. Moreover, the recovery of the hospitality sector is of huge significance as it may offer a roadmap for recovery to other countries heavily impacted by the Covid-19 pandemic. Moreover, despite the popular saying that all economies are unique in their localism, knowledge gotten from the findings of this study could be applicable outside of the research setting with far-reaching implications for other countries. The key contributions of the study could also be relevant to the academic community, business and other important stakeholders in the hospitality industry.

1.7 Organization of the study

The study is organised into five main chapters. Chapter one introduces the work by providing background to the study, aim and objectives of the study, research questions, and significance of the study. Chapter two discusses the literature related to the study. This chapter also introduces and defines key concepts employed in the study, related theories and how they are applied in the study. Chapter three discloses the methodology used in carrying out the research, and issues related to research design. In this chapter, the sampling technique, method and tools of data collection, data analysis and ethical considerations are also examined. Chapter four discusses the findings of the study. The findings which are mainly based on the

questionnaires are often complemented with secondary sources. Chapter five summarises major findings and the methodology, recommendations and the post-Covid 19 impact.

1.8 Definition of Key Terminologies

Covid 19 Pandemic: The covid 19 Pandemic also known as the coronavirus disease (COVID -19) is an infectious disease caused by the SARS-CoV-2 virus.

Hospitality industry: The hospitality industry can be defined and understood as an industry with businesses such as hotels, bars and restaurants that offer people food, drink, or a place to sleep.

Airbnb: It is an online marketplace that connects people who want to rent out their homes with people who are in search of accommodations in specific locations.

Non Pharmaceutical Interventions (NPI). These were the series of measures undertaken by the Federal Government of Belgium to stem the spread of the pandemic. It involved lockdowns, curfews, complete shutdown of businesses (hospitality) and arts, recreational and amusement parks among others.

CHAPTER TWO

LITERATURE REVIEW

2.1 Introduction

In this section of the study, we examine the literature on the COVID-19 impact on the economy across many countries in the world with a focus on the hospitality sector. The aim is to have a broad understanding of the relevant general and specific studies related to the impact of COVID-19 on overall business and economic performance. The chapter also stresses on the role of the Federal and Regional governments in Belgium to boost business sectors most hit by the pandemic and Non Pharmaceutical Interventions (NPI) aimed at stemming the pandemic.

Specifically, this chapter discusses the major works on the impact of COVID-19 on the hospitality sector and their relevance to the study. It also discusses new insights into the concepts adopted by the study. The concept of crisis and crisis management are defined with specific emphasis on their relevance to the study. Further, the concept of *Resilience* and principally *Non-Pharmaceutical Interventions* (NPI) are also discussed. The main idea is to open the complex field of public health interventions in crisis management and provide more insight into understanding the impacts of national and local government intervention measures on the hospitality sector.

2.2 The Concept of Crisis: Its Origin and Definition

Originally the word crisis comes from the Greek word “Krisis” meaning judgement or decision and according to (Coombs, 2007) crises are sudden and unexpected events that threaten to disrupt an organization’s operations and cause both financial and reputational threat. However, there is no single or generally agreed definition of the term in the social sciences.

For the purposes of this study, therefore, we highlight some relevant definitions of crisis set out by researchers, but adopt the definition applied by the World Tourism Organization (WTO). The WTO defines a crisis as follows: “*A crisis is an undesired, extraordinary, often unexpected and timely limited process with ambivalent development possibilities.*” (World Tourism Organization, 2011, 5). Another widely used definition by (Pearson and Clair, 1998) holds that “a crisis is a low probability, high impact event that threatens the viability of the

organization and is characterized by ambiguity of cause, effect and means of resolution as well as by a belief that decisions must be made quickly.”

To be more specific (Pearson & Clair, 1998) throws light on the similarity between all crises by defining them from a triad of perspectives - the uncertainty of impact/risk, limited time and tough decision-making. Firstly, crises are believed to be uncertain situations where the cause and effects are unknown. Secondly, crises have a low probability of occurring yet pose a severe threat to an organization and to its shareholders. Thirdly, the time to respond when it hits an organization is very short. Lastly, a crisis will always require difficult decision-making with uncertain outcomes since crises are different with some requiring immediate action in order not to escalate harm depending on the nature of the crises.

Based on the few definitions given to crises faced by many organizations it is reasonable, to sum up, that crises are events that have the potential to create significant damage, disrupt the day-to-day operation and impact the short and long term of an organization. In the same light, (Shaluf, Ahmadun & Aini, 2003) define a crisis as a situation which presents some extraordinary negative high risk to businesses except if carefully managed. In order to understand how each of these crisis function, they are categorised into internal and external crises.

Mitroff (1987 & 2004) defines a crisis as a disruption that physically affects a system as a whole and threatens basic assumptions and its existential core. He presents seven types of crises and argues that most crises can be identified within one of these groups. In an organizational context, a crisis can be defined as such “An organization crisis is a low-probability high-impact event that threatens the viability of the organization and is characterized by ambiguity of cause, effect and means of resolution, as well as by a belief that decisions must be made swiftly “ (Pearson & Clair, 1998, 60).

In addition, an organisational crisis can be seen in different forms and may look different within the whole industry. Parsons (1996) identifies three types of crises:

- Immediate crisis: from its name, there are usually limited or no warning signals before the crisis hits the organization and as such the possibility for an organization to prepare are very limited.
- Emerging crisis: an emerging crisis can be foreseen and usually it grows at a slower pace and there are possibilities an organization can stop or mitigate the negative outcome of the crisis.

- Sustained crisis: This is a long-term crisis that may be for several years within the organization.

Lastly, in order to better understand the complexities of crisis a better tool to use is crisis classification and organizations can apply this before the situation leads to a crisis.

2.2.1 Global crisis

With the world actually becoming a global village through interconnectedness and interdependence between countries/regions, an event can easily move from local to global in less than no time. While this has been particularly pertinent with events such as terrorism, climate change, the Global Financial Crisis (GFC) of 2008, et cetera these events are hardly regarded as isolated but global crises that are amplified by the reach and scope of ICT and a sense of a shared future as humans.

In fact, according to (Simon, 2008), a global crisis is defined as a crisis that spans geographical and political territories transcending ethnic and national borders such as the global financial crisis, rapid spreading diseases such as pandemics and epidemics and energy crises, food, water shortages and security. The world has experienced many major global crises such as the SARS outbreak in 2003, the global financial crisis in 2008-2009 and the COVID 19 pandemic in 2020 all in the recent decade which have all had a major impact across the global communities.

2.2.2 Organizational crisis

Organizations are bound to face a crisis and when they do it is called an organisational crisis and it is crucial to define it. In the past, many experts and authors tried to define the term organizational crisis and experts described that when a crisis impacts organisations and their members, it is known as an organisational crisis (Milburn, Schuler, & Watman, 1983). Another definition by (Pearson & Clair, 1998) states that an organizational crisis is a low probability, high impact event that threatens the viability of the organization and is characterized by ambiguity of cause, effect and means of resolution as well as by a belief that decisions must be made quickly. They also agree that those events are unpredictable. Coombs (2014) however argues that this does not mean that decision-makers should not stay without any planning but rather organizations should be aware that at some point a crisis can occur and hit them.

Coombs (2014) did a mixture where he described the organisational crisis as “the perception of an unpredictable event that threatens important expectancies of stakeholders which can seriously impact the performance of an organization and generate negative outcomes. This definition highlights the role of stakeholders since efficient and essential communication is significant across all stakeholders so that the strategies are implemented, stakeholders particularly the employees are clear about the directions and intentions of the organization (Coombs 2014).

2.3 Classification of crisis

Several scholars came up with classifications for the crisis. Naming and grouping crises are very important, especially in the initial stage of the event and to further categorising crises into specific types or forms can often help to reduce uncertainty at the initial stage. With this system of classification, crises can be seen from several dimensions such as internal, external, intentional, and unintentional (Coombs, 1995)

2.3.1 Coombs classification

Coombs (1995) classified the crisis by dividing them into different categories to the degree of responsibility of the stakeholders in those events to establish a matrix for grouping crises as seen below.

-Internal - Internal means the organization caused the crisis.

-External - It means the crisis was caused by someone or something outside the organization causing the crisis.

- Intentional - It refers to how the crisis happened, that is if the crisis was caused on purpose by actors, then the crisis is intentional.

-Unintentional - Unintentional means that no actors caused the crisis on purpose.

Burnett (1998) suggests the classification as presented in the table below.

FIGURE 1: CRISIS CLASSIFICATION MATRIX

Threat Level Degree of Control Response Options		<u>Intense</u>		<u>Minimal</u>	
		<u>Low</u>	<u>High</u>	<u>Low</u>	<u>High</u>
<u>Low</u>	<u>Many</u>	(4) Level 2	(3) Level 1	(2) Level 1	(1) Level 0
	<u>Few</u>	(8) Level 3	(7) Level 2	(6) Level 2	(5) Level 1
<u>High</u>	<u>Many</u>	(12) Level 3	(11) Level 2	(10) Level 2	(9) Level 1
	<u>Few</u>	(16) Level 4	(15) Level 3	(14) Level 3	(13) Level 2

Source: J. J. Burnett (1998), 'A Strategic Approach to Managing Crisis' in *Public Relation Review*, 24, p. 483

According to (Burnett, 1998), decision-makers face a lot of difficulties in managing and resolving crises strategically due to conditions of high uncertainty, limited control, and time pressure. He further suggests that the classification matrix is a very important tool to apply in order to understand the complexity of many crises and this can be done by organizing the matrix and approaching the different crises based on the level of time pressure and threat level. From the above matrix, the most uncertain situation is “level 4” where there is intense time pressure, a low level of control, a high threat, and a limited number of options to respond to the issue (Burnett, 1998).

To sum up, (Yang et al. 2020) highlight that the COVID 19 pandemic falls under a public health emergency with a global influence, and that it was beyond reasonable prediction and control as a result of the literature we can establish the pandemic is considered an immediate crisis.

2.3.2 Crisis Management

Crises are very common in our world today such that there are daily events that cause crises for some organisations in one way or the other. If an organization in a pre-crisis mode, is not currently experiencing a crisis, then the organization should be waiting for a crisis to occur. With the day-to-day crisis happening globally either as a result of infectious disease, wars, or natural disasters it is pivotal for every organizations and government nowadays to prepare

and practice crisis management in order to limit its negative consequences since historically we can see that no organization is resistant to certain types of crises (Coombs, 1999).

Recently there has been a lot of written literature on crisis management and (Huang, Tseng & Petrick, 2008) describe crisis management as a process of planning, coping and recovery and since crisis cannot be avoided and the cost of poor crisis management is enormous, it is then necessary for organizations to have a ready crisis management plan for unforeseen events by planning and after predicting and knowing the possible crisis, organizations should then be able to manage the crisis.

According to (Ritchie, 2004), all organizations are likely to face a new crisis and it is a matter of when and not if and how with globalization a crisis in one country can create a spill over to its neighbouring countries or distant lands. An example is the recent Russian invasion in Ukraine on 24 February 2022 disrupted the supply chain for some items and created a crisis for some companies. Therefore, it is necessary for organizations to have strategies in place for these unforeseen events. He stated that there are four stages of a crisis: “planning, preparedness, response and resolution.” Within these stages, risks are assessed, and scenarios are predicted to create a crisis plan. In a pre-crisis stage, there is a possibility of preventing the crisis through action plans while in the prodromal stage, the crisis cannot be avoided. Therefore, implementing strategies like planning and selecting the best actions and practices in any given situation is paramount in executing them through planned decision-making.

Also, (Paraskevas, 2006) suggested that organizations should make it a habit to pay attention to what is happening in their environment so that they can notice the triggers and can better prepare for the pre-events.

Furthermore, it is argued that when organizations concentrate on being crisis resilient, they build processes and systems within the organization that can assist in dealing with future crisis situations. This type of thinking and initiative leads to resilience and thoughtfulness in managers which is a good measure to determine which organization can withstand crises from those who cannot (Bundy et al., 2017).

Coombs (2007) gives the most basic definition of crisis management, and he defines it as the “process designed to prevent or lessen the damage a crisis can inflict on an organization and its stakeholders. He further breaks down crisis management into three different phases with the first phase being the pre-crisis phase, the second phase crisis response and the third and the last phase being the post-crisis phase. The first phase which is the pre-crisis phase is about

preparation and prevention which means the first step an organization should do is to have a pre-draft plan in hand which should be regularly checked. The second phase crisis response is all about the necessary actions taken by the organization when the crisis occurs and lastly the post-crisis phase takes into consideration that all the promises made to the stakeholders during the crisis are fulfilled. Coombs (2007) At the end the organization should be able to see what needs improvement and be able to integrate what was learned from the crisis into the system.

In this study, we define the crisis period as 15 March 2020 and April 2021. Therefore the period before 15 March, 2020 is the Pre-Crisis period. However, Covid-19 pandemic began in China in December, 2019 but its spread to the world was mainly noticed between January and February 2020. During this period (March 15 2020) a series of measures were put in place by the Belgian government to contain the virus. Some of these containment measures were: lockdowns, curfews, mandatory teleworking for some sectors, ban on gatherings, closure or limitation of activities of certain sectors like hospitality, cultural and recreational services, education and so on. The government also undertook a giant step toward vaccination of citizens, this began in January 2021. Relaxations on the rigid regulations started easing in April 2021.

2.4 Literature on Impact of Covid-19 Pandemic on the Hospitality Sector

The advent of the pandemic in December 2019 in Wuhan, China and its subsequent spread to the rest of the world had far-reaching consequences on political and socio-economic domains of the global order and Belgium in particular. Among the plethora of studies carried out on the pandemic's effects on the hospitality sector, there seems to be a consensus that the hardest hit industry is the HORECA. Nonetheless, this review is carried out in the following ways: the first part deals with general studies on the impact of Covid-19. The second segment focuses on Belgium. The Covid-19 pandemic and its ramifications on the economy have garnered considerable research publications. We surveyed the publications of the *International Journal of Hospitality Management* (IJHM) and *International Journal on Contemporary Hospitality Management* (IJCHM) and realised there were 33 papers that had focused on issues related to the pandemic's impact on the hospitality industry. Some of these articles centred on the effects of the pandemic on the industry: workers and management (Hao et al, 2020; Knight et al, 2020; Shapoval et al, 2021). Aspects concerning the future of the hospitality sector and its sustainability (Jones and Comfort, 2020; Bucak and Yigit 2021) and others utilised the econometrics method to analyse how demand and restaurant demands have

been affected by the pandemic. The study was able to assess how the food and accommodation industry fared after the pandemic on a worldwide basis. Moreover, the consensus derived from most of the findings of these papers revealed the debilitating effects of the pandemic on the lodging and food-service industry in the world. On another strand, some of the papers focused on the organizational problems caused by the pandemic. The majority of these studies were in the hotel sector. These studies in another sense emphasised the crisis management approach adopted by the hotels. These practices were explored by some authors (Lai and Wong, 2020; Lui et al, 2021; Smart et al 2021). Human resource aspects, control of labour costs prospects of hotel management (Agarwal, 2021; Guillet and Chu, 2021; Lai and Wong, 2020). Issues related to safety management, organisational communication, corporate social responsibility (CSR) and marketing were expressed in some journal articles. (Zang et al, 2020; Huang and Lui 2020; Im et al, 2021). These papers shed light on some of the critical fallouts of the pandemic which are paramount to this study. Many statistics were provided in various regions and countries in the world. These data helped the author in comparing the pandemic effects in Belgium against other parts of the world. Moreover, each paper outlined a specific methodology of data collection and why they held specific conclusions on the pandemic.

Heredia-Colaco et al (2021) assessed the impact of the pandemic on hoteliers' perception and strategies to recoup from the pandemic. Their findings reveal optimism among hoteliers that the sector would increase profit as from 2021 and that hotels have restructured their systems strategically in order to cope with outbreaks of pandemics or *force majeure*. Abbas et al (2021) discuss the psycho-economic effects of job insecurity during the pandemic among hospitality sector workers and highlight the social support mechanisms initiated by governments to mitigate the crisis. Gautam (2021) highlights the commonly confronted challenges faced by the hospitality sector during major crises: armed conflicts, pandemics, tsunamis, earthquakes and so on. Gautam (2021) examines the evolution of GDP in the pre-pandemic and in the post-pandemic period in certain countries with respect to the hospitality and tourism sector. The GDP contribution of the sector fell sharply during the pandemic era in 2021. Adams-Prassl, A., Boneva, T., Golin, M., & Rauh, Ch. (2020) discuss the impact of the pandemic on inequality. It is arguably one of the most in-depth studies carried out on the impact of the pandemic on household incomes and their ramifications on poverty and inequality.

The focus of some of these studies was to unpack the series of interventions undertaken by the government and how they helped in stabilizing the hospitality industry (Cantillon et al, 2021). In their work, they analysed the policy responses adopted by Belgium, Netherlands

and Germany to mitigate the covid-19 pandemic effects on workers. Cantillon et al (2021) examine social security as a major aspect used by Belgium in stabilizing consumption and helping businesses to bridge the crisis. They discuss why and how social policy was used as a focal policy response following the crisis generated by the pandemic within the economy. They also attempt to situate their study by discussing the pre-pandemic situation of Belgium, the Netherlands and Germany and the various policy responses adopted by the three states to stem unemployment within the hospitality sector. Their findings reveal that inequality and poverty were exacerbated as a result of the coronavirus shock.

Other works stress the effects of the lockdowns and detail the series of NPI adopted by many governments in 2020 to stem the spread of the coronavirus (Wahab, 2021; Johan Verbeeck et al; Fernandes, 2020). These works also examine the effects of the various lockdowns in March and October 2020 in Belgium, their impact on household earnings, GDP growth, furloughs, and income inequality among others. Scholtz and De Ridder (2021) examine the effects of the pandemic on tourism in the Flemish region. Their findings reveal the resilience of the Flemish people to readapt their needs to local tourism instead of international travels. Gyodi (2021) examines the impact of the pandemic on Airbnb and hotels in nine European cities. His findings reveal the readaptation of the sector to the major problems unleashed by the virus.

The effects of the pandemic on the hospitality sector have also been reviewed from a gendered perspective. Ella (2021) discusses the impact of the pandemic on women in Belgium. Ella argues that women in Belgium were disproportionately infected by the virus than men because they form the majority of frontline and essential sector workers hence are exposed more to the virus due to greater mobility. The majority of essential workers from the non-public health sector are in the accommodation and food industry (hospitality sector).

Some studies with a global overview were also consulted. For example, Baldwin and Evenett (2020); Astras et al (2020) concentrated on the effects of value chain supplies during and after the pandemic. They offered incisive evidence on how this disrupted the hospitality sector. Andreas et al (2020) and Golsbee and Syerson (2020) discuss the evolution of consumption habits during the pandemic and its effects on GDP.

However, as far as Belgium is concerned it is important to state specific works that have dwelled on the impact of the Covid-19 pandemic on the hospitality sector and other companies. It is worthy to state that the key study commissioned by the National Bank of Belgium (NBB) in its *Economic Review Quarterly Journal* which has provided a wealth of

data to substantiate the arguments held by the above-mentioned works. The situation of Belgian firms is analysed in the NBB Economic Review of September 2021. Dhyne and Duprez (2021) explore a comprehensive review of the evolution of Belgian firms in the pandemic and post-pandemic era. They stress that manufacturing, construction, trade and business services especially food and accommodation had the weakest performance during the first lockdown (15-03-2020). However, firms under accommodation and food services fared worse. They offer illuminating insights on the nature and depth of the crisis by comparing the Global Financial Crisis (GFC) of 2007-2008 and the Covid-19 pandemic of 2020. They assess the rigid first and second lockdowns in Belgium which took place in March and October 2020. Their findings reveal that the economic repercussions during the first lockdown in March 2020 was severe. However, in the second quarter of 2021 most Belgian firms were doing well except for the hospitality industry. This article highlights some of the most salient contrast between the GFC and the Covid 19 pandemic. Moreover, some important statistics on the evolution of the food services and accommodation industry were drawn from Dhyne and Duprez (2021) paper to support the analysis of this thesis.

B. Coppens et al (2021) have provided an in-depth overview of the adverse effects of the pandemic on the Belgian economy. They articulate the reasons why the Belgian government opted for strict lockdowns in March and October 2020: to limit the spread of the pandemic and to relieve pressure from a healthcare system overwhelmed with pandemic patients. The paper examines the ramifications of the pandemic on the Belgian economy by discussing the key features of the economic crisis brought about by the pandemic, the asymmetries and a detailed comparison of the two crises: GFC and the pandemic. Through a mixed method approach, the quantitative aspects of the pandemic are explored through GDP, income and employment and the qualitative changes ushered by the pandemic impacts on greater digitalisation of retail trade, teleworking, real estate and the decimation of the hospitality sector.

The vectors applied in evaluating the consequences of the pandemic on the lodging and food services industry is the termination of temporary contract workers, job losses, income inequality and the continuous rise of poverty among low and middle income households. This contributed to an employment asymmetric shock. Job losses for instance were highest in the hospitality sector accounting for almost 9.2% of the workforce (Coppens et al, 2021). The mitigation efforts by the government is worth mentioning. Coppens et al (2021) discuss the temporary measures put in place by the government in an effort to fight temporary lay-offs

and job losses. The downside of the pandemic which may become the future prospects and distractions linked to the market for factors of production are unravelled: labour shortages and digital skills; an increase in teleworking; well-being and labour participation and the vagaries of the real estate markets. The quantitative and qualitative data were provided by Coppens et al (2021). Another work chronicles the impact of the pandemic and the vulnerabilities of Belgian working families especially those slightly above the poverty line (Horemans et al 2020). In their study, they present striking statistics on the number of people unemployed during the pandemic and how many workers lost their jobs because they worked in the food and accommodation industry which got decimated by the pandemic. They state that the coronavirus pandemic unevenly affected workers. The majority of those who bore the brunt of the pandemic did not have enough liquid assets or other capital components for a month's wage loss without ending up in poverty. Horemans et al (2020) state that during the pandemic the government undertook measures to assuage the plight of the workers. Unfortunately, the replacement income could not match their monthly earnings. Worse still the longer the pandemic, the risk of financial insolvency among these workers. They submit proposals on how to restructure a new system which would alleviate the plight of the hospitality sector workers.

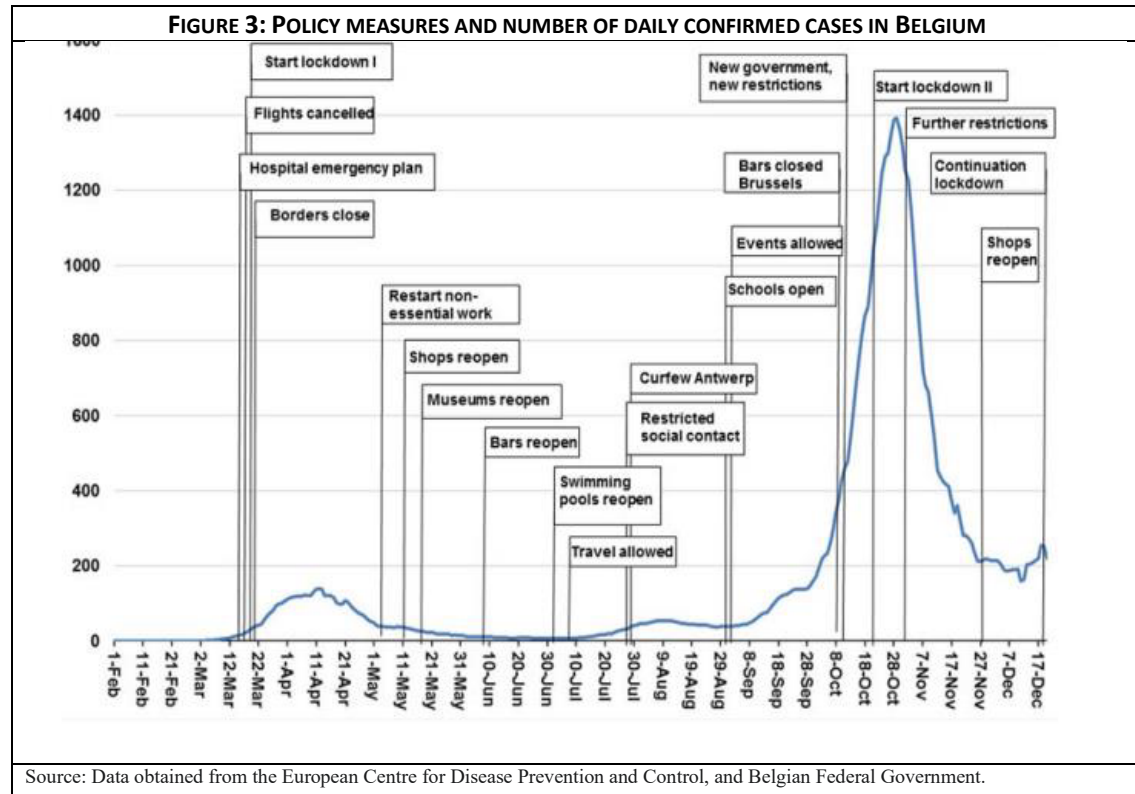
2.5 Measures Undertaken by the Belgian Government to Contain the Spread of the Pandemic

A series of measures were undertaken by the Belgian government to curb the spread of Covid-19 pandemic. These included Non-Pharmaceutical Interventions (NPI) and strict health guidelines to stem the virus. The Federal government also undertook a series of internal and external re-structuring of the system in order to contain the pandemic. It required legislative intervention in an effort to shore up support of the Federal government especially with the invocation of emergency powers and curfews. The Federal Government therefore undertook a series of political, legislative and socio-economic steps to stem the virus.

2.5.1 Lockdowns

The lockdown was a NPI measure widely applied by the Belgian government to contain the virus (Luyten and Schokkaert, 2020). It led to the total closure of certain sectors of the economy especially hospitality and catering, recreational and sporting activities. Food and pharmaceutical sectors remained opened. Curfews were imposed between midnight and 05.00 in the morning. Wearing of masks and social distancing in public spaces were mandatory,

outdoor and indoor activities were restricted to very strict guidelines. Suspension of non-essential travel both locally and internationally was enforced. Belgian borders were officially closed for non-essential travels between 27 March and 15 April 2020 and these measures were further extended.



There was the establishment of the Group of Experts for Exit Strategy (GEES) on 07 April, 2020. The GEES was to advise the government on what sets of practice and rules it should adopt in order to contain the virus. As the Covid-19 pandemic expanded other Federal, Regional and Local committees or groups were formed. The Inter-Federal Crisis Centre for Coronavirus Control (IFCCCC) held daily press conferences to publish statistics and share prevention advice.

2.5.2 Reorganisation of the Hospital and the Healthcare Sector

The pandemic exposed major weaknesses in the Belgian healthcare sector. However, the hospitals took the lead in the reorganisation of the sector in order to cope with the rising number of infections. Hospitals increased the number of beds in the Intensive Care Unit (ICU). Moreover, emergency care unit was also restructured to stand the test of time (Van de Voorde et al, 2020). Special recruitment platforms were launched to accelerate the hiring of

nurses and other specialists. A new crisis management system was launched to guide people with symptoms to consult the General Practitioners (GP) through telephone before coming to the hospitals. Triage centres were set up in various cities and towns to accelerate testing. Due to immense shortage of masks and other medical equipment like the testing kits, the Federal government partnered with several companies to supply the much needed materials.

Financial incentives and other subventions were allocated to the healthcare sector. A Coronavirus Czar was appointed at the latter part of 2020. The Coronaalert app was also introduced. Telework was heavily encouraged as means of reducing transmission in offices and several sectors. Increase sensitization to encourage people to vaccinate and other transmission awareness campaigns were launched to advice people on common hygiene and sanitation routines to stem infections. Those infected were to isolate for a couple of days.

2.5.3 The Introduction of Covid Safe Ticket (CST)

The CST was launched in 1st July 2020 to facilitate traveling within the European Union member states. The certificate was issued to those who are recovering from Covid-19 infection or those who had a negative coronavirus test within 48-72 hours or those who have been vaccinated. There are three types of CST issued in Belgium. Firstly, those who have been vaccinated a CST that last for one year from the date of vaccination. The second CST concerns those who have conducted a test between 72-48 hours. There are two kinds of tests: Polymerase Chain Reaction (PCR) and the Rapid Antigen Test. Many EU countries like Belgium insisted on the PCR test. The third form of CST was issued to persons who were recovering from Covid-19 infection. In order to qualify, the person should have been recovering from the virus infection at least 11 days after the person tested positive.⁴ The CST is also contained specific information about the vaccine that has been administered and whether it was the first or second shot. The CST is issued in four languages French, Dutch, German and English. Moreover, it contains a QR code which when scanned would determine its authenticity. The Belgian government also facilitated the process of obtaining the CST through various online apps like CovidSafeBE or via websites of the Ministry of Health. The introduction of the CST was an important milestone in stemming the spread of the Covid-19 pandemic.

⁴ <https://coronavirus.brussels/en/request-your-covid-certificate-to-travel-covid-safe/>

2.5.4 Financial Measures Introduced by the Federal and Regional Governments

A series of measures were undertaken by the Belgian government to support the economy which was faltering due to the strict measures undertaken by the Federal Government to contain the virus. Many sectors of the economy especially food, accommodation and recreational businesses were shut down. The federal government introduced payment plan deferrals and exemptions especially in the social security contributions, Value Added Tax (VAT), withholding tax income earnings and personal and corporate tax. Companies that applied for these subventions were mandated to proof that the payment difficulties were linked to the Covid-19 pandemic. The HORECA sector also benefitted from other forms of financial interventions since it was one of the hardest hit sectors. The regional governments of Brussels, Wallonia and Flanders also undertook certain support measures to shore up businesses.⁵

The Wallonia Regional Government postponed the withholding of immovable tax assessment to August/September 2020. Inheritance tax and registration duties were suspended; tax on automatic entertainment devices which affected mainly the HORECA sector was reduced to 1/12 per month. Moreover, very small businesses suffering from the drastic measures like lockdown could ask for free compensation of €5000.⁶

The Brussels Regional Government postponed the payment of road tax and immovable withholding tax. The Brussels government also suspended the deadlines for the compliance with tax obligations (filing, payment, and conditions of favourable regimes). Next, support premiums, loans, and so on for the affected sectors (HORECA, events and cultural sectors). Moreover, the government introduced tax incentives for loans by individuals to Small and Medium Size Entrepreneurs (SMEs) also called proxi-loan. Government guarantees on bank loans were extended and there was the acceleration treatment of grants of expansion for support of certain sectors (tourism, HORECA, culture and events). The Brussels Government also abolished the regional city tax in 2020.⁷

The Flemish Regional Government introduced the ‘New Flemish Protection Mechanism.’ It stated among other things that businesses which incur a turnover loss of up to 60% can apply

⁵ https://assets.ey.com/content/dam/ey-sites/ey-com/en_be/topics/covid-19/ey-government-support-package-june-2021.pdf

⁶ Ibid

⁷ https://assets.ey.com/content/dam/ey-sites/ey-com/en_be/topics/covid-19/ey-government-support-package-june-2021.pdf

for a tax-free premium as a compensation. Moreover, the conditions and loans linked tax incentive were loosened and made more attractive and a similar regime was introduced for share participation. Next, businessmen who invested into the Flemish Welfare Funds would benefit from tax reduction. The Fund's shares were subjected to the reduction of the inheritance tax. There was extension of the deadline for inheritance tax obligations until January 31, 2021. Payments for immovable withholding tax could be deferred for up to four months including road tax for businesses.⁸ From the foregoing we can state that both the Federal and regional governments adopted robust policies to stem the spread of the virus as well as financial and tax incentives to kickstart the businesses that were hard hit by the lockdowns and other restrictions.

2.6 Conclusion

This chapter has examined the conceptual and critical review of the literature including the various measures implemented by the Federal and regional governments to stem the virus and boost business sectors heavily affected by the virus. Crisis management has been the main concept reviewed. The pandemic is perceived as a major crisis which rattled the economy worldwide. In the foregoing, crisis management was overviewed from various periods. The review of the literature *per se* concentrated on phases: the global one which mainly reviewed the impact of the pandemic on the hospitality sector in other regions and countries in the world. These papers present a wealth of examples of the various phases of the crisis in the lodging and food services, the specific interventions by the governments and their effects on the workers. These issues open up various avenues to compare the impact of the crisis with that on Belgium. Moreover, household earnings, inequality, mental health issues, job losses, temporary lay-offs and poverty have all become the hallmarks of the lingering effects of the pandemic.

On the other hand, the second strand of the literature review concentrated on specialised studies on the impact of the pandemic in Belgium on accommodation and food services. The literature re-contextualises the current debates about the short-term and long-term effects of the pandemic on the economy. It discusses the measures implemented by the Federal and Regional governments in their bid to stall the spread of the pandemic. One of the arguments highlighted in the findings of this work is the vulnerable conditions of workers who are active in the hospitality sector. From the evidence gathered in the abovementioned literature, the

⁸ https://assets.ey.com/content/dam/ey-sites/ey-com/en_be/topics/covid-19/ey-government-support-package-june-2021.pdf

industry is dominated by people of low and middle-income households who have very meagre savings as a result of their monthly income. The role of government is exemplified in the works as well. However, other questions still emerge: will the government continue to support vulnerable workers as the crisis persists? If another variant re-emerges would the government resort to another strict lockdown which would certainly affect most of the workers in the hospitality industry? What has been the perception of the current workers in the sector? The study would answer these questions in the fourth chapter. The approaches and techniques used in collecting and collating data are exemplified in the next chapter on the methodology of the research.

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Introduction

This study essentially drew from primary and secondary data sources. To arrive at the overall findings in the study, several techniques and research methods to collect, collate and analyse data were employed. The principal research design was qualitative approach in data analysis within the same study. In assessing the current impact of the Covid-19 pandemic on the hospitality sector, a number of factors were considered important and valuable to have a better understanding of the contextual environment of the coronavirus on the HORECA:

- The advent of the coronavirus led to a series of wide-ranging direct and indirect state intervention measures (repressive, fiscal, treasury, et cetera) in the HORECA and allied sectors. However, these measures (such as the lockdowns and the fiscal exonerations) were drafted within a disaster context with limited time and long-term analysis and planning.
- In essence, the constant mutations of the coronavirus have ushered in various approaches to stem the spread of the virus. In most cases, the hospitality sector has borne the brunt of the adverse effects of these policies like the total closure of businesses or the drastic reduction of the number of clients.
- Moreover, the policies initiated by the Federal Government to stem the spread of the health crisis also necessitated other measures to address rising unemployment, especially in the HORECA (Hotels, Restaurants, Catering) sector and the gradual decline of investments in the industry.
- By and large, there hasn't been a quick fix to the problem. Both the sector concerned and the Federal Government have been struggling to adapt to the ever-changing health crisis landscape. These factors played a crucial role in the selection of the methods and techniques we adopted in the research. The work, therefore, utilised both secondary and primary data.

3.2 Secondary Sources (Data)

Secondary sources of data mainly concerned the reviewing of literature on the Covid-19 pandemic as a whole. However, the majority of the secondary sources utilised centred on Belgium as the epicentre of the study. The main examples of secondary materials consulted were textbooks, articles in periodicals and journals, newspapers, magazines, monthly, quarterly and annual reports and online news among others. The table below summarises the secondary data used in this study.

FIGURE 4: SOURCES OF SECONDARY DATA

Method	Assessment of Literature
Sources	Libraries: The KuLeuven Central Library and the Université Catholique de Louvain. Online databases and websites were also accessed.
Type of Literature	Newspapers, magazines, articles in journals, online news media and so on
Language Text	English, French and to a lesser extent Dutch
Authors	Combing sources online through desktop reviews and authors specialising in the effects of the pandemic on the hospitality sector.
Publication Year	Up to 2022

3.3 Primary Sources

The study mainly adopted the administration of questionnaires to HORECA employees, managers and business owners. However, the following sections would elaborate on the specific approaches and techniques used in analysing both secondary and primary data, how and why the questionnaires were designed and the specific methods in data collection and analysis.

3.4 Systematic Research

The study adopted a series of considerations in the assessment of both primary and secondary data. The table below focuses on some of the criteria adopted by the study. There are many approaches to systematic research. However, we have selected six outstanding aspects of systematic research propounded by C.R. Kothari, *Research Methodology: Methods and Techniques 2nd Edition* (New Delhi: New Age International Publishers, 2004: 8).

FIGURE 5: KEY ASPECTS OF SYSTEMATIC RESEARCH

Ethical Neutrality	It aims at making adequate and correct statements about certain facts and issues related to research and avoiding biases.
Probable Predictions	From its arguments based on evidence it can make predictions.
Thorough Methodology and the formulation of Scientific Theories	Its methodology is made known in order to elicit scrutiny and criticism of some theoretical postulations held by the study.
Reliance on Empirical Evidence	Every research must rely on empirical evidence against unfounded claims or guess
Relevant Concepts	Relevant concepts must be articulated by the research with clarity.
Objective Consideration	The study must be committed to the objective as opposed to subjective considerations.

Having illuminated aspects of systematic research considered during the study it is paramount to examine how and why the questionnaires were designed.

3.5 Designing Questionnaires

Several aspects related to the designing of the questionnaires were taken into consideration. Designing questionnaires are of crucial importance when dealing with topics related to surveys of behaviours, attitudes, first-hand experiences and values (Newell, 1993). They can be administered through emails, face-to-face or telephone and/or post. Questionnaires are classified into two types: close-ended and open-ended questions.

3.5.1 Closed-Ended Questions

It relates to questions that ask respondents to choose from a distinct set of pre-defined responses like 'True or False' or multiple choice questions. The closed-ended questions can be grouped into two categories: dichotomous and multiple choice questions. The former elicits direct responses like 'Yes or No' whereas the latter deals with questions which are easy and flexible. It really helps the researcher to gather and analyse the data.

3.5.2 Open-Ended Questions

They cannot be answered by a simple ‘Yes or No.’ The open-ended questions require respondents to either explain, suggest or comment on issues which cannot be covered by the closed-ended questions. Moreover, the researcher may seek to know their reactions to specific policies by commenting or stating feedback or their experiences. This questionnaire type is very useful for those undertaking qualitative studies. Additionally, it is instructive to assess the two forms of administering questionnaires and why and how the study has been reliant on both to an extent.

3.5.3 Why and How the Thesis Adopted both Approaches

Both open-ended and closed-ended questions can be evaluated from three main perspectives: kind of data, depth of the data and the circumstances pertaining to whatever study we engage in. As for this thesis, we have utilised both forms of questions for specific reasons. Firstly, we needed to generate quantitative data which would help us in assessing the nature of the implications of the pandemic on the Hospitality Sector. Therefore, it leaves very little debate about the statistical data the work seeks to project. This is quite opposite of the open-ended questionnaires that gauge and analyse specific issues related to people’s emotions, suggestions and experiences which can be subjective in nature. Nonetheless, the two forms are complementary. For instance, when the survey does not cover every possible aspect of the research the open-ended questions help to fill in the gaps. In this particular study, we adopted both styles albeit the close-ended type got the majority of the questions because they are quick to respond to, easy to quantify and much easy to analyse especially when the number of respondents is huge.

3.6 How the Questionnaires were Designed

We created two sections in the questionnaires. The first section handled the introduction of the candidate undertaking the research, why the study is carried out, ethical issues related to confidentiality and privacy and a thank you. The second section dwelled on the questions. There were fourteen questions in total, tailored along the lines of the research objectives, aims and questions of the thesis. Ten of the fourteen questions featured mainly closed-ended questions whereas the rest dwelled on opened-ended questions.

3.6.1 Selection of the Respondents

The selection of respondents considered key variables in handling aspects related to the study. We sought to identify agents and businesses active in the hospitality sector in Belgium. We also sought some statistics on the contribution of the HORECA sector to the GDP of Belgium before and during the pandemic. Moreover, we wanted to assess the nature, degree and ramifications of the assistance injected by the Federal Government in an effort to prop up the sector. Below is a list of the respondents due to data privacy only their first names shall be mentioned:

List of respondents

- 1) Divine
- 2) Kingsley
- 3) Geert
- 4) Tobias
- 5) Ike
- 6) Felicia
- 7) Chioma
- 8) Adaeze
- 9) Richard
- 10) Samuel
- 11) Mathias
- 12) Susan
- 13) Samuel
- 14) Jude
- 15) Ngole

Having considered the abovementioned factors and the names of the respondents we delved into the sampling model.

3.6.2 Sampling Model

In order to establish an in-depth analysis of the crisis within the HORECA sector, we decided to streamline our sample size along the following prevailing factors:-

- Thirty respondents made up the sample size. However, only 15 respondents completed the questionnaires

- Questionnaires were administered to key figures of the industry (owners of the businesses, upper cadre involved in policy-making and decisions within a given business and general staff).
- We did not design specific questionnaires for Government agencies directly responsible for addressing the crisis within the sector. We decided to rely on reports, newspaper articles, documents and websites on Government platforms enunciating specific policies articulated and implemented.
- By and large, to minimize bias and any shortcomings we carefully adopted various aspects of quality criteria: relevance and evaluation, erudition, testing of alternative explanations and thoroughness among others.

3.7 Method of Data Analysis

Various techniques were utilised by the study in order to analyse data. Since the entire work is a combination of primary and secondary data we adopted a multi-prong approach to analysing the consequences of the pandemic on the hospitality sector in Belgium. Three major types of analysis were adopted in the assessment of the data. This included: content, qualitative and case study analyses.

3.7.1 Content Analysis

Analysing contents of textbooks and relevant documents related to the subject matter (Shannon et al 2005) of the thesis was carried out. Content analysis according to Klaus Krippendorff ‘is a research technique for making replicable and valid inferences from texts (or other meaningful matter) to the context of their use’ (Krippendorff 2004, 18). Content analysis is an efficient alternative to public opinion research - a technique for tracking markets, political ideologies, and a way of exploring human thoughts (Krippendorff, 2004). Analysing the contents of various textbooks and articles on the economic fallouts of the pandemics helped the researcher in developing new insights, and an understanding of certain phenomena. Through this technique, the researcher was able to review critical literature and scrutinize other documents relevant to the research.

3.7.2 Qualitative Analysis

This approach to data analysis facilitated the assessment of the pandemic’s impact on the hospitality sector. Both deductive and inductive logic for analysing data were utilised. Where the contents of specific books and articles were insufficient, the findings of the questionnaires were incorporated.

3.7.3 Case Study Selection for Analysis

The case study of the research is Belgium. We chose Belgium due to the following reasons:

- The researcher is schooling in Belgium and can easily have access to primary and secondary materials.
- Belgium, just like other western countries has suffered severely from the pandemic despite imposing stringent lockdowns and public policy guidelines.

3.8 Conclusion

This chapter has explored various techniques and approaches we undertook in the collection and collation of data. The study relied heavily on qualitative method approach in analysing data. The sampling model included fifteen respondents and data was analysed through content and qualitative approaches. Due to the considerable literature on the subject of the pandemic, we preferred to carry on a case study selection. In examining the consequences of the pandemic in Belgium, our main focus was its impact on the hospitality industry. We concentrated our analysis on two levels. What are the various textbooks, articles, papers and documents stating the effects of Covid-19 on the accommodation and food services sector in Belgium? We carefully distinguished general sources about the said subject in different regions of the world by using content analysis. On the other hand, we delved deeper into the sources by concentrating on specialised studies in Belgium. Facts were collected through desktop reviews and libraries. These facts were complemented with the data from our questionnaires. Through a multidimensional approach, we complemented and supplemented our findings by using both the secondary findings and the conclusions from the results derived from the questionnaires. This constitutes the major thrust of the next chapter.

CHAPTER FOUR

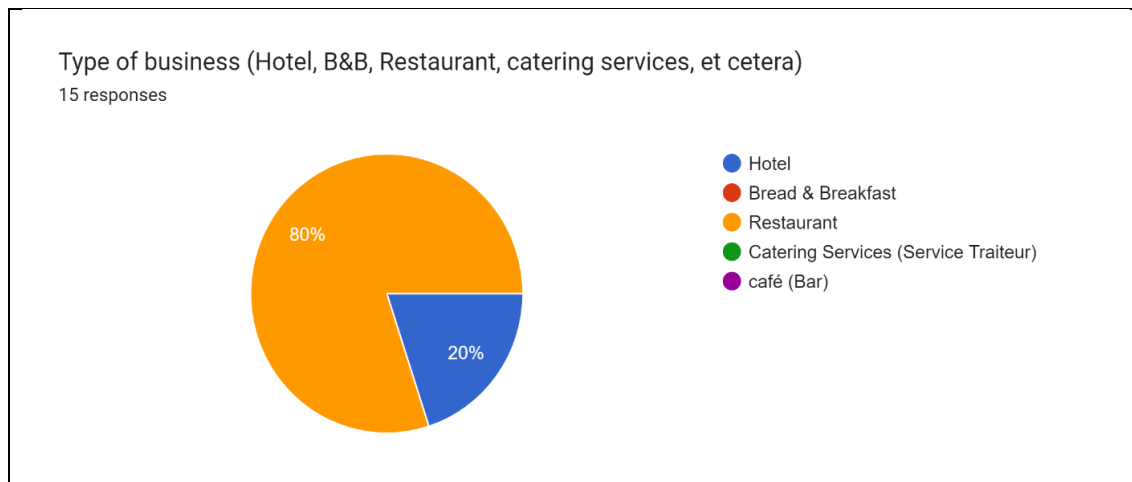
FINDINGS AND DISCUSSIONS

4.1 Introduction

In this chapter of the study, we examine the major conclusions from the secondary and primary sources. We administered 70 questionnaires. However, just fifteen respondents were able to complete the questionnaires. We would like to mention a few procedures linked to these questionnaires especially the designing by posting the outcome of specific segments. The questions were designed using google forms and part of the analytics are generated by the google software.

4.2 Sample Size and its Constituents

In our sampling model we disseminated 70 questionnaires in the sectors mentioned above. We administered 20 questionnaires to hotel and Airbnb managers. The other 50 were randomly sent to restaurants, catering and cafés among others. This included owners of the businesses, managers and general staff. The forms were sent entirely by email. The responses we got from the 15 questionnaires were overwhelmingly skewed towards restaurants. In fact 09 persons represented restaurants whereas 06 respondent work in the hotel sub-sector. Therefore, we see a disproportionate representation of the restauration sector as opposed to others.

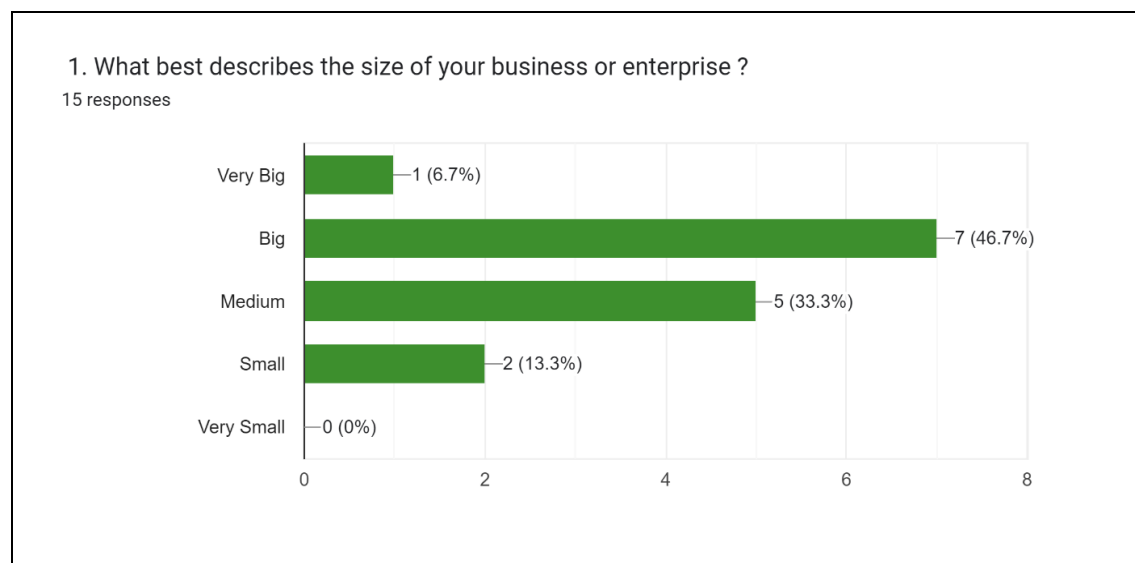


Next, we also realised that some of our respondents were of student background, 5 in total out of 15. Besides, the sociological components of the respondents were also revealed by our

findings. 12 out of the 15 respondents were people of non-EU extraction. Nonetheless, in designing and disseminating the questionnaires, there was a fair balance for instance among the original thirty questionnaires we sent to businesses owned and managed by native Belgians and, we also included those owned and directed by non-EU residents.

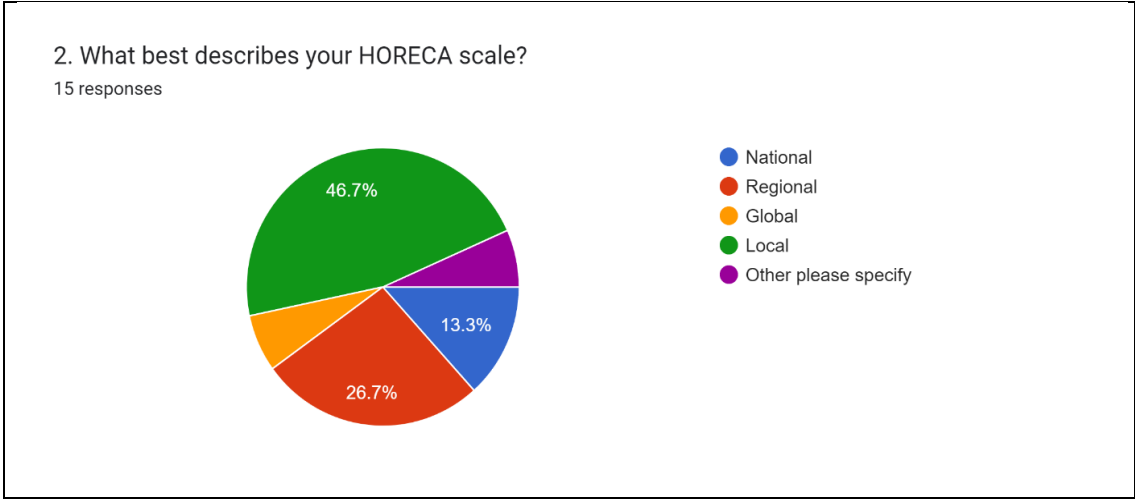
From the foregoing, as earlier stated, the highest number of respondents were of non-EU heritage. This likely affected the outcomes of the data since Coppens et al, 2021 and Horemans et al, 2020 have presented the downturn of the pandemic effects on the hospitality sector and have argued that the workers of this sector and most especially the non-EU residents were heavily impacted by the pandemic in terms of job losses, temporary lay-offs and falling below the poverty line.

The study also investigated the sizes of the businesses in the accommodation and food services sector. It also wanted to know their scope: national, regional, global and local. The intent was to investigate if the size and the scope of operation of the business matter as to what impact the business suffered from the COVID-19 pandemic. Overall, 50% of respondents described their business as big (that is business units with at least 20 employees).

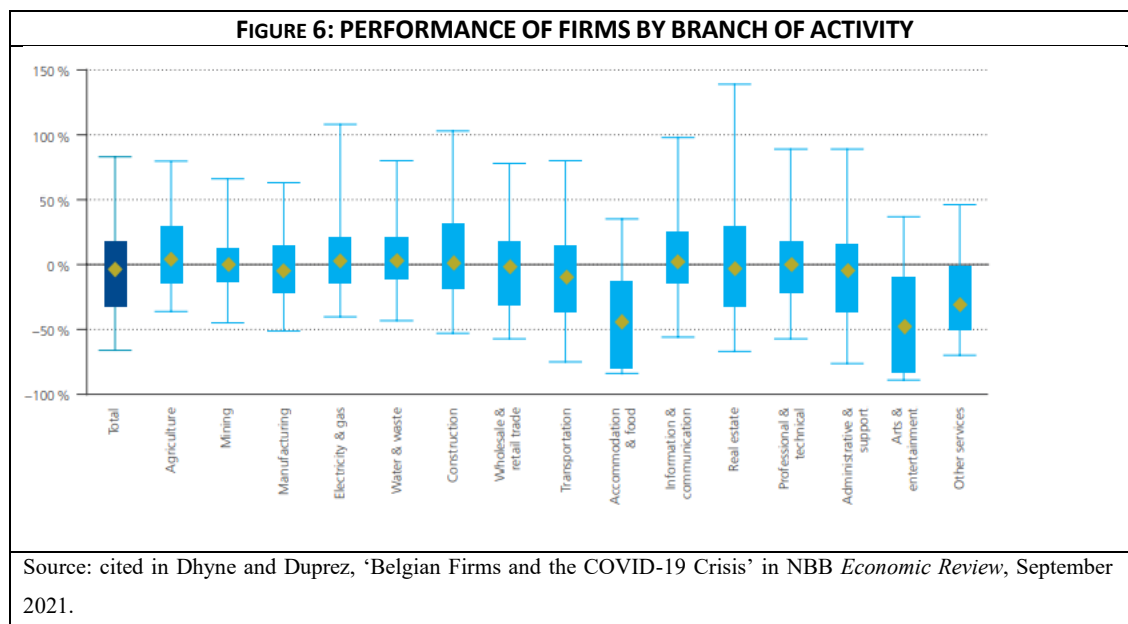


So too most 07 of the 15 respondents described their scope of operations as local. This could mean these businesses were typically well entrenched in specific geographical areas and did not have branches and/or other units beyond their traditional geographical area of operation. Nonetheless, a quarter of respondents defined the operational scope of the business with which they worked as regional. Given the unique geo-administrative structure of Belgium, this is not

unusual for businesses could be regional and local at the same time. It could also relate to identity identifiers that reflect the region where the business is located as it is more a matter of being in one of the broader regional administrative units of the country - that is Vlaamse, Walloon and Brussels capital. In reality, the impact of the pandemic, the local measures and responses were relatively different across the country despite the insistence to adopt a unified federal approach given the severity of the crisis and the advantage of pooling resources and expertise.



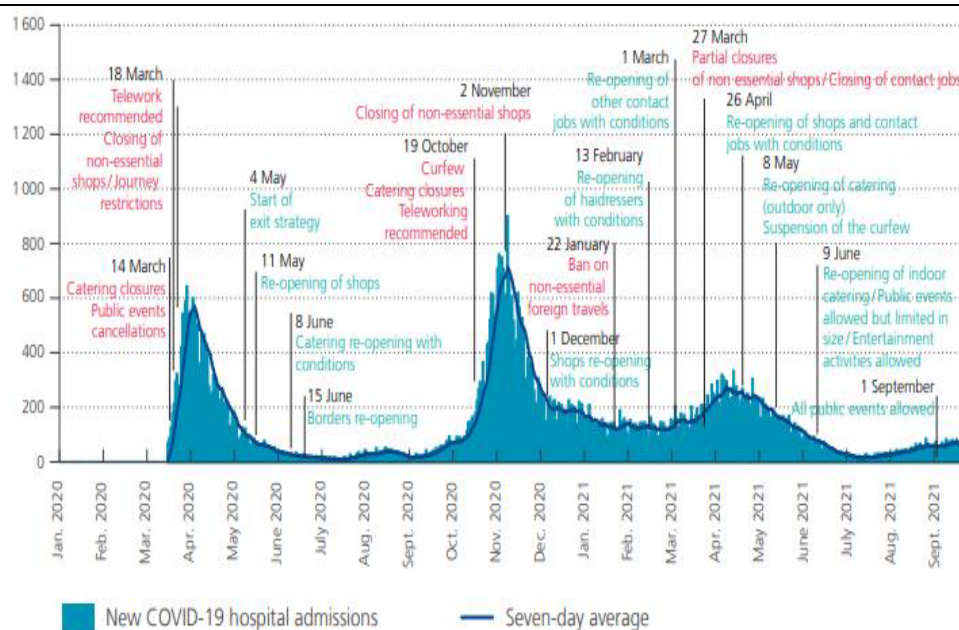
The results attest to the sizes and scope of coverage of the sub-sectors the workers were active in. We were also interested to know the performance of the hospitality sector vis à vis other sectors of the economy. This data was extracted from the NNB *Economic Review* paper.



From the chart above the industries that fared worst were Accommodation and Food, Arts and Entertainment (AFAE). Furthermore, as Dhyne and Duprez (2021) argued, these industries fared worse because during the first and second lockdowns they were required to close their businesses or operate at limited capacity. They contend that on the average each day of restricted activity reduced the turnover rate by 0.26%. The businesses in this sector had no other alternative than to resort to furloughs and other forms of lay-offs.

In the second chart below we can see clearly the entire pandemic period between 15 March 2021 right up to September 2021. The chart describes the major NPI adopted by the government especially when there was a steep rise in infections and deaths. On the chart therefore one can clearly see the evolution of the infections; whenever there was a steep rise of infections, more stringent NPI would be applied. Besides, if we read through charts 1 and 2, the main consensus is that the performance of certain businesses or sectors was tangential to the easing of lockdown rules and we can see how adverse the hospitality sector fared.

FIGURE 7: MULTIPLE LOCKDOWN MEASURES TO CONTAIN THE PANDEMIC

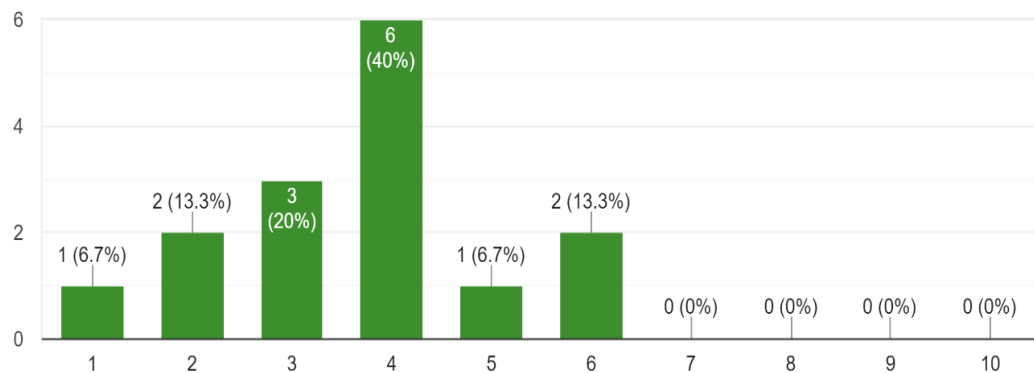


Source: Coppens et al. (2021) 'The Belgian Economy in the Wake of the Covid-19 Shock' in NBB, *Economic Review*, 131.

To underscore the consequences of the lockdowns on businesses in the hospitality sector we asked our participants to rank on a score of 1-10 how active their businesses were during the pandemic - 10 being the most active and 1 being the least (akin to near shutdown). The majority of respondents, 11 chose 4 and below. This ranking underscores the dominant position of several authors on the economic impact of the pandemic in the hospitality sector (Kim et al 2021; Coppens et al, 2021; Dhyne and Duprez 2021; Chen et al, 2022) and reiterates the claim that the severe lockdowns imposed on the hospitality sector led to the decimation of industry.

8. On a score between 1-10 how active was the business during the pandemic?

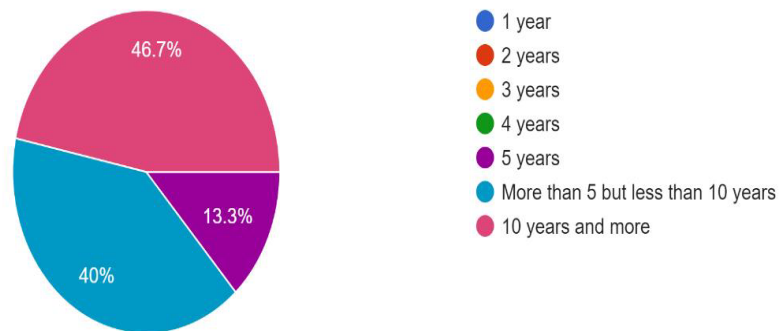
15 responses



We also delved into the longevity of the businesses or firms the respondents worked for, managed or owned. The results are classified in the following order below:

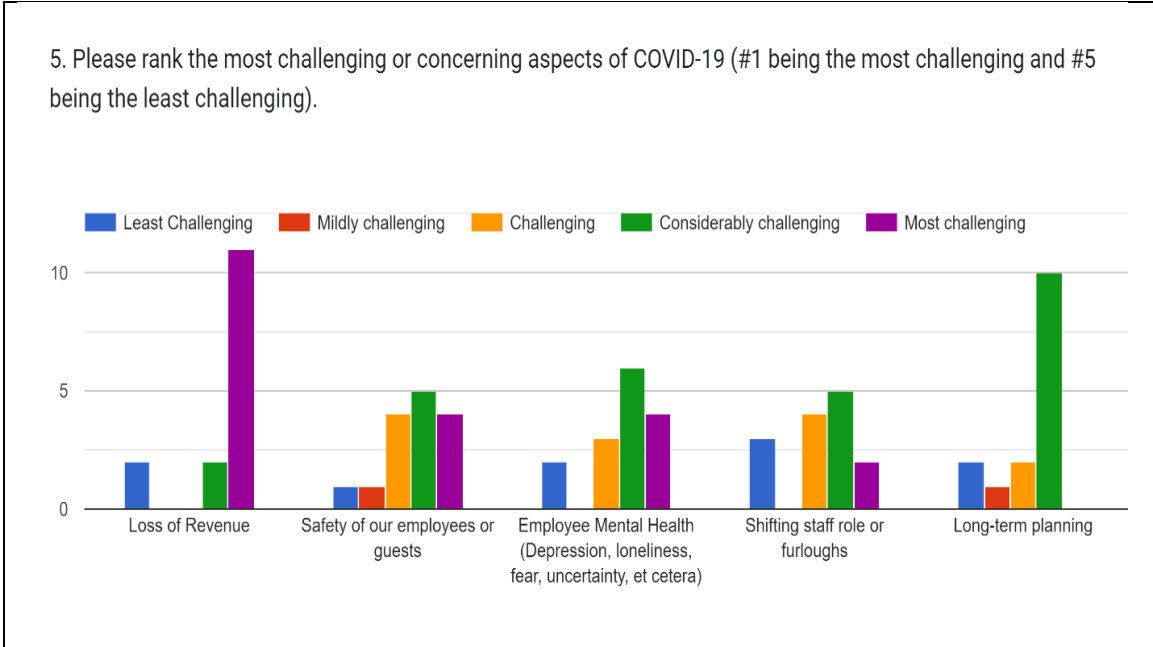
4. How long has your business unit or enterprise been in operation (before the pandemic)?

15 responses



The majority of the businesses have been in operation for more than five years. This particular question was important because we needed to know how these firms were weathering the storm. It is obvious that longevity did play an important role in terms of the resilience of the hospitality sector. It was plausible that the majority of our respondents worked in businesses that were more than five years old.

Next, we went to the most concerning or challenging aspects of the pandemic and our participants were introduced to five major problems brought about by the pandemic in the hospitality sector. We ask respondents to rank them from the least to the most challenging problems: loss of revenue, shifting staff roles or furloughs, employee mental health, the safety of the employee or guests and long-term planning. We noticed that 11 classified loss of revenue as the most challenging problem unleashed by the pandemic whereas 2 stated that it was considerably challenging.



The next set of problems that garnered traction after the loss of revenue was long-term planning which was ranked as considerably challenging. The number of participants who ranked long-term planning was 10 in total. We were surprised by this outcome, however, it seems some of the respondents answered from a managerial perspective. It could also be possible that given most respondents were employees, their primary concern was job security amid a pandemic that ravaged family incomes and dented their chances of moving into other sectors of employment which required limited retraining and job flexibility.

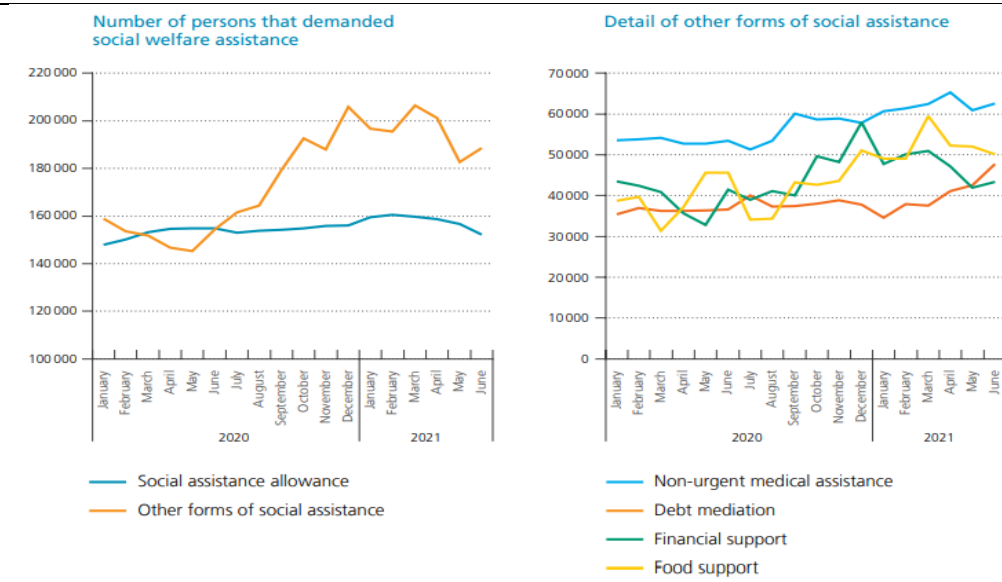
Employee mental health (depression, loneliness, fear and uncertainty) and the safety of our employees or guests were ranked considerably challenging by 5 participants. Shifting staff roles and furloughs were ranked challenging by 4 respondents. By and large, we opine that within the hospitality sector itself a major stressor was the fear of becoming infected and furloughed. This in itself contributed to a mental health crisis for many of the workers in the

sector. The situation was compounded by the nature of the jobs in the hospitality sector: remote work is not possible in most of the industry. Hence, workers needed to come despite the risk of getting infected or risk of being laid off.

The consequences of the pandemic, especially loss of revenue or income, affected some households adversely. There was an uptick of people seeking financial help or support from the government during the lockdowns and after. Moreover, the application for debt mediation, financial and food support, and non-urgent medical assistance were at exponential rates. As the chart below demonstrates the social welfare assistance centres were overwhelmed with applicants. It must be borne in mind that a considerable number of people seeking help came from the accommodation and food services sector and arts, entertainment and recreation. As already stated above, the majority of the respondents to the questionnaire we administered stated that their operations were reduced to less than their usual capacity and this led to temporary lay-offs and loss of income. Barrez and Van Damme (2020) buttress this fact by contending that despite the granting of unemployment relief as a temporary fix to furloughs some of the money allocated as social benefits to the recipients is even lower than the amount considered within the poverty threshold this is especially true for people who have been unemployed for longer periods.

The rise of poverty and financial insecurity has been explored by Horemans et al (2020). In their study, they argue that the heterogeneous aftermath of the pandemic unleashed both negative and positive outcomes. While some companies came out completely unscathed, others witnessed a debilitating impact. The accommodation and food services were one of such. They also aver that the majority of workers in these sectors lack financial buffers. Up to 60% of the workers in this industry do not have enough liquid assets to bridge a month's wage loss without ending up in poverty. In the hotel and catering subsectors of the hospitality industry, 40% of the employees have almost no net assets. The chart below clearly depicts the pressure on the social welfare services as a result of the NPI put in place by the government and its impact on the industry in question. The compensation measures put in place by the government were also rarely equal to the usual salary of workers and even sometimes lower.

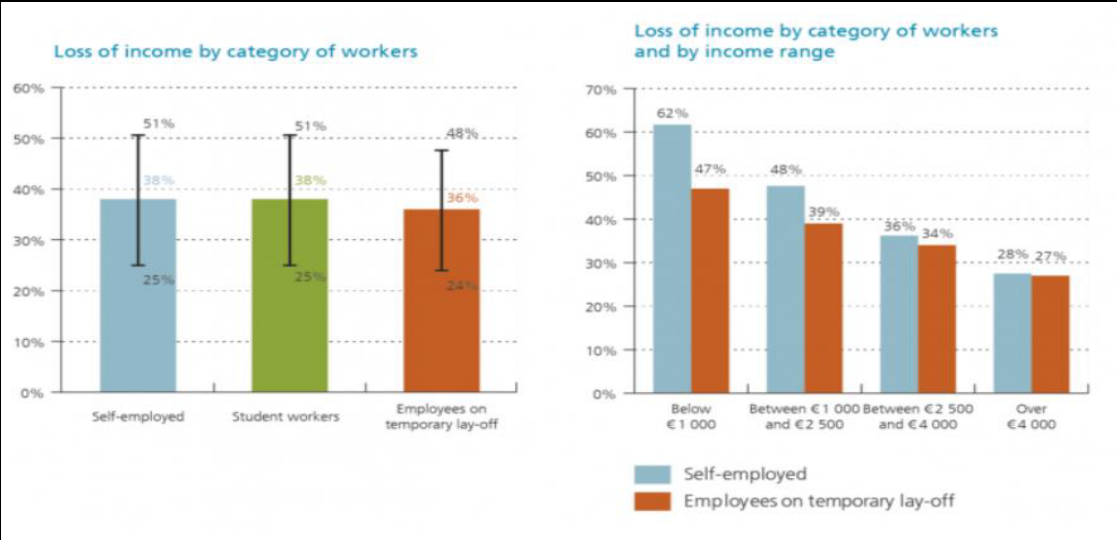
FIGURE 8: RISING DEMAND FOR FINANCIAL SUPPORT PROVIDED BY SOCIAL ASSISTANCE CENTRES



Source: Coppens et al (2021), “The Belgian Economy in the Wake of the Covid-19 Shock.” National Bank of Belgium, Economic Review, 144.

On well-being and labour participation there have been some studies carried out by Sciensano. The institute conducted a survey between 2 and 9 April mainly to find out the impact the pandemic had on the mental health of workers. It revealed that 23% of the respondents suffered from anxiety and 20% from depression. This situation is worse for those who work in the hospitality sector. The chart below shows the extent of loss of income from low-income households and/or workers.

FIGURE 9: AVERAGE LOSSES BY CATEGORY OF WORKERS AND BY INCOME RANGE (%)

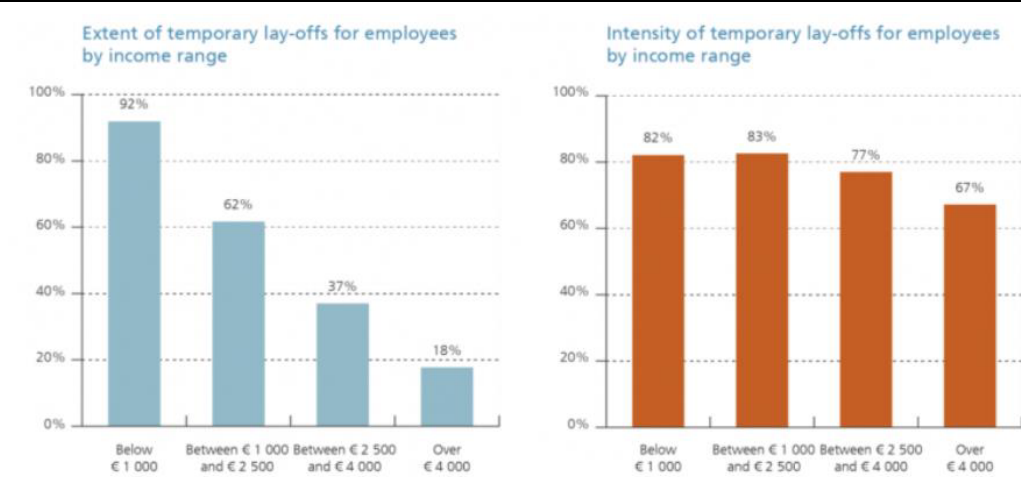


Source: National Bank of Belgium, 2021.

The aforementioned chart gives us a glimpse of the situation of self-employed, temporary lay-off and student workers. The losses incurred are mind-boggling. Moreover, the next chart below describes the income loss of a single class of workers: employees on temporary lay-offs. We can deduce from the chart below that the employees on temporary lay-offs especially those with the lowest income range fared worst. Their situation was much more complex because they had little or no savings and this pushed them below the poverty line.⁹

⁹<https://www.nbb.be/en/articles/coronavirus-crisis-having-heavy-impact-some-households-income-bringing-even-bigger-losses>

FIGURE 10: TEMPORARY LAY-OFFS BY INCOME RANGE



Source: National Bank of Belgium (NBB), 2021.

Our survey also sought to know what forms of support the respondents received from the government or social welfare services. The majority of students in the survey stated none. However, they mentioned other forms of support like free masks, vaccines and sanitisers. Others stated financial support but decried the insufficiency. Over half of the participants are married and they stated that it was difficult to cope with furloughs or the increasing pressure to undertake many tasks at their job sites due to temporary lay-offs.

We also delved into the resilience of the sector. By resilience, we intended to find out the ability of the system to anticipate, withstand or adapt to shocks or challenges. For instance, we sought to know how the hospitality sector quickly adapted to the unpredictable nature of the pandemic. We questioned the participants about the use of new technologies during the pandemics. There were varying responses:

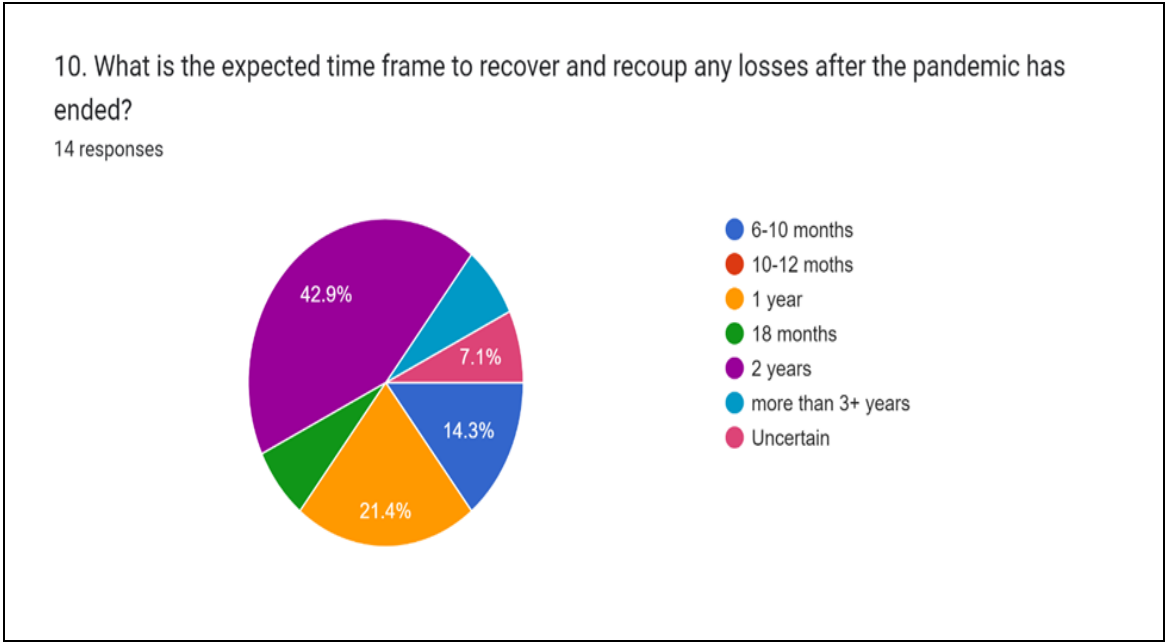
- Online Order
- Online reservation and ordering services
- Online & phone reservation and ordering services
- There was minimum service during the pandemic. So no additional technology was required.
- Website (social media) and telephone
- Online work schedules
- Not applicable

These were some of the responses we got from the participants. However, the restauration sector was very quick to adapt to the new dispensation, unlike hotels. Many restaurants gradually shifted to online apps and home delivery systems, which eased the pandemic’s grip. Unfortunately, this led to some lay-offs.

From the above chart, 4 of the participants (33.3%) said it would take up to 2 years for recovery. Slightly less of the above number of respondents 3 (25%) stated it would take 1-year for the sector to recover and recoup from the losses. The answers ranged from 1 year to 18 months. However, recent research shows that the sector has already recovered and made profits (Coppens et al, 2021).

Nevertheless, despite the complexities and challenges unleashed by the pandemic we actually wanted to know from the staff of this sector a time frame whereby the businesses under the hospitality industry would recover from the crisis and experience revenue increase and expansion same as the pre-Covid-19 era. Here are a few highlights from our findings:

4.3 How long will the Hospitality Sector Recover?



4.4 New Technologies and Telework

One of the brightest consequences of the pandemic has been the upsurge in new technologies and the increase in telework. The Covid-19 pandemic has accelerated the use and adoption of new digital technologies by many firms. In fact, the recent trend shows that many firms invested in software, databases and ICT equipment whereas investments in office buildings, furniture and transport equipment have been on the decline. Unfortunately, many firms are facing lots of challenges to get skilled IT workers.

4.5 Poverty and Inequality

Low-income workers and households continue to fall below the poverty line. Worst still the pandemic has exacerbated inequality. This is rife among the non-EU residents and students who do not have good wages and have little or no savings to bridge a month without salaries.

4.6 Conclusion

From the foregoing we have discussed the method of data collection and collation. We have also shown in our analysis the various ways the pandemic impacted the hospitality sector through the questionnaires we administered. One of the major outcomes of the findings contended that the pandemic had a heterogeneous shock on the Belgian economy: some sectors quickly adapted their systems and excelled during the national lockdowns. Unfortunately, other sectors are still recovering from the vestiges of Covid-19 like accommodation and food services. The workers in this sector have faced turbulent times battling with temporary lay-offs, job losses, income loss, depression and poverty.

CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

This study set out in answering four specific questions. The main aim of the thesis was to examine the impact of the pandemic on the hospitality sector. Belgium was the main focus of the study. Through the prism of the crisis management concept, we were able to identify the major challenges that confront institutions and countries during times of crisis. We discussed these concepts vis à vis the GFC between 2008-2009. By re-examining the concepts of crisis and crisis management we were able to assess the Covid-19 pandemic in three phases: pre-crisis, crisis and post-crisis phases. We based our research on the pandemic's impact on the accommodation and food services industry in Belgium.

In this light, the literature review of the study was done in three tiers. The first tier discussed the general effects of the pandemic in the world. By shedding light on this, we were able to establish the pandemic's consequences in the entire global economy albeit focusing on the hospitality sector. We examined the various approaches adopted by the Federal Government of Belgium and the three regional governments viz: Walloon, Brussels and Germanic regions. We analyse the short and long term measures adopted by the Belgian state to stem the pandemic. Our research reveals that the Federal and regional governments adopted NPI and other socio-economic measures to address the coronavirus pandemic. We address some of these approaches like strict lockdowns and curfews, re-structuring of hospitals to accommodate more people in the Intensive Care Units (ICU), the postponement of social security contributions for the self-employed, allocation of unemployment benefits for workers affected by the pandemic, and the creation of various commissions and institutions to articulate solutions aimed at tackling the crisis. We interrogate these processes and analyse their broader effects on the hospitality sector. In order to answer these questions we drew our attention to the methodology of the study. We utilise both primary and secondary data as sources of the study. We adopted the qualitative approach to analyse the data. The primary data constituted both questionnaires and interviews. Fifteen people responded to the questionnaire. This was actually a low response rate. We do admit that had it been our sample size was larger, there may have been a slightly different outcome. Nonetheless, we complemented our findings with secondary sources. Therefore, the numerous texts, chapters in books, articles and report provided substantive evidence to corroborate our arguments in the study.

We contend that the pandemic's effects resonated in most of the sectors that warranted direct contact with clients. Hence, the hospitality sector could not survive the shockwaves unleashed by Covid-19. The impact on the sector were multifarious: temporary lay-offs, depression, job losses and impoverishment. The gap between the poor and the rich got exacerbated during and after the pandemic. Despite the unsalutary effects of the pandemic, there were however some plausible consequences such as increase in teleworking, increase digitalisation of the business space, and the continuous improvement of the accommodation and food services sector. Nevertheless, increase digitalisation has also compounded the growth of other sectors of the economy with chronic levels of labour shortages.

From the foregoing, we recommend a number of measures that would aim at addressing inequality and access to specific needs from both workers and businesses in the food and accommodation sector. Firstly, there should be consistent financial support for workers in the hospitality sector. Secondly, steps should be taken by the government to reduce the level of uncertainty in the sector. From the foregoing, we noticed that during the pandemic there was much uncertainty since the staff could not work consistently as a result of frequent measures to contain the spread of the pandemic. Many workers got infected and had to stay home for several days. Thirdly, temporary workers like students felt the brunt of the lay-offs since most of their contracts gave them little or no unemployment benefits. Next, income gaps between the rich and the poor has increased as a result of the pandemic. The government should articulate important reforms that will go a long way to encourage the workers of the sector.

Questionnaire on the Impact of Covid-19 Pandemic

This questionnaire is designed as part of an ongoing research on my advanced master's thesis entitled **The Impact of Covid-19 Pandemic on the Hospitality Sector in Belgium (Louvain School of Management, UCL)**. It is designed to evoke objective responses from respondents in the HORECA sector. Privacy and issues on quality criteria are taken care of. The respondents remain anonymous and the results of the research will be published in the thesis and it is purely for academic purposes. The researcher is grateful to all those who have accepted to respond to the questions.

***Required**

1. Name of the business or enterprise you own or work for *

2. Type of business (Hotel, B&B, Restaurant, catering services, et cetera) *

Mark only one oval.

- ☐ Hotel
- ☐ Bread & Breakfast
- ☐ Restaurant
- ☐ Catering Services (Service Traiteur)
- ☐ café (Bar)

3. 1. What best describes the size of your business or enterprise ? *

Tick all that apply.

- ☐ Very Big
- ☐ Big
- ☐ Medium
- ☐ Small
- ☐ Very Small

4. 2. What best describes your HORECA scale? *

Mark only one oval.

- ☐ National
- ☐ Regional
- ☐ Global
- ☐ Local
- ☐ Other please specify

5. 3. What best describes your role?

Mark only one oval.

- ☐ Owner of Hotel/Restaurant-Café/Bar/
- ☐ Manager of any of the above
- ☐ Staff in any of the above

6. 4. How long has your business unit or enterprise been in operation (before the pandemic)? *

Mark only one oval.

- ☐ 1 year
- ☐ 2 years
- ☐ 3 years
- ☐ 4 years
- ☐ 5 years
- ☐ More than 5 but less than 10 years
- ☐ 10 years and more
- ☐ Other: _____

7. 5. Please rank the most challenging or concerning aspects of COVID-19 (#1 being the most challenging and #5 being the least challenging).

Tick all that apply.

	Least Challenging	Mildly challenging	Challenging	Considerably challenging	Most challenging
Loss of Revenue	☐	☐	☐	☐	☐
Safety of our employees or guests	☐	☐	☐	☐	☐
Employee Mental Health (Depression, loneliness, fear, uncertainty, et cetera)	☐	☐	☐	☐	☐
Shifting staff role or furloughs	☐	☐	☐	☐	☐
Long-term planning	☐	☐	☐	☐	☐

8. 6. What strategies did you deploy to help maintain day-to-day operations during the pandemic?

Mark only one oval.

- ☐ Rotate staff
☐ Reduce offer
☐ Recruit more temporary employees
☐ Migrate to online activities
☐ Option 5
☐ Other: _____

9. 7. Did the business have any off-premise technology in place prior to the pandemic?

Mark only one oval.

☐ Yes

☐ No

☐ Maybe

10. 8. On a score between 1-10 how active was the business during the pandemic?

Mark only one oval.

Least Active

1

☐

2

☐

3

☐

4

☐

5

☐

6

☐

7

☐

8

☐

9

☐

10

☐

Highly Active

11. 9. What specific pieces of technology have been essential in maintaining operations during this time? (Write N/A if not applicable).

12. 10. What is the expected time frame to recover and recoup any losses after the pandemic has ended?

Mark only one oval.

☐ 6-10 months

☐ 10-12 months

☐ 1 year

☐ 18 months

☐ 2 years

☐ Other: _____

13. 11. What kind of support did you receive from the Federal Government during the pandemic?

14. 12. What will be your main focus once the pandemic is contained? Only for owners of HORECA business

15. 13. What would you want the government to do when the pandemic is fully contained?

16. 14. What lessons have you learned since the emergence of the pandemic?

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