

Tourism in Tunisia after the Terrorist Attacks of 2015: A Road Map for Long-Lasting Resilience

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ABSTRACT

Tunisia experienced three very deadly terrorist attacks in 2015, two of which directly targeted tourism and experienced an unprecedented tourism crisis, but Tunisian tourism has been able to rebound and show that it has a capacity for resilience. Given the existence of anomalies in the tourism sector in Tunisia, it is necessary to think carefully about strategic actions to make the recovery of tourism structural and not a cyclical one. The objective of this article is to identify this anomaly and explore the strategic actions to ensure a long-lasting resilience. The literature on crisis and resilience was used as a theoretical framework, while qualitative research and content analysis were used respectively to collect and analyse the data. The results show that the tourism sector in Tunisia requires rethinking the market strategy on the one hand, and the marketing strategy on the other hand, the enhancement of the regional heritage, the creation of initiative unions, the development of infrastructures and sanitation of the tourist surrounding. These strategic actions, once implemented, will be able to resolve many of the weaknesses identified in the framework of this research and ensure the lasting resilience of tourism in Tunisia.

Keywords: Tourism -Tunisia - Crisis - Crisis management - Resilience - Strategic actions -Weaknesses-Content analysis.

INTRODUCTION

Tourism is a key sector in Tunisia since its share of the country's GNP is 15.1%. Following the political unrest early in 2011 and the terrorist attacks in 2015, the sector, has sunk into a deep crisis causing a drop in its foreign exchange earnings and affecting its brand image. According to Paraskevas and Arendell, Pratt (2003), Dean (2002), Feichtinger et al (2001) and Sonmez. (1998), terrorism is one of the crisis factors that has the greatest impact on tourism activity.

Faced with this critical situation, efforts have been deployed by Tunisian government, the Tunisian National Tourism Office and the various associated bodies to envisage and put in place a strategy of resilience for Tunisia as a tourist attraction. This strategy aims not to face

the perils but to minimize their impacts as much as possible (Dauphine & Provitolo, 2007). Indeed, it seems that it is difficult to prevent the events at the origin of this crisis; adapting to it and seeking to mitigate its negative effects seem to be the most suitable solution.

Establishing resilience is only one phase in the broader conception of crisis management. According to Meyer's (1982) seminal work, during the resilience phase, organizations and government bodies should consider first-rate responses to absorb the shock and limit the sector's losses. More strategic decisions would follow so as to insure a long-lasting resilience.

Thus, Tunisia has adopted an urgency plan to absorb the shock and has shown great resilience capability. Indeed, since October 2016, Tunisia, as a destination, has been the favorite

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destination especially for the Russian and Algerian tourists (see Chart 1). The Russian market, which has been growing steadily, still represents around 700,000 of customers. However, one should not deny that real recovery

began in 2017 with the steady comeback of the European market. It is worth to note here that we are taking into account the year 2014 as reference point. This corresponds respectively to the year prior to the terrorist attacks of 2015.

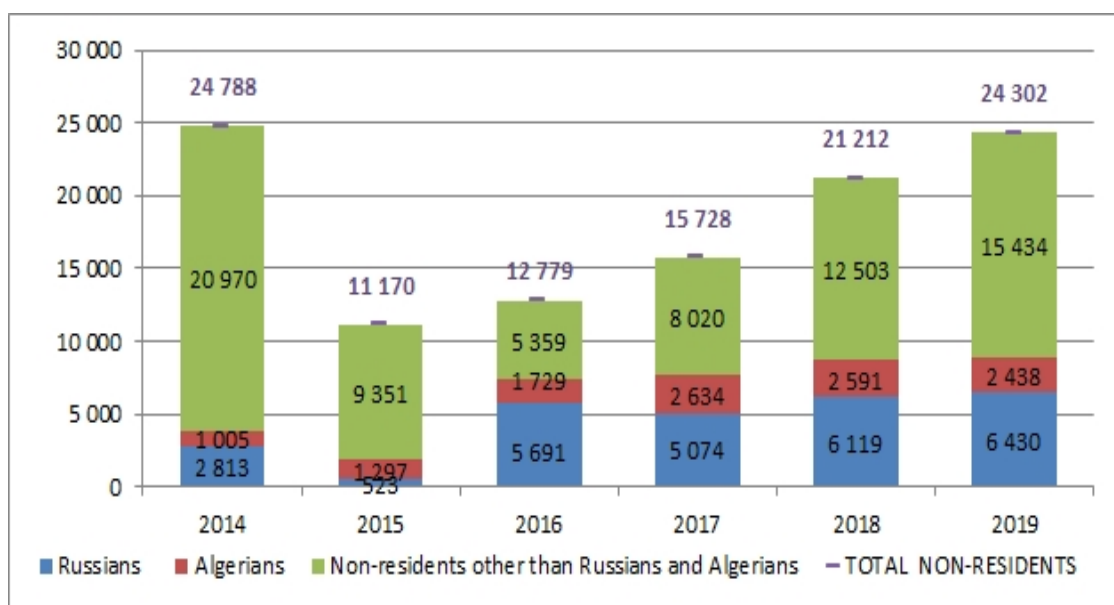


Chart1. The overnight stays of non-residents by nationality

Source: Central Bank of Tunisia

In 2018, tourism in Tunisia has experienced a strong recovery, that's why Jean-Pierre Mas, the president of Travel companies, has indicated that: "Tunisia has returned, or almost, to its level before the Arab spring". Thus, the recovery was

confirmed in 2018 with the arrival of more than 8 million tourists and a revenue growth of 14.2% in TND, equivalent to -17.7% in euros (given the depreciation in recent years of the Dinar against the euro as appeared in table 1).

Table1. Evolution of tourism revenues in TND and equivalents in EURO

Year	2014	2015	2016	2017	2018	2019
Tourism revenues in MTND*	3626	2415	2373	2831	4141	5619
Tourism revenues in EUROS	1609	1109	1000	1039	1324	1710
Annual average exchange rate EURO/TND	2,253	2,177	2,374	2,724	3,127	3,286
Change RT (in MTND)		-33,4%	-34,5%	-21,9%	14,2%	55,0%
Change RT (in EURO)		-31,1%	-37,9%	-35,4%	-17,7%	6,3%

Source: Central Bank of Tunisia

* MTND: Million Tunisian Dinars

It should be noted that in 2018, the return of European tourists is still below the level of 2014 (See Chart 2). In 2019, Tunisia has carried on this trend and tourism has welcomed more than 9 million tourists.

According to the current director general of the national office of tourism in Tunisia (NOTT), the tourist flow has achieved from January 1st to February 20th, 2020 an increase of 7% in comparison with the same period of the year

2019. However, despite the good performance achieved in 2019 and the two first months of the year 2020, the tourism sector in Tunisia is struggling to recover given its weaknesses. It needs other strategic actions to build a sustainable resilience strategy enabling it to improve its brand image.

The objective of this research is to identify the weaknesses of the sector and explore strategic

actions that will insure a long-lasting resilience. This objective will allow us to answer the following two research questions (RQ):

RQ1: What are the weaknesses of the tourism sector in Tunisia?

RQ2: What strategic actions can be advanced to insure a long-lasting resilience?

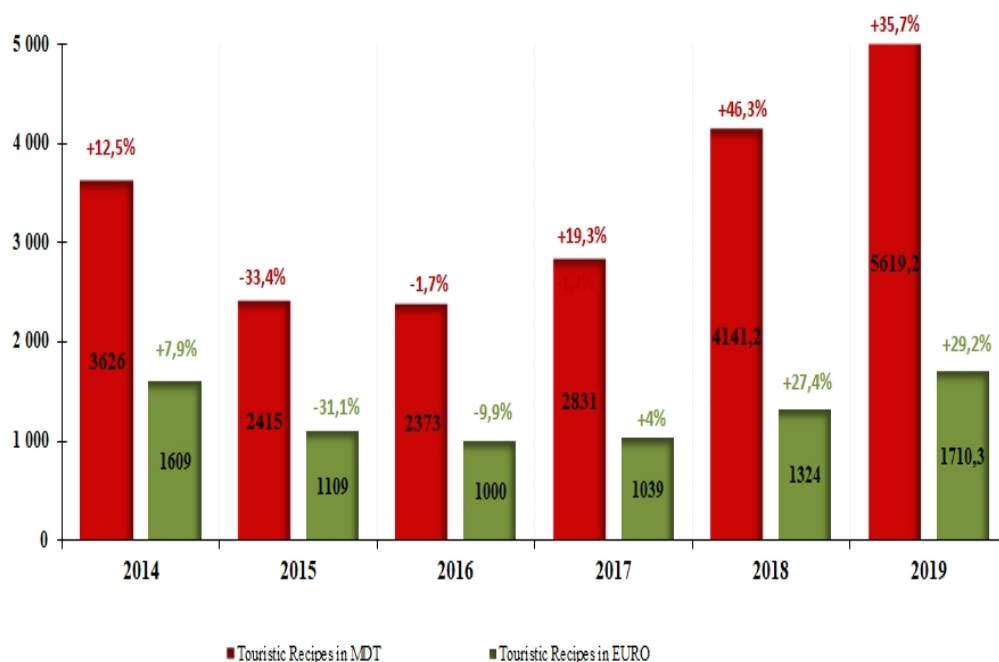


Chart2. Evolution of touristic recipes in TND and equivalents in EURO

Source: Touristic Recipes: CBT (Central Bank of Tunisia)

The structure of the paper is organized as follows. Part 1 reviews the literature on crisis and resilience as theoretical framework. Part 2 outlines the methodology and describes the methods adopted for data collection and analysis. Part 3 presented the results of research. The last part outlines the discussion of results, research limitations, futures research avenues and recommendations.

Theoretical Framework

The Crisis

The crisis is a complex concept, encompassing several factors and elements; this makes it virtually difficult to make an agreed-upon or thoroughgoing definition of the concept. Incidents, surprise, and panic are the most important elements to describe a critical situation (Lehu, 1998; Bland, 1998; Westphalen, 1998). Crises in Tourism are characterized by unpredictability.

Terrorist attacks are usually abrupt and in most cases precaution measures do not prevent the attacks. The crisis is, therefore, a serious threat to a stable and balanced situation (Lehu, 1998; Bland, 1998; Westphalen, 1998). More optimistic researchers see the crisis as an opportunity with

strong evolutionary power for the sector, a trigger to change, and a process of transformation (Ogrizek & Guillevy, 1997; Roux-Duford, 2000; Libaert, 2000).

Besides, Lagadec (1991) defined the crisis as the loss of some reference systems together with the difficulty in dealing with the situation in hand. Reilly (1993), however, sees the crisis as a major, sudden, resource intensive, harmful and disruptive situation.

It generally falls outside the typical management procedures, operating frameworks, and reference schemes of the organization.

This last criterion, according to Roux-Duford (2000), is the sine qua non condition in describing a crisis and in deciding whether a situation is critical. Here, the concept, as forwarded by Lagadec (1991), Reilly (1993), and Roux-Duford (2000), is that of the reference system.

This concept is rather interesting since - by reasoning by analogy-the reference system for Tunisia corresponds to a positive image and a favorable perception of a tourist destination that was hugely shaken right from the onset of the crisis. The deliberating challenge that tourism

professionals face lies in rebuilding this reference system.

Resilience

The situation 'crisis' is the sine qua non for building resilience. Authors such as Tisseron (2009), Gadeau (2008), and Quenault (2013) referred to the notion of resilience as the business's ability to rebound after the crisis. Others authors, however, did not share this viewpoint. For example, Carpenter et al. (2001), Folke (2006), and Stickland-Munro et al. (2010) defined the concept within a broader perspective other than just the ability of a system to recover from the crisis. Resilience, therefore, reduces the vulnerability of the business by making fundamental system-wide changes. It is, also, a strategic tool in the resilience process (Dauphine & Provitolo, 2007).

Resilience in the literature about tourism is often discussed within the broader context of tourist destination. The tourist attraction tries to resist and recover after terrorist hits, huge damage from natural disasters, health crises, or security risks. According to Sarrasin and Renaud (2014), Annelies (2005), and Unver (2016), these catastrophes put the development projects of the destination on a halt and forces governments to intervene and take necessary measures to boost the sector and set up strong resilience schemes.

Building a resilience strategy can be achieved through the adoption of appropriate operational and strategic measures. Operational measures are mainly about resistance or reactive strategy (Dauphine & Provitolo, 2007). They are also called the single-loop learning phase according to Argyris and Schone (1978). Strategic measures, however, also known as double-loop learning (Argyris & Schone, 1978). They build resilience or proactive strategy in the sense used by Dauphine and Provitolo (2007). According to Roux-Dufort (2004), resilience goes through two periods. The first concerns the period extending from the onset of the crisis to the return to normal and focuses on absorbing the shock, while the second period includes the post-crisis period during which the organisation can initiate changes to avoid new crises. These two periods are known in the literature relating to resilience through the regressive and progressive vision.

Methodology

To meet the objective of this research, a collect of data was deemed necessary. data is gathered through qualitative research. The qualitative

research is based on fifteen semi-structured interviews that were conducted from June to August 2019.

Five interviewees were tourism experts working in Tunisian National Tourist Office (TNTO), the Ministry of Tourism, the Tunisian Federation of Travel Agencies (FTAV), and the National Union of Hotel Industry (UNIH). The other interviewees were managers from travel agencies, hotels and tour guides.

The semi-structured interviews were conducted face to face. Interviews were recorded and transcribed verbatim. A content analysis of the interviews was conducted (Berelson,1952).

Results of Research

The content analysis has enabled us to identify the weaknesses of the sector and all the strategic actions that will ensure long-lasting resilience of tourism in Tunisia.

Weaknesses

The weakness that was raised by almost all the interviewees is the absence of a crisis strategy for the tourism sector in Tunisia. Tourism actors have never been prepared for the management of a tourism crisis. In addition, several other weaknesses have been mentioned. Tunisia is focalized on mass seaside tourism; this gives the image that Tunisia is a cheap single-product destination. This reductive image has made it difficult to fill hotel rooms during periods of medium and low seasons. The seasonality aspect of tourism is a major weakness of tourism in Tunisia. According to experts, the tourist season does not exceed 7 months since it usually starts in April and continues until October with the peak season in July and August.

Tourism in Tunisia is also held behind its full potential by the lack of regular air traffic especially the direct lines, low charter air capacity, and the concentration of scheduled flights on the capital Tunis.

Several hotels are highly indebted and, as a result, they fail to provide the necessary maintenance and refurbishing. The small fleet is a big problem for travel agencies. A travel agency manager says, "We cannot do tourism if the fleet is poorly equipped that is to say lacking buses, mini-buses, micro-buses, 4WD, and small cars."

Another major challenge is the continuing worsening in the quality of services offered by some hotels and restaurants.

This is mainly due to the lack of well-trained staff. In fact, personnel, in the sector, is characterized by seasonality, low pay, and high mobility.

It is also worth noting that 90% of the Tunisian market is governed by tour operators. No less challenging is the deterioration of the environment especially after the “2011 revolution”.

Some interviewees stated other weaknesses such as the lack of promotion of tourism products, the unawareness of the wealth available to Tunisia, the inappropriate enhancement of cultural heritage, insufficient presence at international fairs, and the lack of social media as an element to develop sales. There is also the absence of duty-free policies, the non-compliance with the standard claim records that should normally be on the counters and reception desks, lack of animation activity especially on the beach and outside hotels, the decline in the number of movie theaters in Tunisia.

STRATEGIC ACTIONS FOR A LONG-LASTING RESILIENCE

The tourism sector in Tunisia requires rethinking the market strategy on the one hand, and the marketing strategy on the other hand, the enhancement of the regional heritage, the creation of initiative unions, the development of infrastructures and sanitation of the tourist surrounding. We will develop all these actions.

Rethinking the Market Strategy

Tunisia has not been able fully regains its traditional market and has lost its customers of the winter season after the terrorist attacks of 2015. According to some interviewees, it is high time for Tunisia to regain its off-season customers (Japanese and other tourists) and envisage limiting its dependence on its traditional markets. Thus, Tunisia should target the countries of the Middle East, sub-Saharan Africa, regain the trust of the Scandinavian markets and conquer the Asian market. Above all, domestic tourism should be enhanced since the local market proved to be a savior at the turbulent times. An expert in tourism told us that we must act quickly and renew our ties with twinned countries. To date, only 14 French cities are twinned with Tunisian cities.

It is, therefore, to the interest of Tunisian tourism to restore and tighten these relations because the advantage is twofold: they accrue experience and encourage more tourism.

In addition to the targeting strategy, another point was raised by tourism professionals and concerns the enhancement of other seasons other than the summer season, by positioning them as seasons in their own right. They find that "Thanks to our climate, we could develop sports tourism during the winter season (tennis and hiking for example) or the mechanical sport during the spring season (motorcycles, car rallies in the Sahara); from September to April, hunting tourism could be developed; octopus fishing and scuba diving can attract a great number of tourists from spring to autumn. ».

Rethinking the Marketing Strategy

This action consists of the following elements: improve the tourist product, avoiding price-cutting, distribute and communicate differently.

IMPROVE THE TOURIST PRODUCT

By improving the product, we mean improving transportation, accommodation, entertainment, catering, and the diversification of the offer. Hence, as far as accommodation is concerned, it is urgent to solve the daunting problem of the indebtedness of hotels. No less urgent is reopening the hotels that were shut down because of financial issues especially that Tunisia welcomed 9 million tourists in 2019. The reclassification of hotels that are not worthy of the 4 or 5-star category requires unannounced visits by tourism inspectors so that they can classify the hotels in the category they deserve. Overbooking is another challenge to be dealt with. Hotel professionals must respect their commitment and stop giving an already booked room to a new client. As for transport, it is necessary to renew and strengthen the rolling park; develop air transport between Tunisia and Russia while intensifying charter flights with the main basins that transmit Russian tourists, namely Mouscou, Petersburg; opening the direct flights which makes it possible to develop customer loyalty.

Tunisia can also work on the diversification of the offer. The country does not lack assets to develop its tourism. For example, we can mention cultural tourism, health tourism, golf, religious tourism, and alternative tourism. Thus, to be able to keep up adequately with global tourism demand, the sector should be further segmented and diversified. In order to develop cultural tourism, actors should first highlight the country's unique historical and archaeological heritage and animate its major sites, give them means of accommodation and entertainment to

integrate into real cultural circuits. In addition to visiting museums, archaeological sites, and historical monuments, the tourist should be more involved and integrated into the cultural activities of the country. Undeniably, the tourist's attitude has changed and they often look for lived experience. They seek to get in touch with the indigenous people and be indulged into the local culture.

Another important aspect of enhancing the product is the development of health tourism. Tunisia has all the conditions of success to be a destination of health tourism. The country enjoys a cadre of well-established health professionals with large medical expertise. A large number of centers of thalassotherapy (60 centers) are spread along its coasts (Carthage coast, Tabarka, Korba, Hammamet, Sousse-Port El Kantaoui). Tunisia has a large experience in thalassotherapy (dating back to 1994), cosmetic surgery, the recognized quality of thermal springs. Added to that, care fees in Tunisia are very competitive. Hence, in order to better organize the sector and enhance its competitiveness, the Tunisian Agency for the Exportation and Promotion of Health Services should be established.

There is also the need for state commitment for the promotion of health tourism and well fare. One interviewee, states that medical tourism is a niche market that targets old people who suffer from Alzheimer disease. He indicates that these patients are always accompanied by their relatives and this can be a source of more income for hotels.

Another aspect to promote is religious tourism. One interviewee, a tourist guide, considers religious tourism as a tourist niche to be promoted. Pertinently, he asks the question: "Why don't we think of religious itineraries that combine visits to religious sites and discovery of religious monuments in Tunisia? He proposes three itineraries to develop. First, there are the Islamic monuments including the city of Kairouan, the second holy city of Islam. Second, Christian monuments including mainly the old Saint Louis church, the Cathedral of Tunis and other Christian monuments in Tunisia. Third, we have the Hebrew monuments where tourists could visit the synagogue of Tunis and the Synagogue of "Ghriba" in Djerba. Visits to the cemeteries can also give the tourists a taste the local traditions, rituals, and beliefs. As reported for cultural tourism, again, the religious journey should not be limited to visits to churches.

Tourists like to take part in devotions with the locals, to socialize with them and to enjoy moments of exchange and sharing.

We couldn't talk about tourism product without talking about services. In this regard, an interviewee said that in the choice of a destination, tourists consider the quality of Duty-free zones. He added, "Duty free is the first service expected by Chinese travelers when they go abroad ". He ends up asking the question:" Why don't we have duty-free shopping areas in Tunisia?

Avoid Price-Cutting

A tourism professional stated that, as a hosting country, Tunisia lacks appeal; tourists come mainly because of low prices while we have the means to be as attractive as the pyramids of Egypt. We have the most beautiful sites in the world (like Dougga and Bulla Regia). He stressed that, the image of Tunisia should therefore be raised by focusing on the unique and specific wealth of Tunisia as a destination.

Distribute Differently

Extending cooperation beyond the traditional players in the field (tour operators and travel agencies) is an urgent need. This is urgent so that we can circumvent the prices sold by large tour operators, especially those in Northern Europe who enjoy a virtual monopoly over the markets. Such a decision can, perhaps, ensure the independence of the TOs and it, necessarily, makes use of social media. In this vein, hotel professionals should think about managing their bookings over the Internet rather than through TOs.

Communicate Differently

Just after the terrorist attacks of 2015, new methods of communication have already been put in place. They consist of the adoption of an innovative and intelligent communication strategy based on the use of Buzz, digital, You-Tubers and foreign bloggers. Other communication measures were also raised and concern lobbying through the use of foreign media, attracting large hotel chains and the labelling of airports.

Foreign media lobbying aims to save the image of Tunisia and reinstate it as a destination with great potential. At the same level, appealing to the major hotel chains in Tunisia, such as Sheraton, Hilton, and Golden Tulip would enhance the attractiveness of the destination and its brand image to tour operators and tourists around the world. This is very positive

advertisement that shows the trust of the major world-famous hotel chains in Tunisia.

Labeling of airports in Tunisia is an aspect to work on. An expert from the Civil Aviation and Airports Office proposed to put a slogan winning the spirit of the tourist for each airport. He proposed the following slogans. The slogan for Carthage airport should be "At the gates of Carthage"; for Tabarka airport, "ecological and cultural charm", for Gafsa airport, it should be "Capsa: Hercules's work of art". Gabes airport would be labelled "Gabes: the oasis in the water", for Sfax airport, the slogan would be: "Sfax, the economic flight". Djerba airport would be "Djerba, the stopover of Ulysses", and Tozeur airport would be: "Tozeur: on the footsteps of the little prince".

Enhancing the Regional Heritage

Some respondents stressed the need to put the region at the heart of the tourism product. They consider that each region of Tunisia has its own riches and uniqueness that should be highlighted. For example, each region in Tunisia has its own the culinary traditions, the products of its soil, its handicraft products, the clothes worn by brides, its accommodation, the singularity of its architecture, etc.

One of the respondents, who is a travel agency manager, said that all regions of Tunisia are touristic. He pertinently wonders: "Why don't we produce models that are representative of each region?". He recommends labelling certain Tunisian regions such as Tozeur, Hammamet and giving the typical cachet of each region on an international scale. He adds that local culinary specialities are becoming increasingly important in the choice of a destination and that it is high time to list, classify, inventory and archive them for adoption by UNESCO; not only as a destination but also as part of the heritage of humanity. Many other countries have done so with great success.

In the same vein, another interviewee added that we should stop communicating and marketing Tunisia as a whole. Instead, we should be specific and communicate the specificities and peculiarities of each region. As he narrates, even during tourism fairs, there should be a pavilion for each region; Turkey tourism professionals are practicing this, and it seems rewarding. The aim, here, is to bring the potential and wealth of each region to the upfront. The interviewee drew our attention to the fact that to attract to more tourists, Tunisia should also look for what

distinguishes each region in relation to the world.

Create Initiative Unions

To implement the idea of the census and the promotion of the regional heritage, Tunisia should create initiative unions as they exist everywhere in all Europeans countries.

These are private organizations that help in the development of tourism of their regions. They use all the assets of their town or region to create a tourist offer and promote it through guides and brochures. initiative unions are composed of all actors involved in the tourist circuit: hotels, guest houses, restaurants, travel agencies...

Enhance the Infrastructure

The infrastructure in Tunisia is old and it needs refurbishing. According to an executive of Tunisian National Tourist Office, it is time to think about having Airports which meet international standards. He stressed that it is necessary to consider the possibility of expanding the Carthage airport, developing the one of Sfax airport and well exploiting Djerba and Tozeur airport.

Sanitation of the Tourist Surroundings

There is need to improve the tourist environment, especially at the level of circuits visited by tourists. This is mandatory if we hope to make the tourist leave with a good impression on the Tunisian sites. Concerning the cleanliness of the environment, a tour guide interviewed said: "I am a guide and I clean my Tunisia, it is a great initiative to support, to promote, to sensitize and to generalize this practice".

DISCUSSION

This research was an opportunity to listen to tourism actors talk about the weaknesses of the Tunisian tourism sector and to highlight possible strategic actions to ensure sustainable resilience. While some of the weaknesses of the sector advanced in this research are considered classic and have long been denounced in reports, studies, meetings, seminars, press articles, other weaknesses such as the absence of duty free policies, the absence of a crisis strategy, the lack of valorization of the heritage, the hegemony of tour operators, the absence of an initiative unions, the small fleet, insufficient presence at international fairs, insufficient presence on social networks -to promote Tunisia as a destination and create a certain

independence from tour operators- have not been much talked about.

It is more than urgent to use social media since the Opodo barometer, which measures the evolution of tourist departures and their behavior in the booking of their stays has shown that eight out of ten tourists book their stay online, one in three tourists buy their stay while sitting behind their screens and 46% of 20-29-year olds say they are unable to go on vacation without their smartphone.

The results of the research show that the improvements that are likely to revive the tourism sector in Tunisia and avoid new crises are several and complementary. They cover the tourist product, distribution, communication, tourist demand but also the environment. These results confirm the finding of Ogrizek & Guillevy, 1997; Roux- Duford, 2000; Libaert, 2000 which see the crisis as an opportunity with strong evolutionary power for the sector, a trigger to change, and a process of transformation.

One of this research results show that alongside traditional and seasonal tourism, health, cultural and religious tourism are new activities to be developed since they are not affected by seasonality and they are, also, available all along the year. This result corroborates what Cuvelier (2000) pointed out: "We must change the idea of mass tourism, but a mass made by the addition of different kinds of tourists, spread throughout the year occupying different spaces and coming at different times".

No one can deny that the implementation of these changes is dependent on coordination between different skills in a range of ministers responsible for finance, trade, culture, transport, environment, regional development, industry . These are the key players on whom the successful implementation of the strategic actions developed above depends. Indeed, tourism cannot work alone, as it is linked to transport, culture, environment, and safety.

Moreover, the multiplicity of the strategic actions to be carried out and the actors involved give us avenues for thought on certain elements. On the one hand, the speed with which the revival of tourism in Tunisia will take place and on the other hand, the budget that should be devoted to being able to implement these actions. Some changes require a huge budget while others must be part of a long-term perspective. For example, the enhancement of cultural heritage is a long-term intervention that

can only produce tangible results after 20 or 25 years. Of course, the changes will be neither rapid nor easy, but unavoidable.

CONCLUSION

This research reveals the weaknesses of the Tunisian tourism sector and highlights strategic actions that enable sustainable, innovative, and resilient tourism.

As regards the weaknesses, they are several. They relate to the absence of diversification of the tourist product, the qualification of Tunisia as a low end destination, the price selling off, the poor quality of services, the hegemony of tour operators, the high indebtedness of hotelkeepers, the absence of duty free policies, the lack of animation , the absence of a crisis strategy, the lack of valorization of the heritage, the absence of an initiative unions , insufficient presence on social networks, seasonality aspect of tourism, the small fleet, insufficient presence at international fairs, lack of regular traffic.

As far as strategic actions, it is a need to rethink the market strategy and marketing strategy, to develop regional heritage, create initiative unions, enhance the infrastructure and sanitation of the tourist surroundings.

All these strategic actions could constitute a road map to build a long-lasting resilience of the Tunisian tourism sector and avoid the weaknesses that we have been able to identify.

Despite the importance of the results of this research, this work has a number of limitations that suggest future research avenues. The first limitation of the research relates to the number of strategic actions identified in this research. Although they are certainly fundamental, they are not sufficiently explicit to be implemented. Future investigations could focus on one of the actions forwarded in this research by studying, for example, the role of the initiative unions in the promotion of regional heritage. Regional diversity is an asset that can be researched since each region can be a destination in its own right.

The second limitation is inherent to the non-consideration of the crisis linked to the Covid-19 pandemic which marked the year 2020. Tunisia, like many other countries, has known, a difficult and very particular period where everything has been stopped. In fact, since mid-March 2020, the sector of tourism is in cessation of activity. Future research will need to focus on the management of this sanitary crisis in Tunisia. As recommendations, we propose that all actors,

such as the government, hotel managers, bankers, ministries, should be involved in the realization of this roadmap to move towards sustainable, innovative and resilient tourism.

All the strategic actions resulting from this research should be implemented without missing to follow the recommendations of the White paper, which aims to solve the problem of the indebtedness of the tourism sector.

A reliable and regular Tourist Satellite Account needs to be established and delegated to the National Institute Of statistics (NIS). Not only does this account assesses the real share of tourism in the economy but also establish action plans. Finally, the Tunisian government should also declare tourism a priority sector.

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