

EDITORIAL

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Tourism has been the sector most severely affected by the Covid-19 pandemic. Manufactured goods, apart the initial shutdown of non-essential goods, has quickly adjusted with an acceleration toward the on-line delivery and away from the physical shops. The shock has been instead much harder for the sectors supplying time-consuming services (personal services, hospitality) for which the on-line substitution is limited or impossible. To the tourism industry, the pandemic constitutes therefore a shock of unforeseen and unprecedented intensity, and a vital challenge to its survival. We can describe the pandemic as a series of similar pervasive, highly temporally and geographically correlated shock, characterized by mechanism of transmissions which differ over time and places. Unsurprisingly, the consequences have been different for different tourism destinations.

In most countries, the death toll is still rising and social distancing and several other limitations are still into effect, but as vaccinations continues at a steady rate, the situation could be brought back under control in the future. This means also the progressive reopening of tourism activities and the resurgence of touristic flows.

In general, some of adjustments swiftly adopted in order to contain the widespread diffusion of the pandemic, will be long-lasting or even permanent. Two obvious examples are the large-scale forced adoption of the smart (home-)working and of the on-line shopping. Hence, the face-to-face contacts between retailers and customers have been significantly reduced, and digital meetings have often replaced the direct interpersonal interactions. The traditional workplaces will be reshaped and reduced, also because we realize that the benefits of the economies of (physical) agglomeration have been overestimated. Several firms and industries, forced within weeks towards a widespread use of the digital techniques, are now finding them profitable and are evaluating costs and benefits of a permanent adjustment. Smart working and virtual meetings made available by the digitalization are in several instances less direct and efficient than that the traditional business practices, but less than expected. Going digital has often been quicker and easier than expected.

Also business travels, live meetings, conferences and fairs have been replaced by time- and money-saving virtual meetings. The change is perhaps less marked for B2B fairs than for more popular, overcrowded B2C fairs (like the art fairs). As the substitution process depends solely upon efficiency consideration, these traditional forms of

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business tourism are not expected, also in the medium run, to regain the role they had in the previous pre-pandemic period.

Leisure tourism suffered the pandemic shock at least as much business tourism. The demand for outdoor recreational activities has been, and currently is, severely constrained, often limited to domestic or even proximity tourism. Virtual products were available well before the lockdown and the closure of the museums. But the digital experiences never gained the favor of the customers, being a very poor substitute for a real travel, to the attendance of a live performance, to the visit to a museum or a cultural site.

This rather obvious point has a few, perhaps less obvious, implications. The severe rationing of the traditional demand of tourism goods and services has suggested the building up of a potential large demand which, whenever possible, will emerge. Hence, hotels, restaurants and the rest of the industry are asking for immediate financial allowances and debt reliefs to pass through this difficult period. As a strong rebound of the traditional leisure services is expected, the supply side often (possibly too often) looks at the pandemic in terms of an exceptionally strong negative shock, but temporary notwithstanding. In other terms, there is perhaps a limited awareness of the long-lasting consequences of the pandemic and a possible tendency to disregard the required adjustments of the business model.

As the Covid shock exerts quite different effects of specific segments of the demand and on the supply of the tourism sector, it is difficult to give a consistent picture of the consequences of the pandemic. This special issue of AlmaTourism therefore focuses on specific cases and sketches different effects of the consequences of the Covid 19. Even if necessarily partial, the papers presented provide a suggestive picture of the situation and a series of insightful evaluations, with a particular focus on the Italian case.

The paper by Aliprandi and Cruz (*From epidemics to pandemic: Research suggestions to support tourism destinations*) shows how the tourism industry had reacted to previous similar episodes. There are crucial differences between the current situation and the previous (SARS, avian flu, MERS and others) epidemics, which arose mainly in geographically limited areas and in peripheral tourism markets. In these epidemic cases the severity of the risks was minor, the most important countries of origin of the tourist flows were not hit and the overall demand for tourist goods and services was almost unaffected. Also, the geographical limitation of the epidemic made possible immediate an substitution away from the interested destinations to others. Finally, previous epidemics were successfully contained within relatively short periods. These episodes can be considered asymmetric shocks affecting specific segment of the market, with a worsening in the relative competitive position of the (few) interested destinations.

In Covid case, an almost symmetric shock interested market as a whole, even if with some differences in intensity and timing for groups of tourists and specific destinations. Different destinations were repeatedly affected the virus waves with different intensity at different times. The rebound of the flows will be gradual and conditional on

dynamics of the pandemic, subject to country-specific policies with stops and reversals. Some countries that have progressed faster than others in the vaccination programs, or that have a more tolerant attitude toward the pandemic, are likely to gain a temporary advantage in the “back to normal” race. However, a full return to the previous framework is unlikely. The pre-pandemic competition between destinations, based on a mix of price, quantity and quality of the holiday experience has changed. From now on, because of the risk aversion of the tourists and of the public authorities, a key competitive advantage is now the safety level of the destination and the travel. Hence, the current (as well future) tourist’s decision to select a specific destination, depends on the traditional characteristics of the destinations like the cultural and natural attractions, but also on the evaluation of the several previously unperceived or overlooked, health-related risks of the destinations, like the degree of congestion, pollution, the level of anthropic degradation and the low quality of the health system. As the global diffusion of the virus is leading to a series of mutations, the containment of the pandemic is still uncertain, and the selection of a low-risk holiday or a safe tourist destination remains difficult to obtain. A clearly designed and health plans swiftly implemented and reliably communicated could reduce these uncertainties. A credible communication policy (like the one developed for the small Greek islands) does not ignore but actively manages and reduces the risks faced by the tourists, and could lead the destination to gain a competitive advantage.

Similar shocks are likely to exert different impacts for tourism companies of different sizes. Large, sometimes international, companies have larger resources, both managerial and financial and, to some extent, can exploit product diversification strategies. Small and medium enterprises linked to a single destination, are less diversified and more fragile, even if the informality of their structure might enhance their resilience. The final outcome crucially depends again on the tourism specialization of the destination and the development of effective destination policies, well beyond the control of the typical micro- or small tourist firm.

The typology of the destination matters too. The superstar, often overcrowded urban destinations have suffered a more intense drop in the demand than rural tourism. The stays in the countryside or in small villages and rural itineraries off well known touristic flows have been perceived as less risky, being characterized by a low population density. In general, proximity tourism has been offered a chance to reduce the progressive marginalization experienced in the recent years of increasing globalization. Also, there was a shift in the typology of preferred accommodation for the holidays. During the pandemic, rented or owned private houses which allowed for a greater control of the social distancing, have been often preferred to hotels and other high-density accommodations.

In many cases these changes were forced by the current unfortunate circumstances, and the domestic or proximity tourism has been considered a second-best in the preferences of the tourists – a temporary solution to be left when it will be possible to revert back to more traditional destinations. However, some of these benefits accruing to these marginal (and possibly underrated) destinations can be prolonged by improvements of the quality of the tourist supply and carefully promotional campaigns.

Some of these marginal destinations can improve their position on the tourist market and a carefully managed destination policy might turn the previous weaknesses into strengths, as in the case study analyzed in the paper by Lemmi and Deri (*A new model for the 'tourism renaissance': the case study of the Tuscan village of San Pellegrino in Alpe*).

The importance of the pandemic for the tourists depend on several factors. The drop in demand has been stronger for those who suffered more serious economic consequences because of the pandemic, like a job loss, but other factors are relevant. The demand is also influenced by the way Covid has been perceived by the (potential) tourist through (direct or indirect) personal experiences with the pandemic, on the attitude towards risk of the tourists, on their cultural status, education level, gender and age. An interesting and compelling distinction concerns the “young” tourists and the “senior” tourists. The paper by Zambianchi (*The collective traumatic event of COVID-19 Pandemia and its psychological impact on beliefs and intentions of senior Italian tourist. Implications and suggestions for tourism policies*) shows that the elder (even those retired) have developed active lifestyles over time. “Senior” tourism is an important feature in the picture. However, the pandemic constitutes a serious challenge to this flourishing segment. The virus has limited lethal consequences for the young, often characterized also by a low risk aversion, and a lower than expected societal empathy toward the elder. The impact of the pandemic has proven to be much more serious for this latter group. The paper convincingly showed that seniors, with more precarious health conditions and higher fragility to the virus, have high risk aversion, anxiety and fear. Carefully designed supply and demand adjustments could reduce the risk of contagion, such that senior tourists could be induced to continue their experience. The relevance of the point goes well beyond this troubled period. In a long-run perspective, the demand for “longevity tourism” will increase, in line with the acceleration of the ageing process in the advanced countries.

The actual exit from this painful situation requires a gradualist and patient strategy. Any attempt to control the growing aggregate risks we are becoming aware (pandemic risk, but also climate change risks) requires the implementation of a resilient strategy. In general, households, firms and institutions at various institutional levels are required to go beyond a passive adaptation to the current as well future shocks.

For the tourist market this means the capacity to identify the threats, and adjust timely the structure of the supply to the already working long-run trends. In particular, the threats faced by the Italian tourist industry are analyzed in the paper by Cocco (*COVID-19: Any Future Perspectives for tourism in Italy?*). The dimension of the typical firm of the Italian hospitality industry (particularly for the *hotellerie* sector) is quite small in comparison to those of the competitors. A positive consequence is the existence of a supply of hotels and restaurants widely spread throughout the country, usually with strong ties with the local territory, and the offer of a high-quality touristic experience. But the small dimension has also its drawbacks – the financial fragility, the lack of high-level professional figures and the delays in the use of up-to-date management technologies and communication strategies. A further peculiar difficulty of the small scale of the companies of the sector is the difficulties in the development and the

implementation of a consistent self-organized (bottom-up) adjustment strategy. The limited capacity of adjustment of the Italian hospitality sector is not new and does not depend upon the pandemic, as the attractiveness of the country on the global market has been falling over the last decades.

These long-term weaknesses, as well as an effective reaction to the Covid shock, require a series of structural adjustments. However, the top-down policies proposed at the local, regional and country levels have been limited in size and scope. This unfortunate situation is not surprising: the competences have been fragmented among several different shareholders as well as among sometimes conflicting institutional levels. The final outcome is the lack of elaboration of an inclusive and consistent strategy, capable of creating a real synergy among different destinations which, as a whole, constitutes an invaluable richness of the country.

In conclusion, the aim of this special issue of AlmaTourism is simply to offer some specific, and possibly stimulating, insights on the several different impacts that the Covid shock has had on the tourism industry, with particular reference to the Italian case. There are no simple or one-fit-for-all suggestions to be drawn, but the need to act both in terms of short-run containments of the effects of the pandemic, and adopting a structural perspective, with a full awareness of the long-term underlying trends.