EFFECTS OF COVID-19 ON TOURISM
Bozen, South Tyrol, Italy

October 21st, 2020

Center for Advanced Studies
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Survey among HGV members

**Participants:** hotels and restaurants (whole destination)

**Survey Period:** 3rd - 9th August 2020

**Survey Mode:** Online-survey, explorative survey

**Response rate:** appr. 16%

**Distribution of participants:** Responding firms correspond to HGV-member distribution

**Average Response Time:** 10 minutes
Survey among first guests after lockdown

Participants: Guests (23 towns/villages)

Survey Period: August 10th - October 4th, 2020

Survey Mode: Representative survey, direct interviews in hotels (using tablets)

Responses: 874 guests

Median Response Time: 12 minutes
How did Firms respond to Covid-19?
Business Model

Did you change your business model?

- We adjusted our cancellation policy: 60%
- We intensified our marketing efforts: 30%
- We focused on direct bookings: 40%
- We focused on regular guests: 60%

Source: Eurac, CAS
Measures

Which of the following measures did your firms take? (by industry)

- Reduce number of guests
- Change offered products/services
- Increase marketing activity
- Contact regular guests

Survey: Firms

Source: Eurac, CAS

N=659
Measures

Which of the following measures did your firms take? (hospitality sector by star category)

- Reduce number of guests
- Change offered products/services
- Increase marketing activity
- Contact regular guests

Source: Eurac, CAS

N=659
Did your firm change the following processes because of Covid-19?

- **Buffet, Table service, Service at bar**
  - Not at all: 15%
  - Slightly changed: 20%
  - Somewhat changed: 30%
  - Strongly changed: 20%
  - Completely changed: 15%

- **Entertainment in common areas**
  - Not at all: 20%
  - Slightly changed: 10%
  - Somewhat changed: 30%
  - Strongly changed: 20%
  - Completely changed: 20%

- **Wellness/ Sauna**
  - Not at all: 25%
  - Slightly changed: 20%
  - Somewhat changed: 25%
  - Strongly changed: 20%
  - Completely changed: 10%

Source: Eurac, CAS

Survey: Firms

N=659
Processes (cont'd)

Did your firm change the following processes because of Covid-19?

- Welcoming of guests/Check-in/Check-out
- Bring Guests to their room
- Guided tours/Leisure activities

Survey: Firms

Source: Eurac, CAS

N=659
Cooperation

Did the following ways of cooperation change because of Covid-19?

- Strongly increased
- Slightly increased
- Remained unchanged
- Slightly decreased
- Strongly decreased
- Average

Survey: Firms

Source: Eurac, CAS

N=659
Did guests change because of Covid-19?
Type of Guests

Change type of guests

Survey: Firms

- Single guests
- Families
- Groups

N=659

Strongly decreased
Slightly decreased
Remained unchanged
Slightly increased
Strongly increased
Average

Increase
Decrease
Regular Guests

Share of Regular Guests in Hospitality Sector – by star category
(August 2019 - August 2020)

Source: Eurac, CAS

N=659
Ease of Travel

Did Covid-19 influence the ease of travel? (Hospitality sector by star category)

Source: Eurac, CAS

N=659
How important is a direct relationship to your host?

- Very important: 66%
- Somewhat important: 27%
- Not very important: 7%
- Not important at all: 0%

Source: Eurac, CAS
Host-Guest Relationship

Did Covid-19 have an effect on the host-guest relationship?

- Bond between Host and Guests increased
- Guests keep greater distance to staff
- Guests keep greater distance to other guests
- Regular guests display greater level of trust towards host
- Guest demand greater attention from host

Source: Eurac, CAS

N=659
The relationship with my host did not change

Bond between Host and Guests increased

I am keeping a greater distance to my host

I value the heartedness of my host more than before

I value my host’s individual attention for me more than before

Did Covid-19 affect the relationship between you and your host?

Source: Eurac, CAS

N=874
Guest Behavior

Did Covid-19 influence the behavior of Guests?

Survey: Firms

Source: Eurac, CAS

N=659
Guest Behavior

Did Covid-19 change the frequency with which you carry out the following activities during your holidays?

- Hiking/ climbing
- Cycling/ mountain biking
- Buying local products
- Gastronomy
- Shopping
- Water sports
- Wellness
- Culture
- Sport events
- Religious activities
- Cultural events
- Entertainment

Source: Eurac, CAS
N=874
Conclusion

• Firms show high resilience
  • High adaptability and proactive behavior of firms
  • Firms quickly adjusted internal processes to new situation

• Guests changed behavior because of Covid-19
  • Switch from public transportation towards private cars and bicycles
  • Guests keep greater distance to other guests
  • More outdoor activities
  • Less Entertainment/cultural activities

• Host-Guest Relationship unaffected by Covid-19
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