

**eurac**  
research

CENTER FOR  
ADVANCED STUDIES

# EFFECTS OF COVID-19 ON TOURISM

Bozen, South Tyrol, Italy

October 21<sup>st</sup>, 2020

Center for Advanced Studies

Prof. Dr. Harald Pechlaner, Dr. Andreas Dibiasi





Hoteliers- und Gastwirteverband

# Survey among HGV members

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

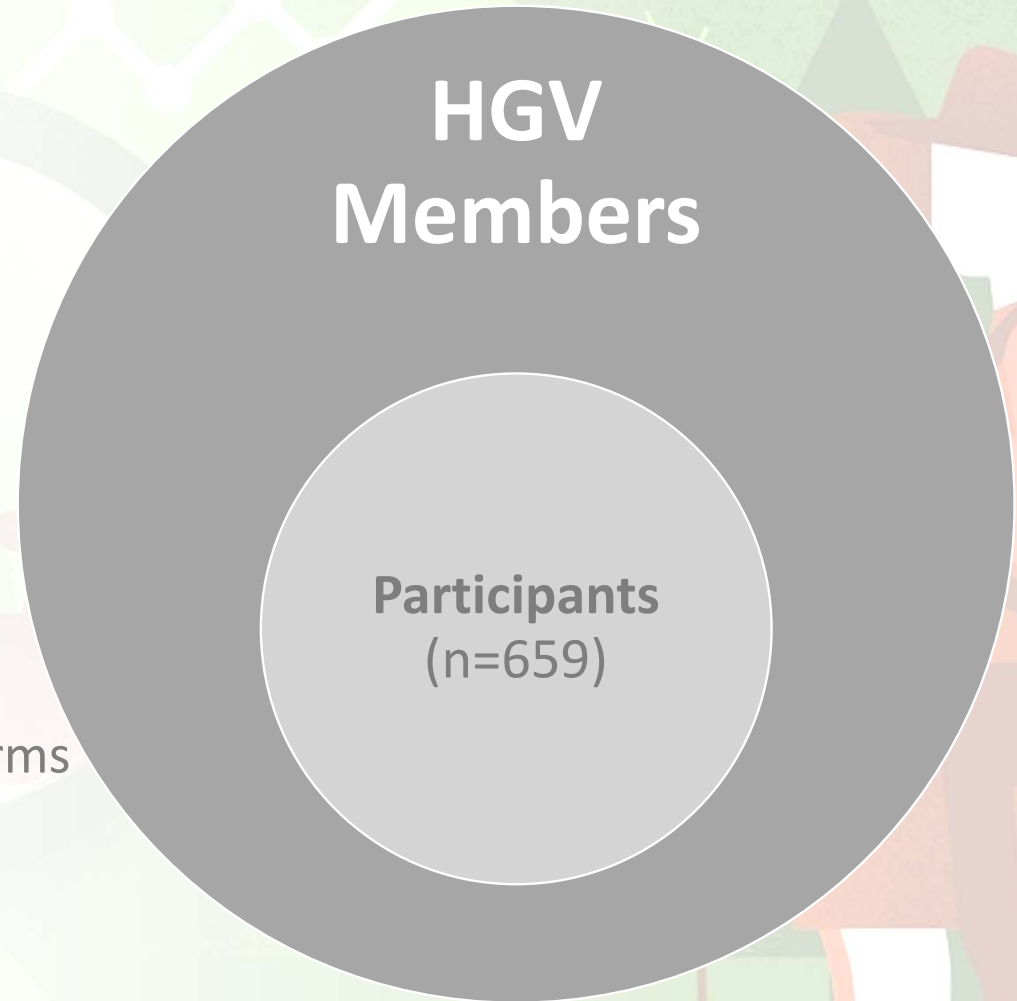
**Survey Period:** 3rd - 9th August 2020

**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

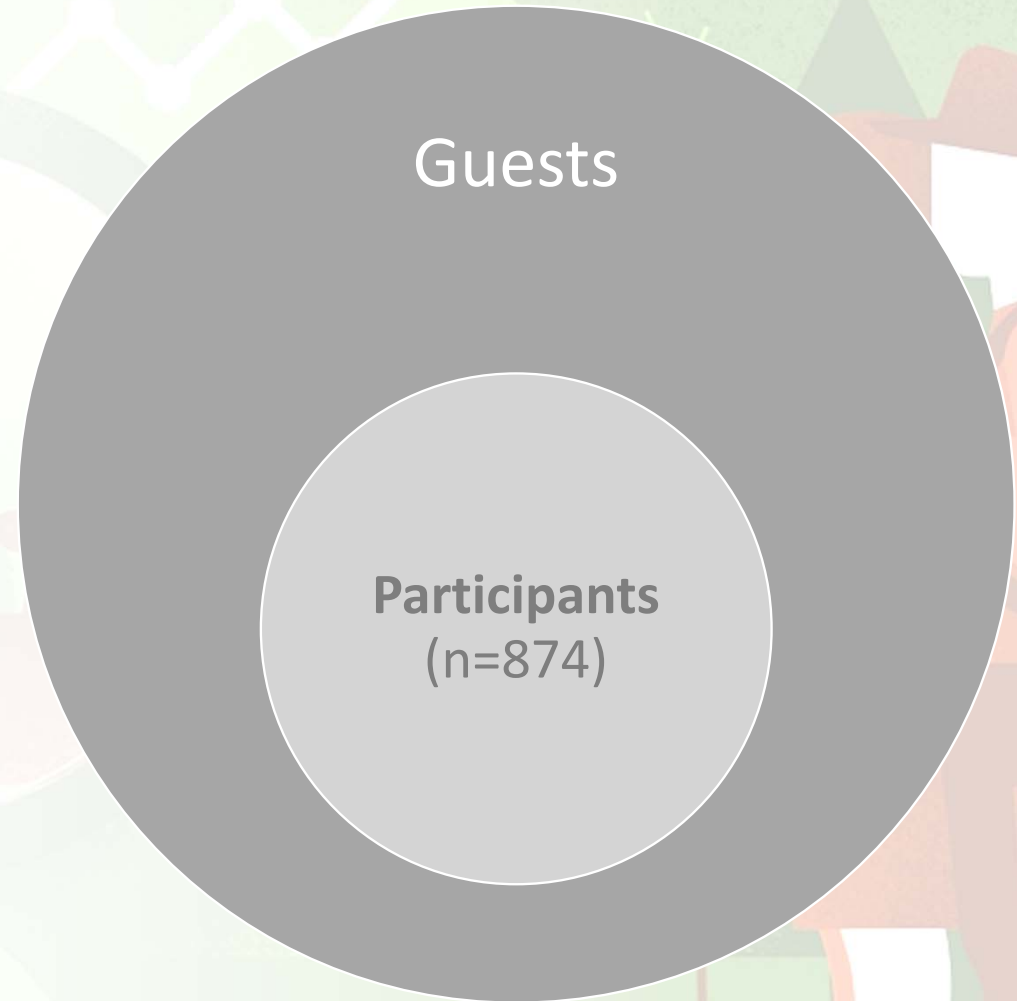
**Participants:** Guests (23 towns/villages)

**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



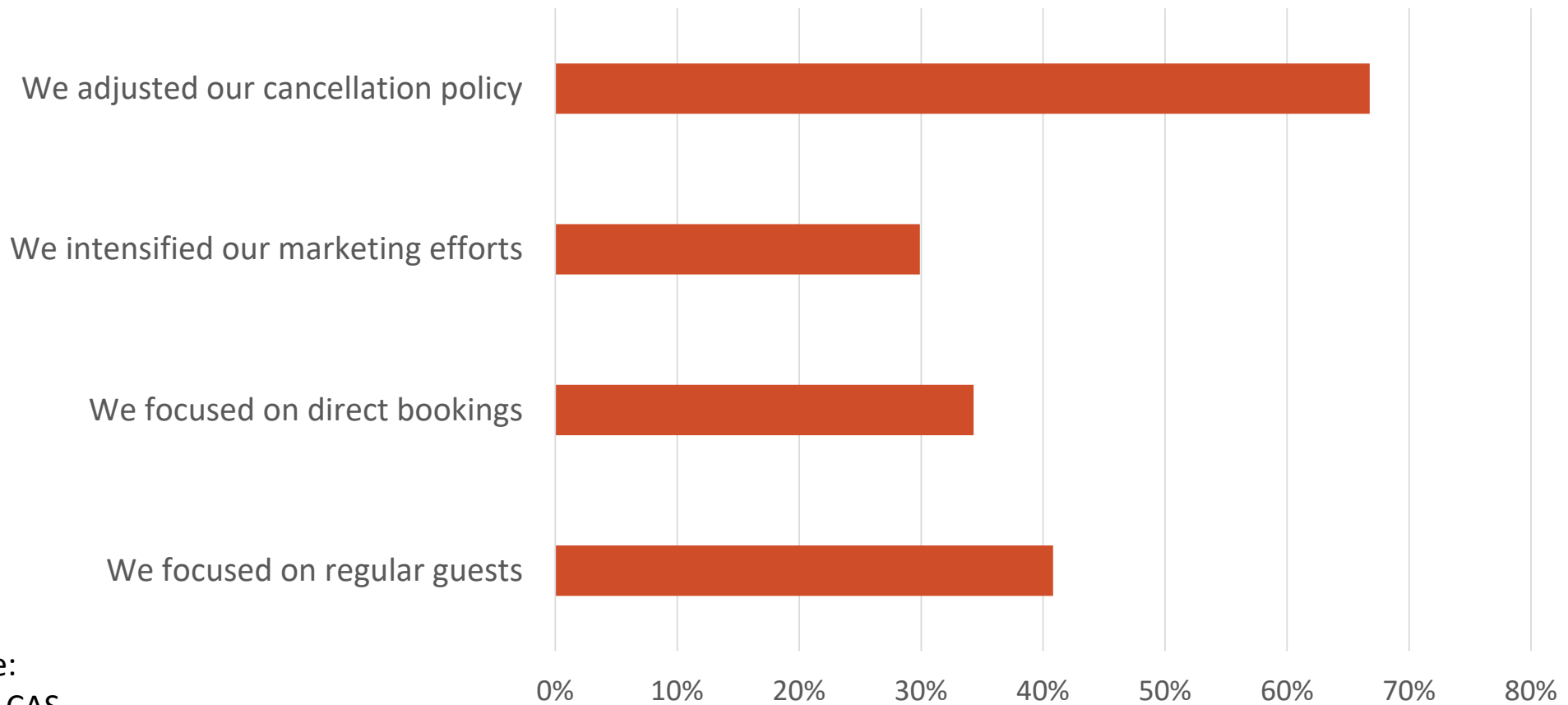


# How did Firms respond to Covid-19?

# Business Model

Survey: Firms

Did you change your business model?

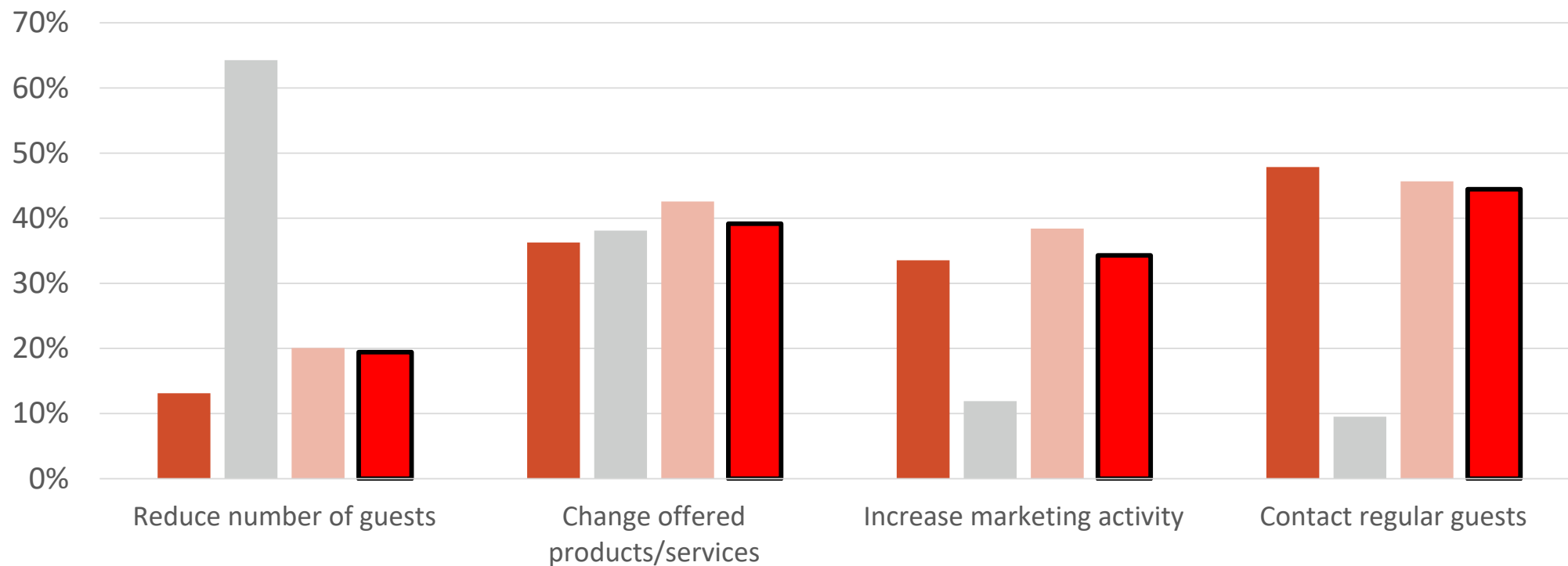


N=659

Source:  
Eurac, CAS

# Measures

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



Source:  
Eurac, CAS

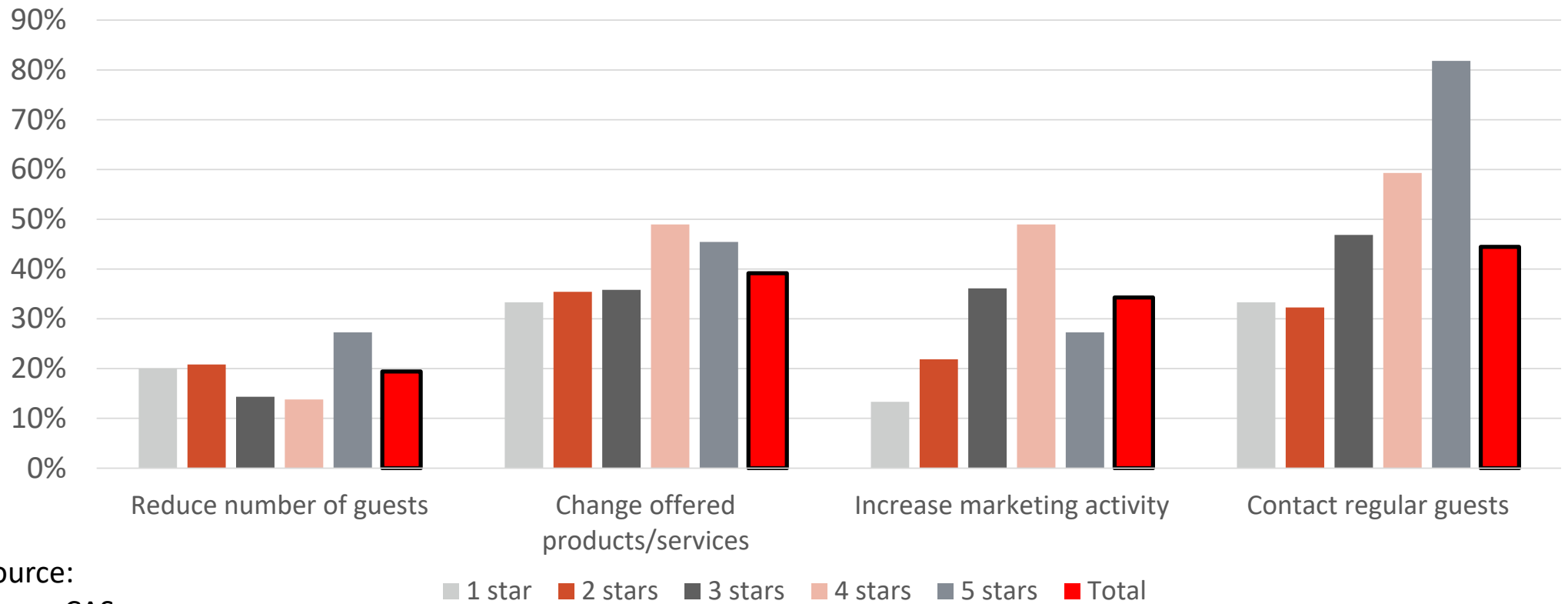
■ Hospitality   ■ Bar and Restaurants   ■ Bar/Restaurant and Hospitality   ■ Total

N=659

# Measures

Survey: Firms

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



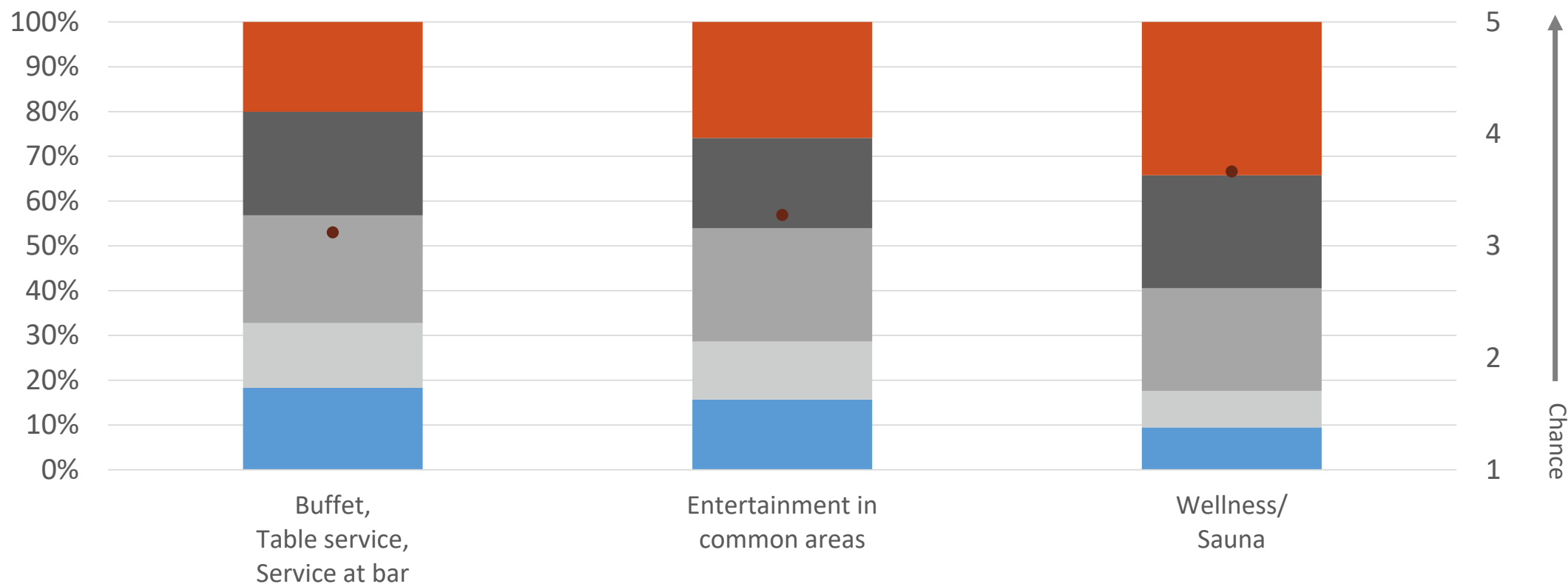
Source:  
Eurac, CAS

N=659

# Processes

Survey: Firms

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



Source: Eurac, CAS

■ Not at all  
 ■ Slightly changed  
 ■ Somewhat changed  
 ■ Strongly changed  
 ■ Completely changed  
 ● Average

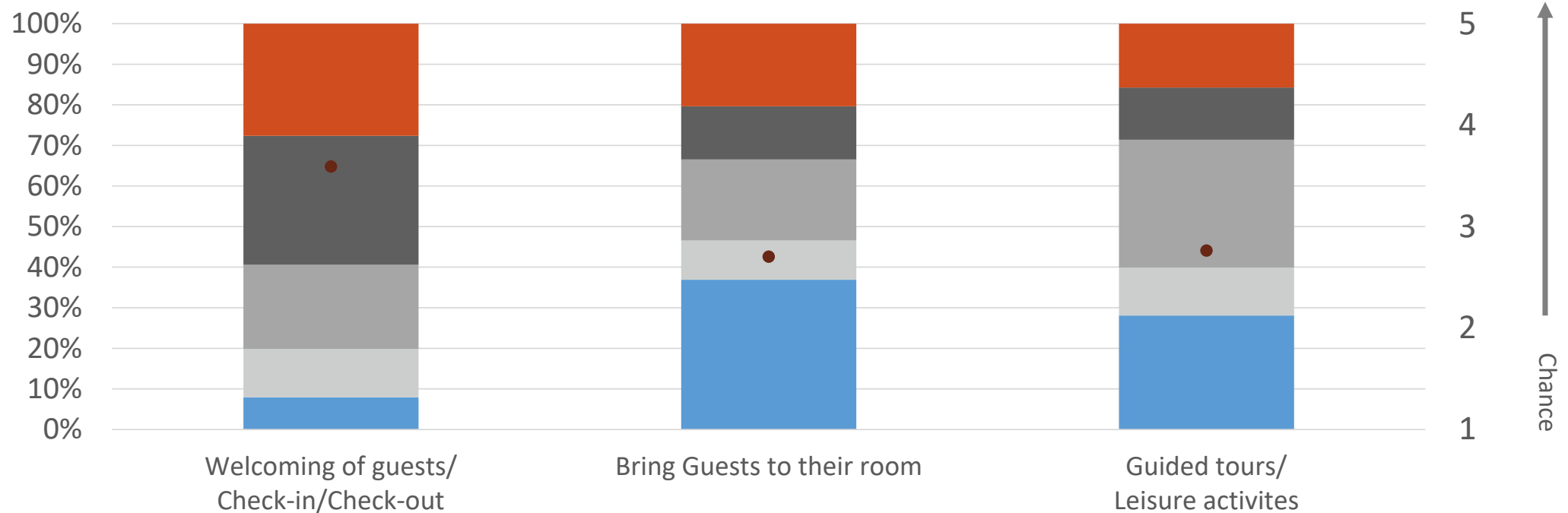
N=659



# Processes (cont'd)

Survey: Firms

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



Source: Eurac, CAS

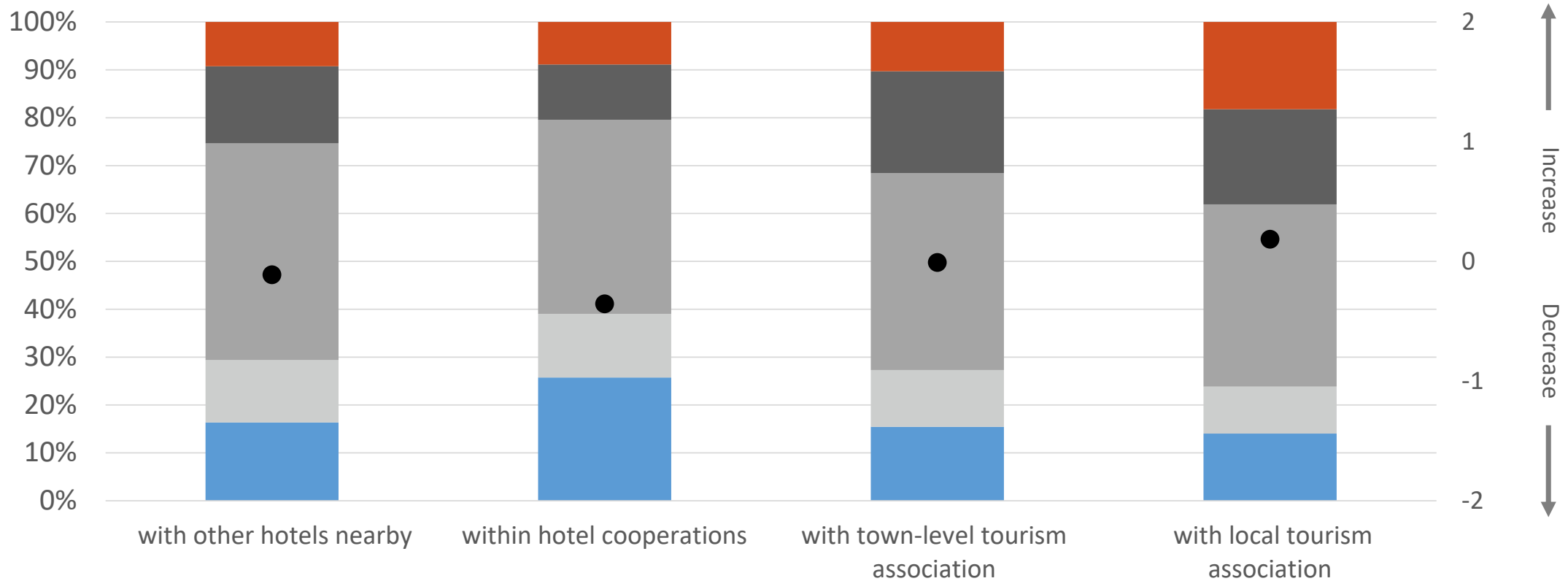
■ Not at all  
 ■ Slightly changed  
 ■ Somewhat changed  
 ■ Strongly changed  
 ■ Completely changed  
 ● Average

N=659

# Cooperation

Survey: Firms

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



Source: Eurac, CAS  
 ■ Strongly increased ■ Slightly increased ■ Remained unchanged ■ Slightly decreased ■ Strongly decreased ● Average

N=659

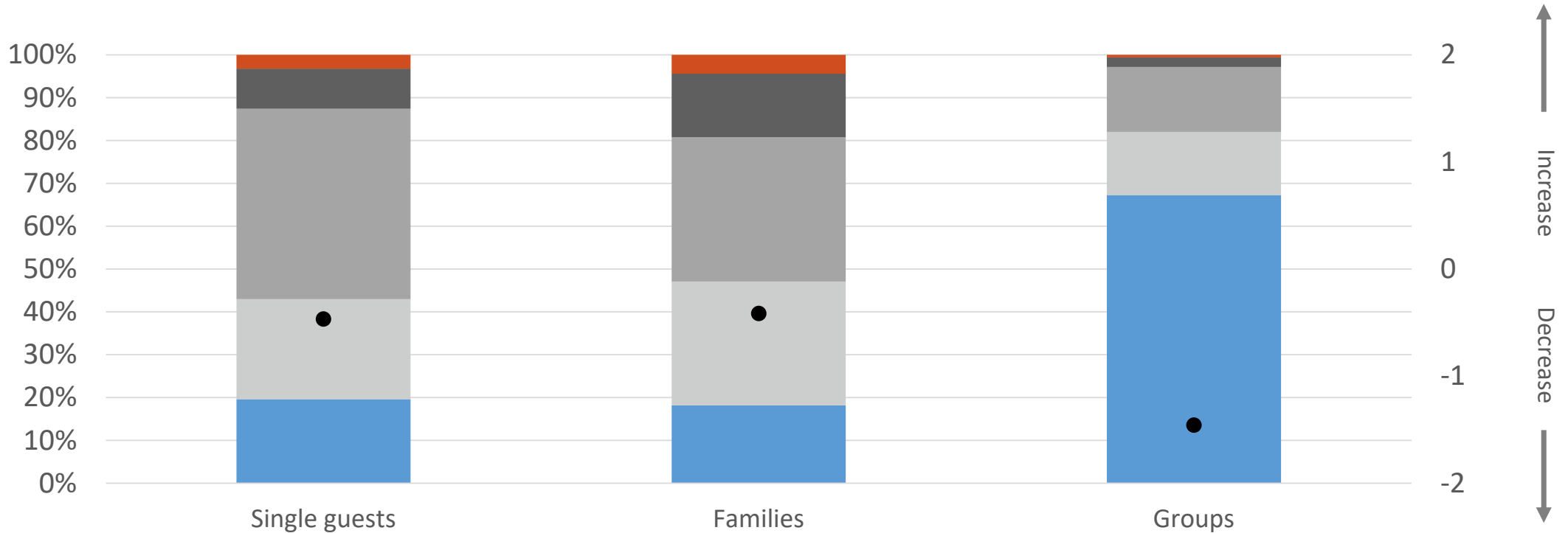


# Did guests change because of Covid-19?

# Type of Guests

Survey: Firms

## Change type of guests



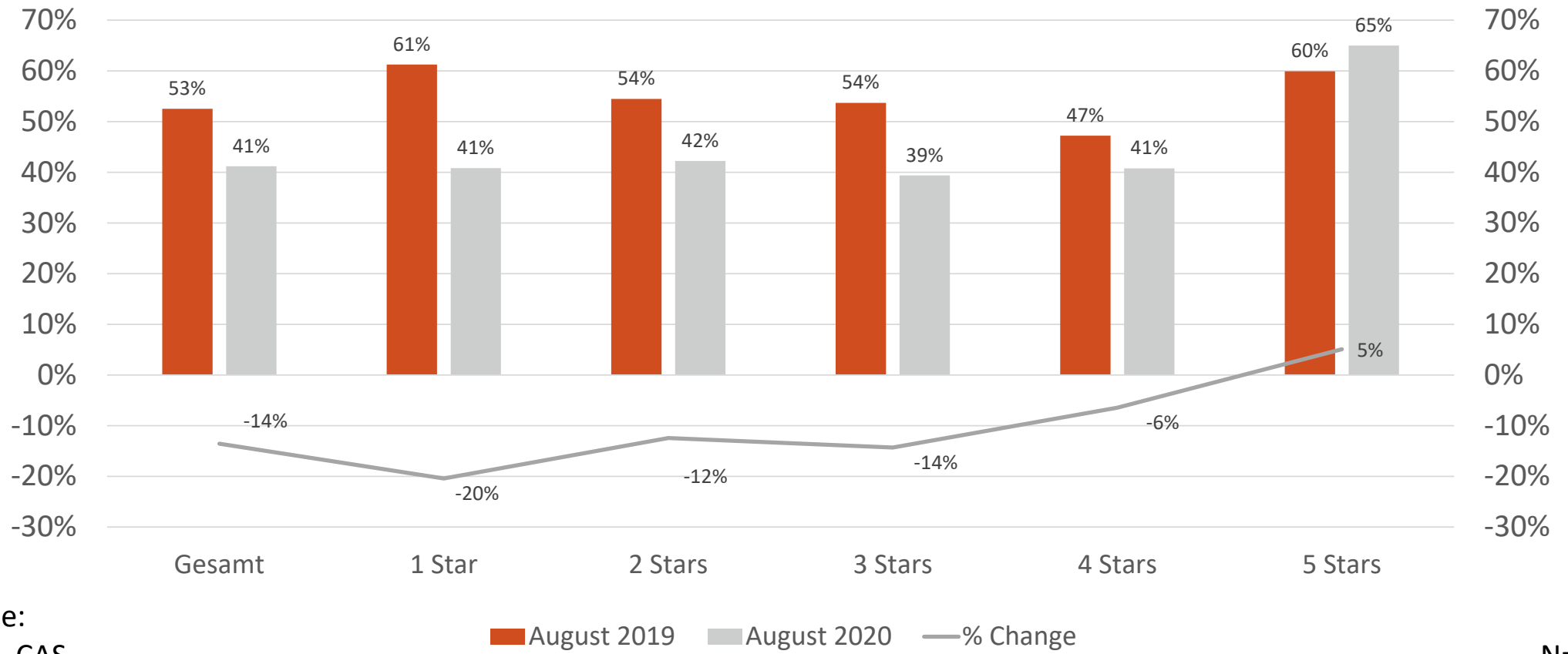
Strongly decreased Slightly decreased Remained unchanged Slightly increased Strongly increased ● Average

N=659

# Regular Guests

Survey: Firms

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



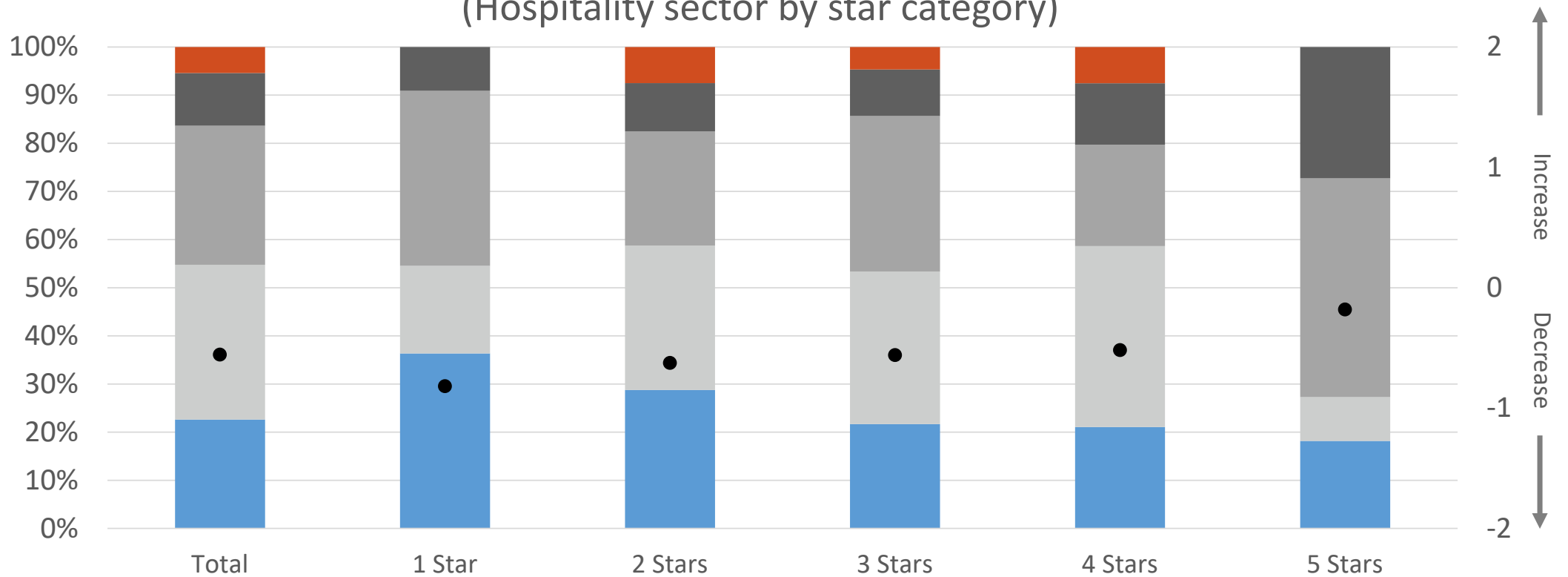
Source:  
Eurac, CAS

N=659

# Ease of Travel

Survey: Firms

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



Source: Eurac, CAS

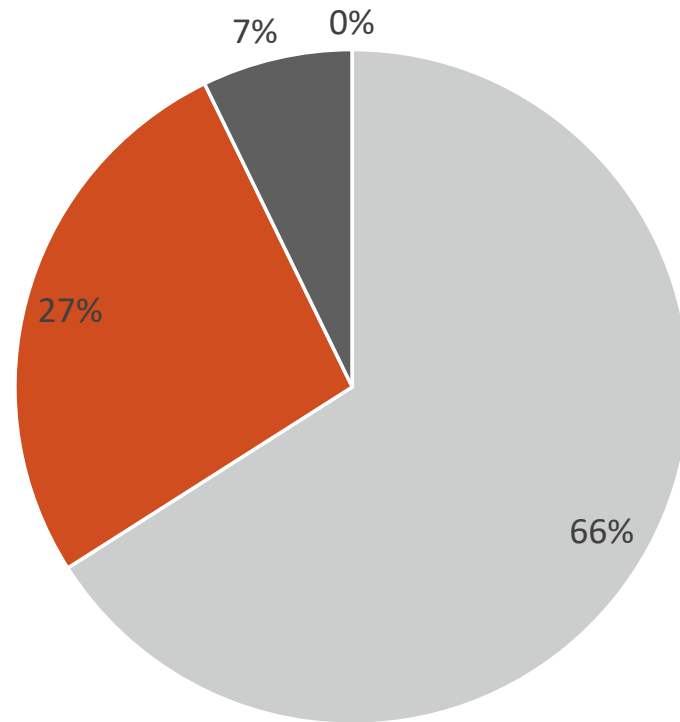
Legend: Strongly increased (blue), Slightly increased (light gray), Remained unchanged (medium gray), Slightly decreased (dark gray), Strongly decreased (orange), Average (black dot)

N=659

# Host-Guest Relationship

Survey: Guests

How important is a direct relationship to your host?



Source:  
Eurac, CAS

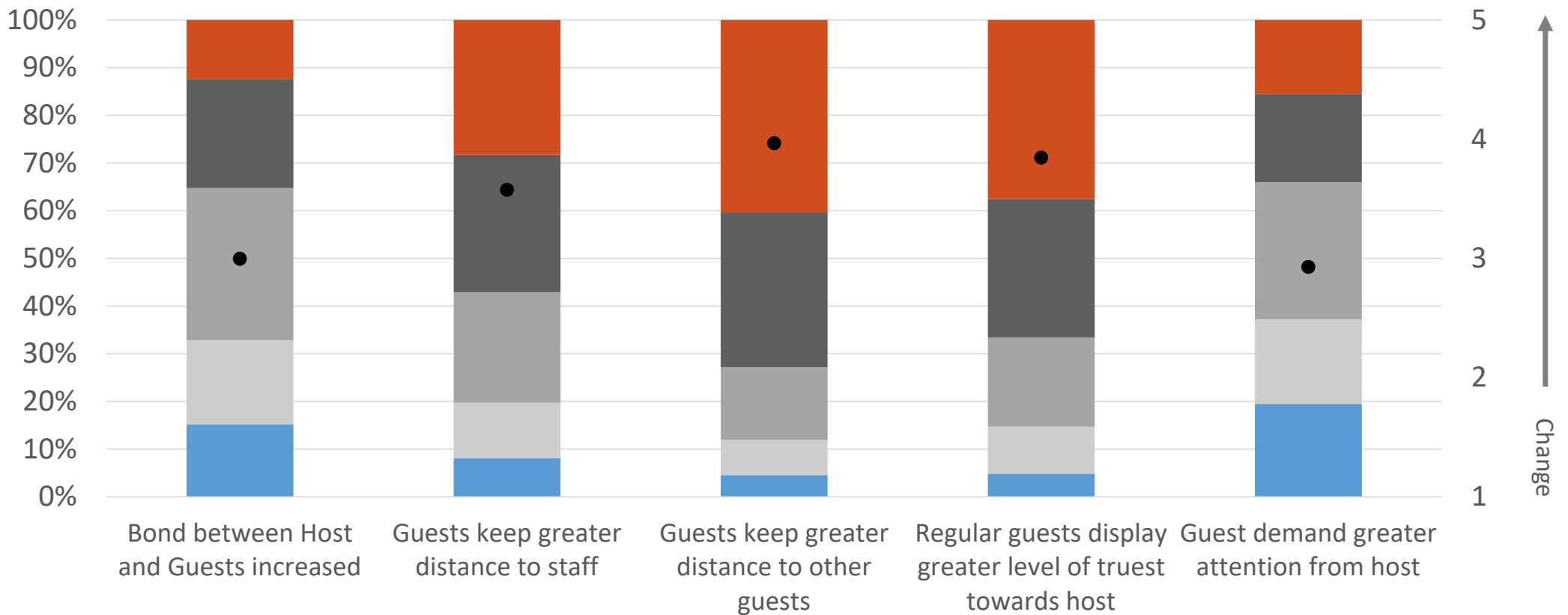
■ very important   ■ somewhat important   ■ not very important   ■ not important at all

N=874

# Host-Guest Relationship

Survey: Firms

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



Source: Eurac, CAS

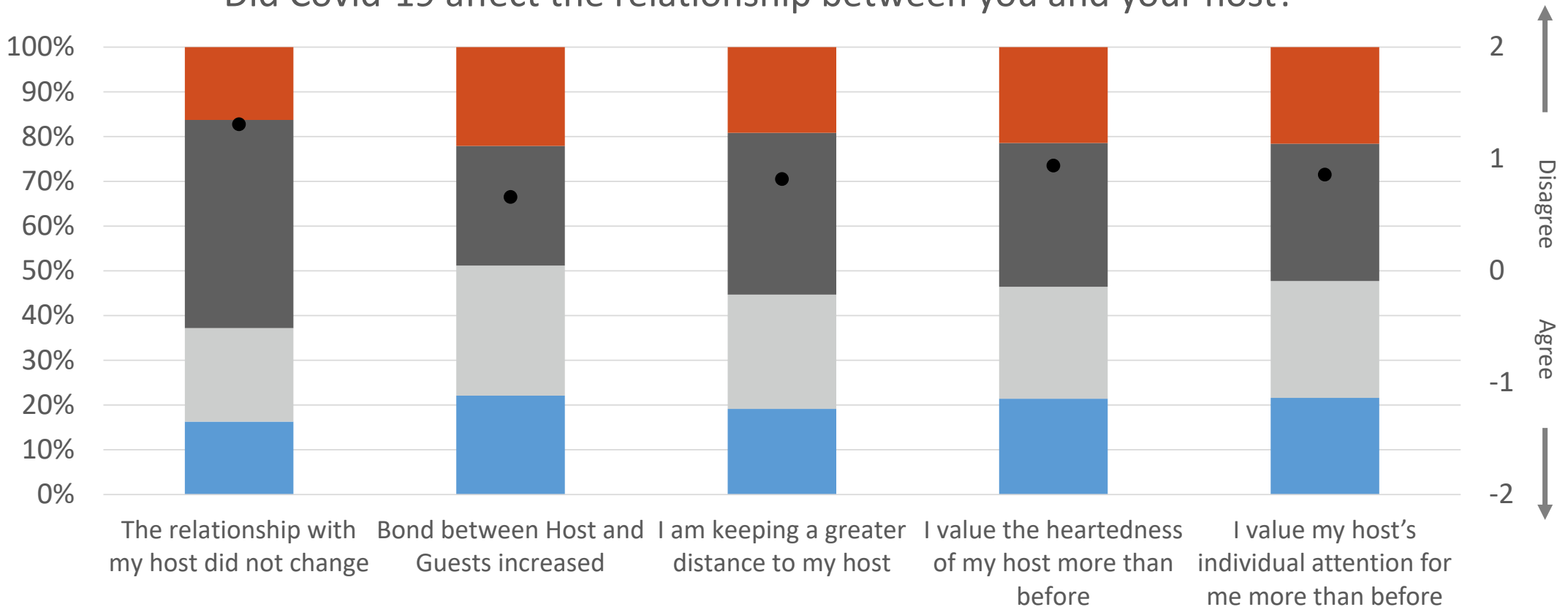
N=659



# Host-Guest Relationship

Survey: Guests

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



Source:  
Eurac, CAS

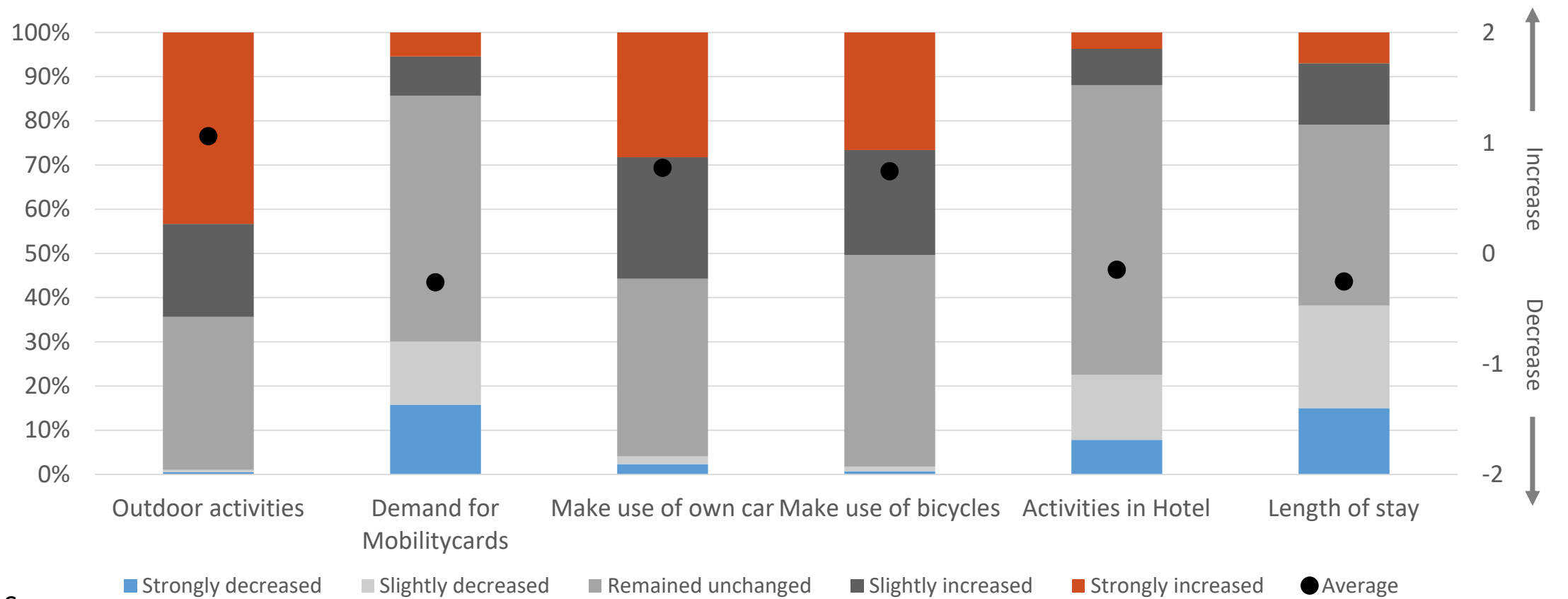
■ strongly disagree   ■ slightly disagree   ■ slightly agree   ■ strongly agree   ● Average

N=874

# Guest Behavior

Survey: Firms

Did Covid-19 influence the behavior of Guests?



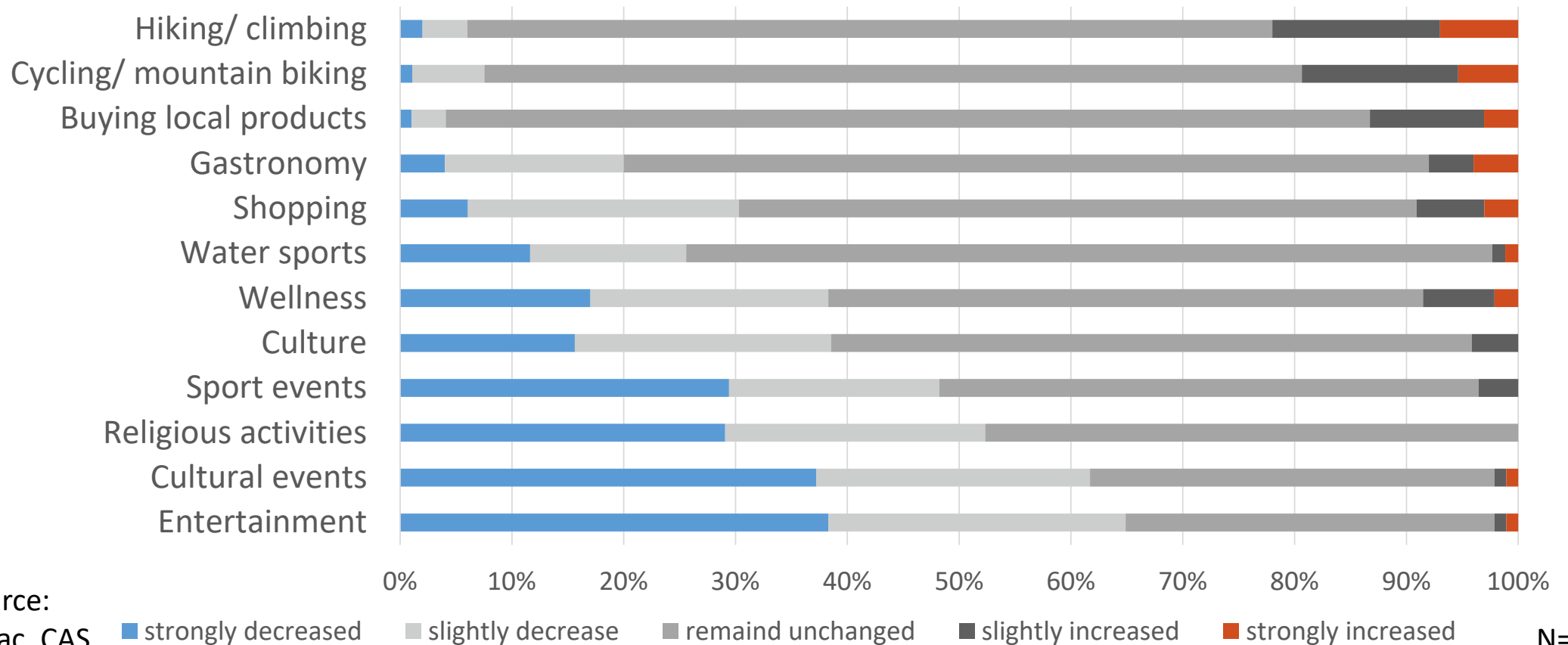
Source:  
Eurac, CAS

N=659

# Guest Behavior

Survey: Guests

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



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



# CONTACT US

## Center for Advanced Studies

Eurac Research

Drususallee/Viale Druso 1

39100 Bozen/Bolzano

[harald.pechlaner@eurac.edu](mailto:harald.pechlaner@eurac.edu)

[andreas.dibiasi@Eurac.edu](mailto:andreas.dibiasi@Eurac.edu)

**[www.eurac.edu](http://www.eurac.edu)**