

“Back to Normal” vs. “New Normal”: the Post-Pandemic Recovery of Italian Tourism

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Abstract

Based on one year of intensive interaction with and feedback from practitioners, this paper provides a twofold contribution of a conceptual nature. On the one hand, it attempts to clarify the nature of the crisis in comparison with the past experiences. On the other hand, with reference to the literature on dynamic capabilities, it outlines, in an ideal-typical way, two diverging and co-existing (and therefore conflicting) perspectives of the recovery process that are summarized in – respectively – the “back to normal” and the “new normal” discourses.

Keywords: Tourism; Post-Pandemic Recovery; Dynamic Capabilities; Global Markets

1. The Italian Tourism Relevance

The issue no. 2/2020 of the “Journal of Tourism Futures” opened with an editorial made of a white page and a simple sentence “COVID_19 means the future of tourism is a blank piece of paper”. This brilliantly summarized the attitude of tourism scholars with regard to the countless questions raised about the future of tourism, at least during the first months of the pandemic.

The situation has partially changed. An impressive quantity of new research is now arriving to journals’ editors and is likely to flood their desks in the next months. Yet, at the time of writing this paper, only a few contributions add to the understanding of the events and of the emerging issues something more than fragmented analyses of case studies and visionary contributions. Overall, published discussions about the impact of the pandemic on the tourism industry give evidence of the serious limitations of contemporary social sciences in dealing with such historic discontinuity and with the methodological challenges in understanding disruption in “a complex adaptive system with unpredictable behavior” such as tourism (Posma & Yeoman, 2021).

This paper draws on one year of intensive interactions with practitioners in Italy¹ that were looking for “scientific” contributions to their understanding of the situation and to whom we, as scholars, could only provide tentative tools for interpretation and partial, often unreliable evidence. Summing up the lessons from these extraordinary

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times, this paper provides a twofold contribution of a conceptual nature. On the one hand, it attempts to clarify the nature of the crisis in comparison with the past experiences. On the other hand, it outlines, in an ideal-typical way, two diverging and co-existing (and therefore conflicting) perspectives of the recovery process, based on a cognitive interpretation of the dynamic capabilities' paradigm.

In this respect, the Italian case has not only an objective relevance (according to UNWTO, 2020a, Italy was the 5th top destination by international arrivals and the 6th by international tourism receipts), but also shows some peculiar aspects that make it significant in comparative perspective. Italy, with an exceptional heritage of tourist attractions, had been able to benefit from the exceptional growth of international tourism de facto "hands down", i.e., without a national strategy. Italy did not even have a national ministry for tourism for many years and Rome had exercised only a vague coordination of promotional policies, indeed of very heterogeneous quality, in the hands of twenty-one regional governments. The "Strategic Plan 2017-2022" (MiBacT, 2016) had been an exercise of a distinctive quality, widely appreciated and yet lacking any consistent and committed implementation. Thus, Italian tourism entered the crisis with a high exposure to international flows, a weak, fragmented and scarcely innovative entrepreneurial structure and serious challenges deriving from an uncontrolled and often unsustainable development.

2. Why is This Crisis Different?

2.1 Global and Synchronous

Tourism had represented one of the most spectacular cases of growth of an economic sector in recent decades and the prospects for further growth seemed indisputable. It is enough to remember that the most dynamic player in the international market, China, had still only very partially expressed its potential. According to C-Trip analysts, less than 9% of Chinese had a passport in 2018 and, at that time, this figure was expected to double by the end of 2020.

Nonetheless tourism had known the harsh reality of crises. On a global scale growth had been interrupted three times: in 2001 as a consequence of the attack to the Twin Towers; in 2003 due to SARS and the war in Iraq; and in 2009 because of the financial crisis. In all those cases, economic crises or exogenous threats had weakened spending power and curbed travel motivation. But crisis hit tourism many more times on a local scale. In recent years, the impact of terrorist attacks, events linked to political instability and wars, outbreaks of crime, natural and industrial disasters have concerned many areas of the world (Rosselló et al., 2020). Although we tend to perceive them as exceptional, they are not: every year we deal with new conflicts, dozens of technological disasters and hundreds of natural catastrophes (Mugnano & Carnelli, 2017).

Crises had given evidence of the peculiar vulnerability of tourism industry (Ritchie & Jiang, 2019). Tourists are likely to be especially exposed to the dangers associated with those events because of their "fragility" that derives from their lack of familiarity with the local context, their relaxed attitudes, the possible inability to speak the local language etc. All these factors make them, e.g., more exposed to crime or more difficult to help in the case of a natural disaster. In the case of terrorism, they

may even be the explicit target of actions both because of their exposure and because of the political and economic implications of hitting the tourist economy (Korstanje, 2017; Adeloye & Brown, 2017; Coca-Stefaniak & Morrison, 2018). Furthermore, facing a threat to their safety, the travelers' buying decisions are unlikely to be influenced by price considerations and will tend, in a binary way, to simply reject the choice of the concerned destination. The impact on the destination will be radical and immediate.

While the perception of the complexity of tourism vulnerability and resilience was present, at least in the scientific literature (Hall et al., 2018), the risks involved were perceived as almost nullified by the supposedly built-in tendency of the system to recover rapidly, rejoining the long-term growth trend. In part this was the result of the local nature of most crises. The "local vulnerability" of places may vary as a result of the basic conditions, such social and economic conditions, quality of social organizations and governance (Mugnano & Carnelli, 2017), but at the macro level local crises divert tourist flows towards destinations perceived as safe, so that the overall industry does not necessarily suffer.

Even in the crises of a more global nature the impact was limited. Resilience appeared to be an inherent character of tourism because the recovery had always been remarkably swift. Looking back at the three major global crises in international tourism, we see that it took only 5 months for return to growth in the case of the crisis following the September 11 attacks and in the SARS crisis and 10 months in the case of the 2009 economic crisis. The return to previous volumes was realized respectively after 14, 11 and 19 months (UNWTO, 2020b). This has justified a substantial optimism: "tourism has demonstrated significant resilience in the face of a variety of challenges", therefore contributing to the "resilience of the economies" (OECD, 2018).

In the case of the pandemic, the global nature has been undisputed, and the diffusion was extremely rapid, notwithstanding several countries went through a time of denial. In Italy, just a few days before the decision of establishing a national lockdown, local authorities and tourism companies were still asking to reject the "psychosis" of the Chinese virus. But the call to "not stop" (as in the viral videoclip "*Milano non si ferma*") was short-lived. Never had we witnessed a total halt of tourism mobility and activities on a global scale and that occurred in an essentially synchronous way, therefore preventing (unlike in the past) any significant redirection of flows.

2.2 Unexpected, Unprepared

Vulnerability is not a new concept in economics. In the literature it indicates the inherent exposure of an economic system to external shocks and therefore it signifies the risk of being adversely affected (physically, socially and economically) by hazardous events. Vulnerability can however be mitigated (and the associated risk can be diminished) by the system's coping ability that in turn results from policies aimed at making the system able to resist and react to the event, i.e. at making it resilient (Briguglio et al., 2009; Proag, 2014). Resilience is made possible by all those actions that increase the adaptive capacity of the system, but it is essential that the system's vulnerabilities are correctly assessed and fully acknowledged (McManus et al., 2007). Along similar lines, the literature had also provided robust insights into

the specific aspects of vulnerability and crisis management concerning tourism (Faulkner, 2001; Ritchie, 2008; Ritchie & Campiranon, 2015).

In management literature a popular metaphor refers to exogenous threats as “black swans” and “gray rhinos”. “Black swan” is an impactful event that escapes regular expectations, based on past experiences that prove it impossible (Taleb, 2007). A “gray rhino” is a highly probable and high-impact threats that occur after warnings are made and yet neglected (Wucker, 2016). With hindsight we must acknowledge that the pandemic threat was of the latter type, as the risk had been widely and specifically discussed in academia and in the policy-making institutions of many countries. It was also popularized not only in science fiction, but also by high-profile opinion leaders (most notably in a now famous TED talk speech by Bill Gates). But insufficient attention was paid to operationalizing preparedness. In Italy too, the pandemic plan was a document “copied and pasted” from older versions without any serious attempt to figure out its possible implementation.

The general unpreparedness of the country summed up to the specific reluctance of the tourism institutions to approach the issues of crisis management, also because of the weakness or mere non-existence of territorial organizations of destination management. In Italy experiences were limited to the very localized impact of national disasters and attention was given – ex post, if any – exclusively to communication issues.

2.3 Uncertain

Crisis management had to deal with a situation of extreme uncertainty. There was no precedent in recent history to be used as reference and certainly not in the recent history of a globalized tourist economy. Adding to that, the lack of reliable scientific knowledge about the epidemic itself produced a confused and difficult learning process on how to regulate human activities if not by the simplest and most radical solution: the “lockdown”. Different national approaches and diversified regional and local situations produced a jungle of rules that hindered severely mobility and tourist activities.

Uncertainty also concerned the timing of the pandemic. Contrary to the past, no reasonable expectation could be developed about the end of the emergency also because of the sequence of delusions about the recovery caused by the succession of epidemic “waves”.

2.4 Radical, Existential

In Italy the optimistic view of tourism as a major contributor to national GDP was dismissed. Tourism became increasingly linked to an image of economic and social distress. The very survival of large numbers of Italian companies has been at stake and social implications have been extremely severe, also due to the systematic resort to unstable and often irregular employment.

Unlike in past crises, it was the growth- and international-oriented model of global tourism development that was challenged. Tourism-led growth approaches had been increasingly proposed in either less developed or de-industrialized areas of the world, including the Italian *Mezzogiorno*. Besides its limited credibility, the hypothesis of

replacing international tourism with domestic tourism questioned the emphasis on international tourism as the foundation of those approaches.

The challenge has been even deeper. In the shift from a local epidemic to global pandemic, tourism was as much a victim as a major accomplice. While past crises could be attributed to exogenous events (from terrorism to natural catastrophes), tourism has been both a cause and an effect of the acceleration of mobility that contributed to the diffusion of the virus and made the difference with the previous cases of epidemic. In fact, until vaccination campaigns took off, restrictions to travel and social distancing had been the only possible response to the diffusion of the virus (Gössling et al., 2021).

However, starting from “ground zero” (Buhalis, 2020), it was also possible to suggest a perspective of renewal, a “transformational opportunity” (Sigala, 2020). In other words, Considering “how the pandemic events of 2020 are contributing to a possibly substantial, meaningful and positive transformation of the planet in general, and tourism specifically” (Lew et al., 2020), could lead to a “tourism re-imagined and re-enabled” (Haywood, 2020).

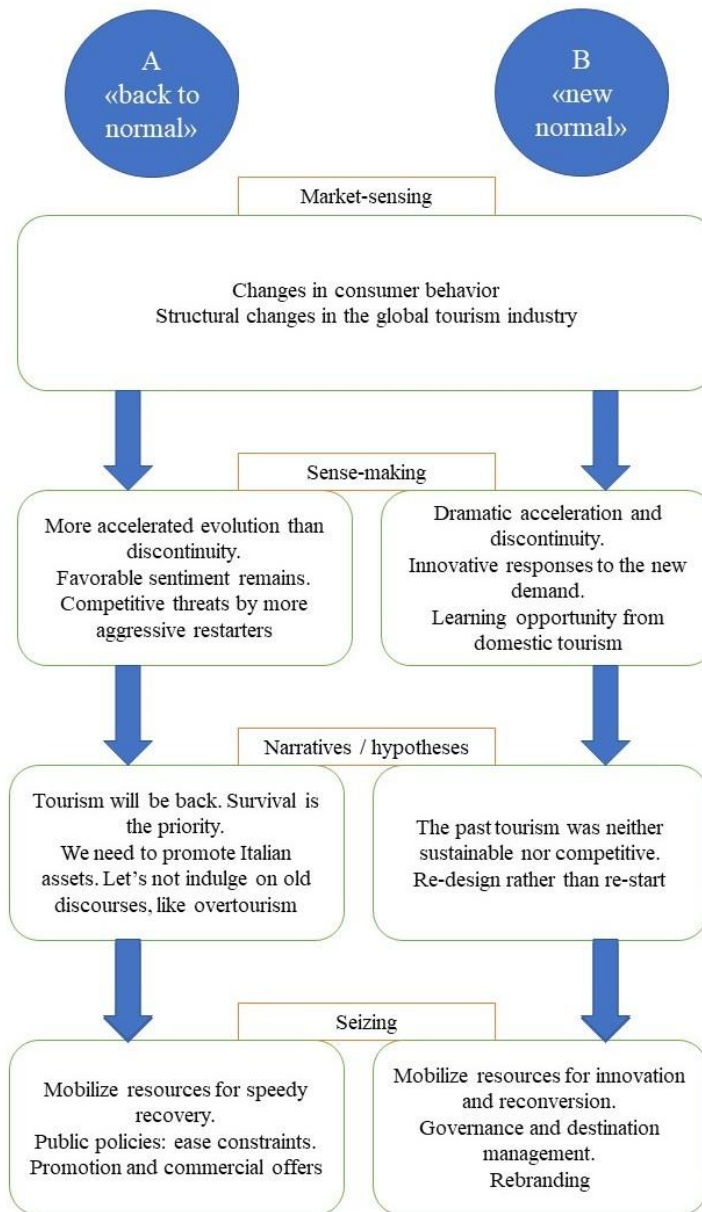
3. Dynamic Capabilities in Tourism Recovery

Tourism resilience takes place and needs to be analyzed at different but interacting levels: macro (tourism systems, destinations and dependent communities), meso (organizations, networks and value chains) and micro (companies, employees, tourists, residents) (Prayag, 2020). The Covid-19 pandemic has proven to be an extreme stress test of the dynamic capabilities of tourism at all those levels, because of the high level of unpredictability in the evolution of the markets.

The dynamic capabilities literature emphasizes the firm’s ability to “integrate, build, and reconfigure internal and external competencies to address rapidly changing environments’ (Teece et al., 1997) through a process of sensing opportunities and threats in the customers’ predicament, seizing and transforming (Teece, 2018). Baden-Fuller and Teece (2020) reminded us of the “cognitive and perhaps even emotional dimensions” of dynamic capabilities. This is realized through the sense making of market changes and the design of a narrative that includes hypotheses about a likely and/or preferable future outcome, that in the end is decisive for the final decision and the mobilization of the resources required to implement consistent actions.

Thus, following the conceptual framework suggested by Baden-Fuller and Teece (2020), by reconstructing the discourses on tourism recovery as recollected during the March 2020 – March 2021 period, we identify two ideal-typical paths, that are summarized in the figure 1. Of course, reality is more likely to present a mix of the patterns sketched in the two types and often individual actors mix arguments of the two discourses. Still, as we will try to show, they are functional to sketch and better understand the present phase and may help in interpreting the different (and possibly conflictual) positions within organizations, e.g., stakeholders within a destination, or between different typologies of destinations.

Figure 1: *Discourses on Tourism Recovery*



Source: derived from Baden-Fuller & Teece, 2020.

3.1 Market Sensing

Both paths are triggered by the identification of the threats and opportunities linked to the recovery phase. These seem essentially related to a change in the consumers' behavior but are not radically new trends. In 2019 "conscious, responsible, eco-friendly" had already become the new catchwords to identify emerging travel trends. It was a perception shared by many: tourists were showing increasing attention to the impact of their travel, they were also favoring sustainability-based tourism offerings in their choices and showed a clear preference for "slower" vacation modes. This had led to the emergence of important market niches, attracted by travel experiences more

consistent with their needs for physical and psychological well-being or, as they have been defined, “transformative” (Pung et al., 2020).

Since the very first studies on post-Covid travel intentions there has been a consensus on the new priorities in the tourist’s decision making as being characterized by the downsizing of urban tourism (as a consequence of the urban lockdown experience, but also for the widespread belief of the possible relationship between pandemic and pollution and for the distrust of overcrowded contexts) and by a renewed attention to nature. It is also expected an almost obsessive attention to health (as the virus proved lethal especially for people in more fragile physical conditions due to age and previous diseases). Some of the new motivations behind travel decisions are not going to be short-lived, e.g., the urge to escape from the condition of high stress linked to anxiety and fear of contagion, to new models of social life (distancing, masks, etc.), and to different and not necessarily relaxing working conditions (smart working, remote working, etc.) (Globetrender, 2020).

As for the important business tourism market, the threat posed by videoconferencing technologies has long been known, but it had been difficult to replace deep-rooted practices and working styles. From now on, however, the experience of the past months and the new familiarity with VC platforms will weigh in, inducing much greater selectivity in travel decisions at the individual and corporate level.

All of this takes place on the background of the structural changes that were already happening in global tourism, namely, on the one hand, the process of integration and concentration of market power and, on the other hand, the possible evolution from the present duopoly in online intermediation (Booking, Expedia) to a more diversified scenario (including Google, Airbnb, Trip, Amazon and possibly a new role for regional platforms). Overall, these trends seem to be unaffected (and for some experts could even be strengthened or accelerated) by the conditions of the recovery phase that, in fact, could confirm the motivations underlying them.

3.2 Sense-Making A

Many practitioners feel that there is some overstatement in identifying the post pandemic scenario as a radically “new normal” and warn about the risk of projecting into the future a generic wishful thinking. They see less a discontinuity than an accelerated evolution, e.g., in the use of digital technologies or in consumers’ preferences.

On the one hand, they feel much comforted by the surveys that, mainly based on web searches, confirm the “sentiment” in favor of Italy as a preferred, dream destination for holidays. On the other hand, they are aware that competition will be harsh, as during the recovery phase, more dynamic and aggressive competitors may be capable to subtract market shares to Italian destinations, especially with regard to international flows.

3.3 Sense-Making B

While market changes are certainly reflecting trends that have characterized tourism for years, the acceleration induced by the pandemic is dramatic and is right to think about the future in terms of a “new normality”. The market will be characterized by a different tourist demand that will look for wellbeing, wilderness

and nature, isolation, sustainability and new experiences. The temporary substitution of foreign inward flows with domestic tourism should provide a learning opportunity to make tourist products evolve.

The ability to innovate and respond to this new demand will be the decisive factor in determining a new geography of flows within and between countries, with the possible emergence of alternative destinations.

3.4 Narratives A

“We will see the light at the end of the tunnel”: tourism – as an essential feature of contemporary society and economy in a globalized world, will be back. For the Italian tourist industry, it is essential to focus on survival. In other words, one must be prudent in pursuing radical innovations in an uncertain scenario and with limited financial resources available. We must focus on sustaining and promoting aggressively Italian assets, whose attractiveness for international and domestic tourists remains unparalleled. We risk of losing to competitors, if we do not move as fast as the others.

It is no time to indulge on old discourses, like the ones on “overtourism” and the related policies to regulate or limit flows. Overtourism is a problem of the past, now we deal with *under*-tourism, and we need rapid growth.

3.5 Narratives B

Pre-Covid Italian tourism was based to a large extent on models of tourism development that were already unsustainable, in the broadest sense of the term, with serious problems of both environmental sustainability and overtourism. Venice had become the global benchmark of an extreme degeneration of the tourism phenomenon. There was a serious challenge in this situation, because tourists were increasingly returning from some travel experiences with feelings of disappointment, disturbed by congestion, as well as by the commodification and loss of identity of places. Prestigious international media had even invited “to forget” iconic destinations like Tuscany (Ogden, 2019).

Therefore, it is not just a matter of restarting demand, but to re-design tourism in a more sustainable and competitive way. This implies avoiding the rapid reappearance of overtourism and creatively proposing new paths and destinations locally and regionally. In this respect, this dramatic crisis is also a window of opportunity for change: “if not today, when?”

3.6 Seizing A

Companies and destinations must mobilize resources for a speedy recovery. This is heavily dependent on the actions of public policies. On the supply side, it is important to support the companies’ ability both to cope with operating and management costs and to restart activities in ways that, while compliant with health regulations, do not create any further constraints, e.g., to the occupation of new spaces.

It is also important that demand is supported in terms of promotion and commercial offers (following the example set, among others, by Regions like Lazio, Piemonte and Sicily and cities, like Genoa).

3.7 Seizing B

Resources must be mobilized to support innovation and send a clear message to the customers of a renewed and sincere attention to quality. Governance is needed and destinations need to be “managed”, not just “promoted”, in a logic of collective action, through active networking of local stakeholders (d’Angella & De Carlo, 2017).

Also policy interventions should be concentrated, rather than on occasional support for domestic demand, on investments consistent with a logic of innovation and reconversion of the national tourism system, including the “scrapping” of old structures (an issue that is relevant in several Italian destinations). This reconversion necessarily also implies a net downsizing of tourist flows towards congested areas, reducing the quantity and increasing the quality of the tourist offer and the related market targets. In the words of a Venetian, “the type of people you attract to Venice depends on what you offer” (Horowitz, 2020).

Concerning communication, rebranding is an option to be pursued, e.g., in cities where a new emphasis on sustainability is possible “not only through narratives that lead the tourist to follow alternative paths within the urban fabric but also by creating the necessary material and immaterial connections between the center and the peripheries” (Pasquinelli et al., 2021).

4. Conclusions

The pandemic crisis has opened “transformative possibilities” in tourism, but the outcome of these processes is still undefined (Hall et al., 2020). Facing the dramatic novelty of the pandemic crisis, Italian tourism is restarting in summer 2021 with great hopes, an undisclosed fear of possible new waves and unresolved issues that may lead to a potential for conflict between social groups and stakeholders (Jiang & Ritchie, 2017).

The ideal typical paths presented in this paper may help in identifying these contrasting attitudes. To the extent that tourism management and policy will be unable to balance between the arguments of competitive recovery and sustainable renovation, these paths may outline a possible conflict in the tourism of the future. On the one hand, stakeholders vigorously urging for the fastest possible restart are especially strong at this time and this may lead to subordinating reform to recovery, even to the extent of disregarding overtourism as a “problem of the past” and obtaining a relaxation from sustainability concerns.

On the other hand, the consensus on the new tourist demand (with the expected emphasis on nature, isolation and physical wellbeing) bring new support to sustainable tourism strategies (Battaglia, 2017) by politically legitimizing sustainability-oriented constituencies within the local communities. This legitimization may be further strengthened by the opportunity given to marginal areas (e.g., the inner areas of the country) to participate to a new and more sustainable tourism development as well as by a greater profitability of green entrepreneurial projects compared to more traditional ones.

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Notes

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