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The "low tide" of tourist flows in the COVID-19 era. Insights into the economic and social shades of the ongoing phenomenon

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Abstract

The COVID-19 pandemic is an unprecedented global crisis. Many countries have implemented restrictions on population movement, instituting full or partial lockdowns in Spring 2020 as nowadays. The Coronavirus emergency has imposed the need to introduce restrictions that have also had a great impact on tourism. The interventions of the European Commission and the containment policies of the population adopted by different member States, as well as by those outside Europe, have resulted in the closure and crisis of the tourism sector in most of the destinations. What it can be observed it's a sort of "low tide" of the tourist flows all around the world. Moving from these considerations, the paper aims at contributes to the debate on the binomial COVID-19 and tourism. After an introductory frame of the pandemic ongoing phenomenon, the paper focuses on the dynamics relating to the crucial sectors of air and cruise tourism, moving then to the analysis of the coastal and inland areas' situation. The proposed analysis is developed through the consideration of three elements characterizing the current scenario: the relevance of the pandemic shock wave; the adaptability of companies and operators' behaviour to changes and challenges; the unexpected and countertrend situation of arising positive externalities in some areas, such as the internal ones.

Keywords: COVID-19, Crisis, Impacts, Resilience, Tourism

1. Introduction

Like a real low tide, the wave of tourism in a few months of the epidemic COVID-19 phenomenon has withdrawn quickly and severely with consequences of the most disparate forms ranging, obviously from the economic, to the urban, social and even psychological aspects linked to the sphere of the individual. In different ways, but united by the effects of an unexpected collapse for an ever-growing sector, this wave has hit regions and tourism activities at regional, national and global levels. It is undoubtedly a multidisciplinary phenomenon that therefore requires the adoption of a holistic approach through which to interpret data, analyse dynamics and make predictions with scenario hypothe-

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ses. Animated by a geographical perspective of framing the theme, this contribution aims to place itself according to this orientation. In this context, in fact, the research tackles the phenomenon in general terms, both by highlighting paradigms of the current period, and by underlining externalities of double value which, as in every natural and economic crisis, can take shape. In particular, after having provided some elements constituting the distinctive facts and figures of the current epidemic phenomenon from a tourism point of view, the paper aims at give an insight and a possible explanation of the scenarios related to specific tourist sectors and areas. Since the beginning of March 2020, the epicenter of the novel coronavirus pandemic has moved from China and East Asia to Italy. As stated by Murgante et al. (2020), geographical similarities emerge among the areas hit, and particularly the Po Valley region and Wuhan metropolitan region in Hubei province. The analyses allow to highlight a sort of physiological "sieve function" which is part of the effects of the spread of the virus, in terms of different resilience between the strongest tourist contexts and destinations and compared to those who were in less attractive situations already in pre-COVID era.

After presenting the general framework related to the COVID-19 pandemic and its impacts on the tourism field, the paper presents the results of a detailed study aimed, firstly, at investigating the situation that connotes two crucial tourist sectors now facing the effects of the Coronavirus outbreak, namely air and cruise tourism. Then, the contribute addresses some positive evidence that can be observed in the ongoing pandemic situation, related to the resilience of coastal areas and inland areas. Some concluding reflections close the work.

The adopted methodological approach is based on the purpose of highlighting two aspects that can be considered as fundamental in the analysis of the tourism phenomenon in the COVID-19 era. The first aspect aims at emphasizing the evidence of the deep integration between tourism sectors that characterizes both the global and the Italian scenario. This osmosis, as will be seen below, is particularly present between airport flows and flows in accommodation. On the one hand, it has represented a critical element with respect to the pandemic impacts that have, therefore, could triggered negative dynamics in chain. On the other hand, both in the immediate future in terms of counter-reactions and new management methods, it has allowed the operators to perceive the advantages and opportunities of codifying this integration in a systematic way. This for a general usefulness even when COVID-19 will be eradicated, as well as for defence for any, and unfortunately probable, upcoming disruption events, such as other pandemics, or terrorist attacks, or cataclysms. The second aspect concerns with the possible added value deriving from the comparison of the current situation with previous worldwide crises leading to changes, among other issues, in the main indicators of tourism activities.

As regards the data sources, at national level the research has focused on the recent analyses carried out by ISTAT in the year 2020 on air transport data for passengers and for freight and mail as well as air traffic data by airports, airlines and aircraft. In accordance with the EU Regulation no. 437/2003 and subsequent amendments and additions, the ISTAT survey's field of observation consists of the movements registered in national airports (with an annual number of passengers exceeding 15,000 units) of Italian and foreign aircraft and the related cargo transported (passengers, cargo and mail). Trade movements are registered - scheduled and non-scheduled (charter) flights, while State flights are excluded. From the point of view of specific data relating only to the airport numbers, the Assaeroporti database was consulted; this association of Italian airports represents, at national and European institutions, 32 airport management companies for 42 airports. For the analysis of the international scenario relating to critical events and crises in the past, as a reference to compare the ongoing pandemic phenomenon for a better understanding and counter-reaction, as well as for the air industry data, the World Bank database was consulted. It has provided consolidated and in-depth data on both tourist flows and airport flows. As concern the cruise tourism were consulted data relating to the periodic monitoring made by CLIA, Cruise Lines International Association, the world's largest private cruise industry trade association.

2. Tourism in the COVID-19 era. A global framework

The world is currently in the throes of the COVID-19 pandemic: it has halted the tourism sector and created an unprecedented global economic crisis (Grech et al., 2020). The global pandemic is in fact having a huge impact on the international economy and the tourism industry. According to the Institute of International Finance this crisis could be considered the third but greatest financial and social nightmare of the current century, after 9/11 and the global financial crisis of 2008 (IIF, 2020). Even the tourism industry, one of the most profitable, has been heavily hit by the crisis and countries are developing recovery measures, rethinking the sector, and promoting their own nation (OECD, 2020).

In the words of the World Travel and Tourism Council (WTTC), the travel and tourism sector is facing unprecedented challenges and an existential threat from the impact of this virus globally. Barriers to global travel, such as quarantine measures, blanket anti-travel advisories, inadequate testing and tracing, limited adoption of global health and safety protocols, a lack of coordination across governments and between public and private sectors, and a second wave of infections are all leading to significant economic losses (WTTC, 2020). Since the supply side and the demand side of the tourism industry equilibrium has been disrupted, it will arise an inevitable competition between countries for tourists. These are the main reasons why it's essential that governments recognise this and implement measures that will safely re-start and facilitate the faster recovery of the travel and tourism sector and save millions of people whose livelihoods depend on it (WTTC, 2020).

Because of decreased connections, inflight social distancing (with airplanes only half filled at "full" capacity) and other restrictions on the industry due to the continued presence of the virus (Gössling et al., 2020b) the United Nations World Tourism Organization (UNWTO) estimates huge tourism declines in 2020 with trillions of dollars in revenue losses (UNWTO, 2020a), as international tourism is set to plunge by 80% (UNWTO, 2020b). For these reasons, the World Travel and Tourism Council (WTTC) noted that COVID-19 is exerting a domino effect on the entire global economy, threatening the livelihoods of 300 million people – one in 10 of the global workforces – employed in the tourism/hospitality industry, an industry which accounts for 319 million jobs and generates 10.4% of total gross domestic product (WTTC, 2020). In a dramatic communication, the UNWTO (UNWTO, 2020c) warns: "*with small and medium-sized enterprises making up 80% of the sector worldwide, the wider social impact of the crisis will go far beyond tourism, making it a key concern for the international community*". In short, the COVID-19 pandemic will probably be the toughest stress test ever for the entire tourism industry and, when over, travellers will surely find a changed industry. The changes will take place in various ways.

Widespread fear, social distancing, closed borders, travel restrictions and quarantine are having serious negative effects on the tourism sector: mass cancellation of hotel and flight reservations, cruise ships anchored in the ports; arts and cultural industries threatened. A worrying scenario, particularly from the socioeconomical point of view.

As argued by (UNWTO, 2020 a, b, e) e OECD (OECD, 2020) tourism is globally one of the sectors most affected by the COVID-19 pandemic, impacting economies, livelihoods, public services and opportunities on all continents. All parts of its huge value-chain have been affected. Tourism supports one in 10 jobs and provides livelihoods for many millions more in both developing and developed economies. In some Small Island Developing States (SIDS), tourism has accounted for as much as 80% of exports, while it also represents important shares of national economies in both developed and developing countries. As many as 100 million direct tourism jobs are at risk, in addition to sectors associated with tourism such as labour-intensive accommodation and food services industries that provide employment for 144 million workers worldwide. Small businesses (which shoulder 80% of global tourism) are particularly vulnerable. Women, who make up 54% of the tourism workforce, youth and workers in the informal economy are among the most at-risk categories. No nation will be unaffected. Destinations most reliant on tourism for jobs and economic growth are likely to be hit hardest: SIDS, Least Developed Countries (LDCs) and African countries. In Africa, the sector represented 10% of all exports in 2019. In addition to this, many intangible cultural heritage practices such as traditional festivals and gatherings have been halted or postponed, and with the closure of markets for handicrafts, products and other goods, indigenous women's revenues have been particularly impacted. 90% of countries have closed their World Heritage Sites, with immense socio-economic consequences for communities reliant on tourism. Further, 90% of museums closed and 13% may never reopen.

The global dimension of the COVID-19 phenomenon ties with its regional and local impact, highly heterogeneous, with a strong territorial dimension that has important consequences for crisis management and policy responses. It follows a mosaic of different actions in different geographical contexts, united by the purpose of undertake a serious reflection on the role of all agents and actors, regarding the measures and alternatives to be adopted in response to the crisis, in a short, medium perspective and long term.

COVID-19 is addressed as an opportunity to rebuild the tourism industry from a vision more aligned with the great challenges of humanity: environmental, social and technological (Higgins-Desbiolles, 2020a; Nepal, 2020). While the main concern in this industry was the sustainability of destinations (Cheer and Lew, 2017) this pandemic has shown its fragility in the face of threats derived from health and safety (Higgins-Desbiolles, 2020b). Both issues are now key in the process of converting destinations into smart destinations, given the advantages of technologies with respect to sustainability, accessibility, and also public health and safety. The resilience of this industry is expected to show again, but a transformation is urgent. This crisis should be exploited to make structural changes in tourism activity towards a model based on an inclusive and respectful relationship between tourist and territory.

Tourism is made from people to people, and these are the main ones affected by the pandemic: everything is changing in economic terms but also in psychological terms and in the predisposition to travel (Qiu et al., 2020). The behaviour of tourists will necessarily be different in the short and medium term. People will look for destinations that are closer, safer, sustainable. The future of tourism deal with some questions even if one images a better situation with the COVID-19 under control, or at least under containment. As if nothing had happened, will it find again the exponential growth experienced over the last forty years, with tourists flocking back to the air, to the overcrowded motorways, to the overcrowded cruise ships, to the overcrowded beaches? The opinions most critical of the mass tourism model emphasize the direct relationship between the rapid spread of the virus and the hypermobility promoted by tourist facilities. For these voices, what this crisis has revealed has been the need for the tourism sector to decrease in an orderly, slow and continuous manner. From this point of view, until now, the growth axes of the tourist industry have been enclaving tourism and the overcrowding of the activity; it has barely made an effort to seek a sustainable expansion strategy with spaces and user safety (Páez, 2020).

In other words, all actors need to collaborate closely to shape a new agenda, which needs to be centred on sustainability in all its dimensions. Only then it can be possible to make a successful use of the SDGs as a blueprint for building a more equitable, sustainable and thus resilient world (OECD, 2020). It can be useful both at global as regional level, acting important changes with regards to mass tourism as to "niche tourism". In fact, the low tide of the crisis affected both the global players in the tourism economy and the local SME.

3. Crucial tourism sectors. Air and Cruise Tourism facing the pandemic crisis

The analysis of the tourism crucial sectors in the COVID-19 era can be run by considering two issues, antithetical to each other, since they show a greater impact in forecasting scenarios.

The first one looks at the past, and in particular at the last twenty years, when the crucial sectors of Air, Cruise and Coastal Tourism had to face the international terrorism by developing defense policies based on a preventive and not extemporaneous planning approach. Tourist destinations and air flights have, in fact, become the preferred targets of terrorist attacks targets as they were considered emblematic icons of an ephemeral and immoral way of life. The fundamental difference of tourist activities compared to other economic activities lies in the fact of greater and more rapid variability of the choices made by tourists as a result of a destabilizing action, such as that of a terrorist attack, or climatic events. For the other activities the so-called “system stability”, namely the capacity to resist to external perturbations by returning to the condition of equilibrium or moving towards a new condition of equilibrium, is now quite high and consolidated. In the tourism sector, which is mainly relates to the management of leisure and entertainment for consumers-tourists, the actions to be taken lower this resistance in relation coming under an unnecessary dimension.

There is no lack of cases that demonstrate this evidence. On 26 June 2015 a mass shooting occurred at the tourist resort at Port El Kantaoui, about 10 kilometers north of the city of Sousse, Tunisia. Thirty-eight people, 30 of whom were British, were killed when a gunman, apparently a normal bather, attacked a hotel. This unleashed a sudden and massive cancellation of many bookings, not only in that area but also in many other seaside locations that could constitute the same type of target. The images of the London and Manchester massacres had the same effect on flight cancellations.

Faced with these events, the whole world tourism sector worked to find a strategic and shared way to codify a roadmap aimed at countering the impacts of what is now known as “asymmetric warfare”. This effort leads the tourist players to undertake twofold kind of actions. On the one hand, the interventions were focused on the need to strengthen and modify the information system towards the tourist in order to generate the necessary risk-awareness and minimize its impacts on booking and travel. On the other hand, great efforts have been made to improve the security system of the tourism sector, through actions of prevention, monitoring and training of the HR managers of the crisis events.

In short, the tourism industry has reacted trying to change an emergency scenario, triggered by extemporaneous threats, into another scenario characterized by conscious and measured constant exposure to a risky event. It can be metaphorically be said that the critical tourist sectors – that are Air, Cruise and Coastal Tourism as mentioned before – reacted in the recent past up to the pandemic event adopting an approach typical of the exposure phenomena to the volcanic risk, emphasizing the strategic combination of threat and risk awareness to which the population is exposed together with the safety plan relating to any escalation of risk levels. An approach in line with the guidelines on security policies based on risk perception and management and, more in general, on crisis governance. For example, a study by Radic investigate the theme of risk management in the cruise field (Radic, 2015).

This pre-COVID premise and digression is useful to highlight how these three crucial sectors have not walked into the COVID pandemic situation totally unprepared. However, and here it is necessary to introduce the second issue cited at the beginning of the paragraph, this pandemic has presented itself with a distinctive feature, both in terms of intensity and speed of effects: it’s so strong that the various tourist organizations, even if they have already been boats sailing in troubled waters, they have now to face the biggest Tsunami ever.

The flight flows experienced a dramatic decrease with rapid and drastic declines in air travel demand amplified by stringent travel restrictions, as has cruising which has even assumed the metaphorical form of the source of the risk following the various cases of infections and deaths on board ships. Despite some geographical and temporal gradients, coastal tourism seems to be the only sector able to take itself afloat.

3.1 The Air sector

In light of the COVID-19 outbreak, many researches have been mainly focused on the measures that airports should take to contain health pandemics, while giving little importance to the economic consequences of the crisis on the travel and tourism industry (Gössling et al., 2020a). Considering the coverage and density of national and international flights and linking it with the situation generated by the lockdown and anti-contagion measures adopted by the States during the last months, the very strong impact on the sector is absolutely clear. A perception of the phenomenon can be noticed by comparing the data on air traffic flow in an ordinary weekday (Figure 1) with the map of the States closed on 31 March 2020 (Figure 2).

Variables	Italian Air Transport Data
Enterprises (number)	193
Turnover (thousands of euros)	9,351,319
Production value (thousands of euros)	9,998,527
Added Value at factor cost (thousands of euros)	1,922,027
Employed (number)	19,486
Employees (number)	19,430
Average company size (number of employees)	101.0
capite-Added value pro	98.6

Table 1. Italian air transport data. Source: Authors' elaboration from data ISTAT (2020a).

Air transport accounts for 2.4% of world GDP, about 1,800 billion dollars. The entire supply chain employs nearly 29 million people, including direct, indirect and induced employment. The most significant component in terms of employees is represented by airport services (62% out of more than 10 million direct employees) followed by airlines employees (26%) and aircraft manufacturing industry (12%) (ISTAT, 2020b).

Air transport also plays an important role in Italy, accounting for 1.8% of national production and employment (CDP, 2020). Other data on the Italian scenario, coming from the latest ISTAT survey, are shown in the Table 1.

Italy is the fifth country in the EU ranking by number of passengers carried, preceded in order by the United Kingdom, Germany, Spain, France. It even ranks second, preceded only by Spain, as concerns the transport of passengers within the national territory. In 2019, 193 million passengers transited through the 39 Italian airports monitored by Assaeroporti, or 7.4 million more than the previous year in line with the positive trend of previous years (+4%), though with a rate growth lower than the 5.9% in 2018 and the +6.4% in 2017. In particular, Fiumicino, the ninth airport in Europe for the overall flow of passengers (43.5 million), has increased its passenger volume by 1.3% compared to 2018 and Malpensa much as 16.7% (Assaeroporti, 2019).

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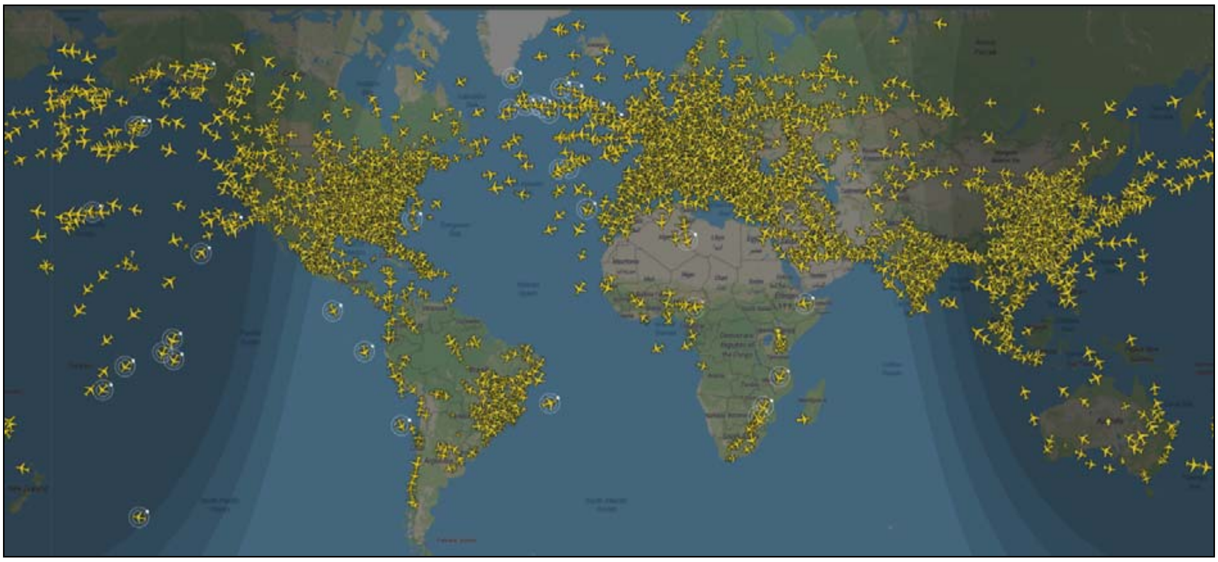

Figure 1. Geographic coverage of air flows on a generic weekday. Source: Flightradar24.

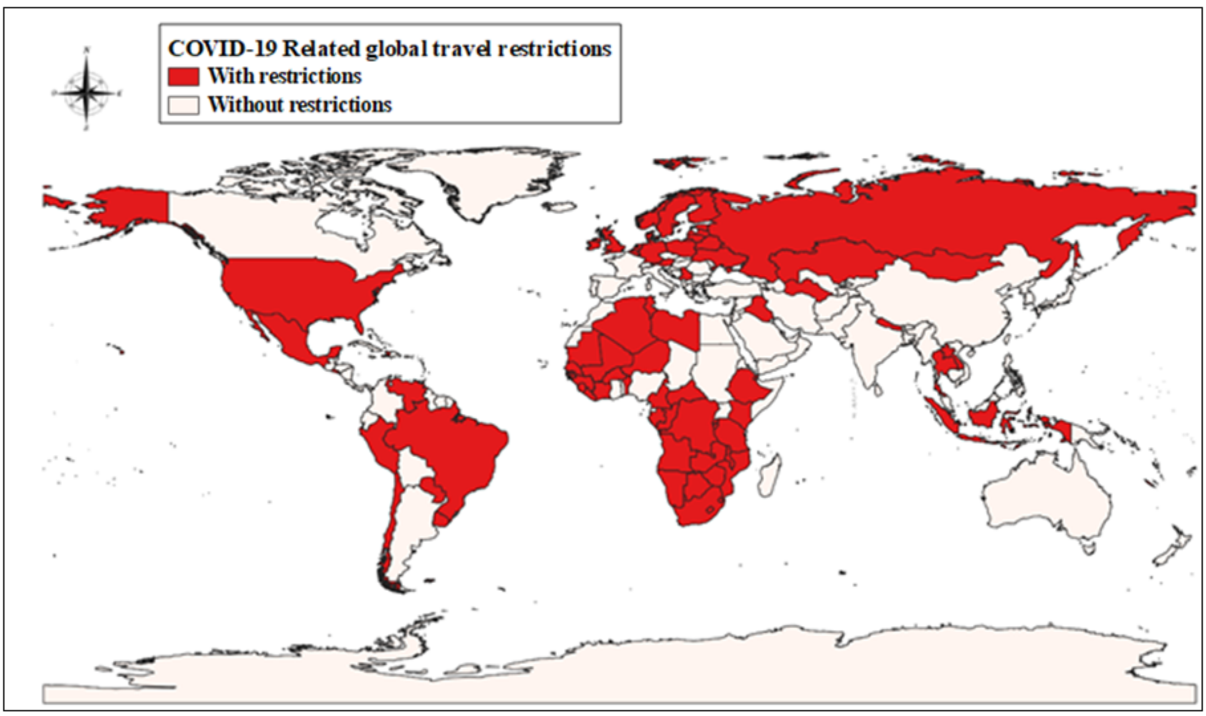

Figure 2. March 2020' Covid-19 Related global travel restrictions. Sources: Authors' elaboration on IATA data (2020c) and on country travel advisory/restriction websites on 31 March.

The Figure 3 shows the effects of the pandemic wave in the first months of 2020.

The passenger traffic in Italy by international flights during the 2009-2018 decade, shows the same trend as that of foreign customers in the Italian resort accommodations at the same time. It highlights that international tourism and air travel are strongly correlated (Figure 4).

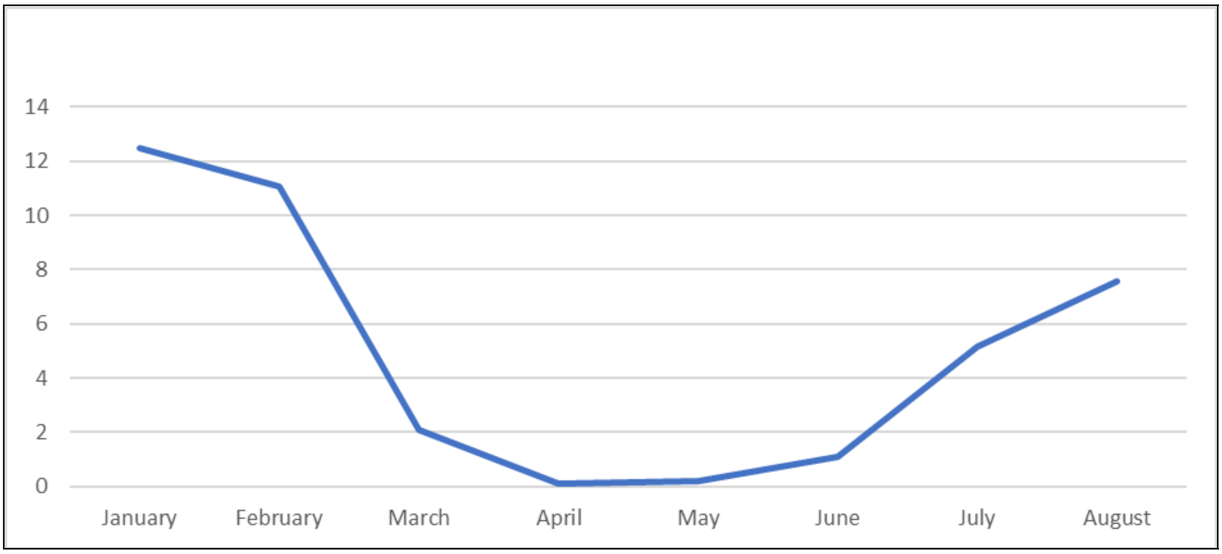

Figure 3. Number of passengers traveling through Italian airports in 2020 (values for 10^6). Source: Authors' elaboration on Assaeroporti data (2020).

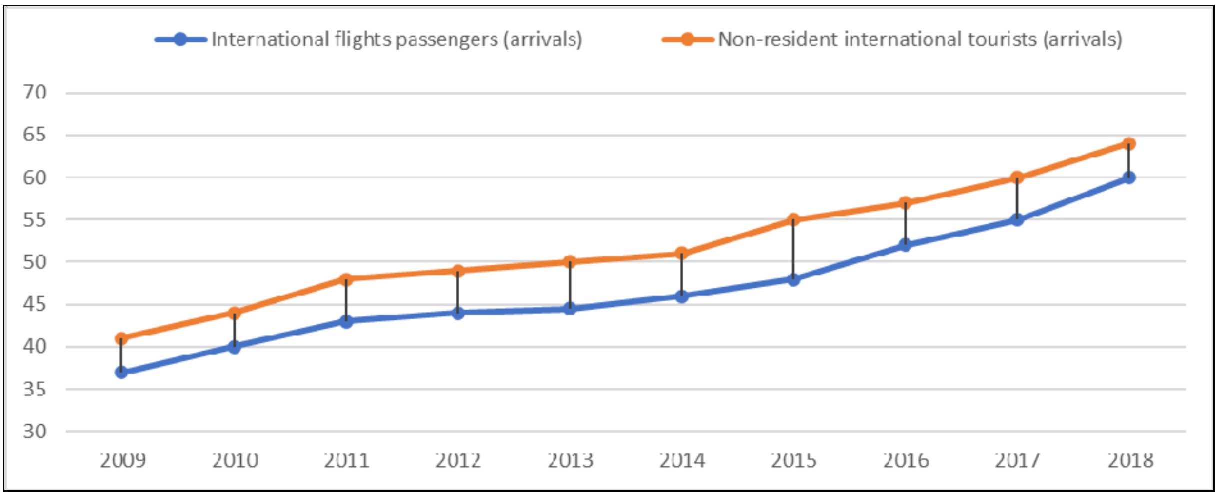

Figure 4. Arrivals of passengers on international flights and arrivals of non-resident tourists in hotels and non-hotels accommodation in Italy. Years 2009- 2018 (values for 10^6). Source: Authors' elaboration on ISTAT data (2020b).

The shock wave of the pandemic has completely sent this sector into crisis. The carriers dramatically shift its fleet and route. The more worrying aspect is the fact that it is absolutely impossible to forecast the future scenario. On the one hand, in fact, the operators in the sector have for years been experts in outline future predictions on the nature and size of the flows starting from the time series of data relating to previous years. On the other hand, it must be considered that the uncertain situations of knowledge – due to extraordinary exogenous events such as the COVID-19 pandemic – limit the ability to structure a decision-making process for the future actions to be taken. As a consequence, this push the air tourism industry to face unsystematic risks for which it seems to be unprepared (Williams and Baláž, 2015). Furthermore, too often the air transport has been wrongly considered a homogeneous sector, as it is instead composed of a highly heterogeneous set of operators (Meersman et al., 2008) making its reaction to the pandemic effects even more difficult. The International Air Transport Association (IATA) has estimated, in fact, that at the end of 2020 the carriers will halve their turnover and record losses of 84.3 billion dollars. The global debt of the companies will be 120 billion higher than the level at the end of 2019, for a total of $ 550 billion, representing approximately 92% of the expected revenues for next year (IATA, 2020a). According to IATA estimates (IATA, 2020b), the receipts will drop by 50% this year to $ 419 billion, and then rise to $ 598 billion in 2021, while passengers will decrease by 54.8%, from $ 4,543 billion a year to 2,246 billion in 2020, before partially recovering to 3,384 billion in 2021. The most affected companies will be those located in the Asia-Pacific region with total losses of 29 billion dollars, followed by those in North America (23.1 billion) and those in Europe (-21.5 billion).

The flights reduction impacts not only on the budget of the airline companies but also, and above all, on the employment level. Despite furlough schemes that have kept tens of millions of people employed, a tsunami of job cuts is about to hit as companies downsize. British Airways, Virgin Atlantic and EasyJet have already announced the loss of nearly 20,000 jobs. United Airlines furlough up to 36,000 employees, while Air France-KLM plans to cut more than 7,500 jobs at its French arm as the airline industry reels from the coronavirus crisis. Roughly 22,000 at Lufthansa are liable to lose their jobs. Ryanair is planning to cut 3,000 jobs and reduce staff pay by up to a fifth in response to the COVID-19 crisis. The no-frills airline said it was cutting 15% of its 20,000-strong workforce as it did not expect passenger numbers or pricing to return to pre-coronavirus levels until summer 2022 at the earliest. Sweeping measures include pay cuts and closure of some bases until crisis eases. Britain's easyJet EZJ. L plans to cut up to 4,500 jobs and shrink its fleet to adjust to the smaller travel market which is forecast to emerge from the coronavirus crisis.

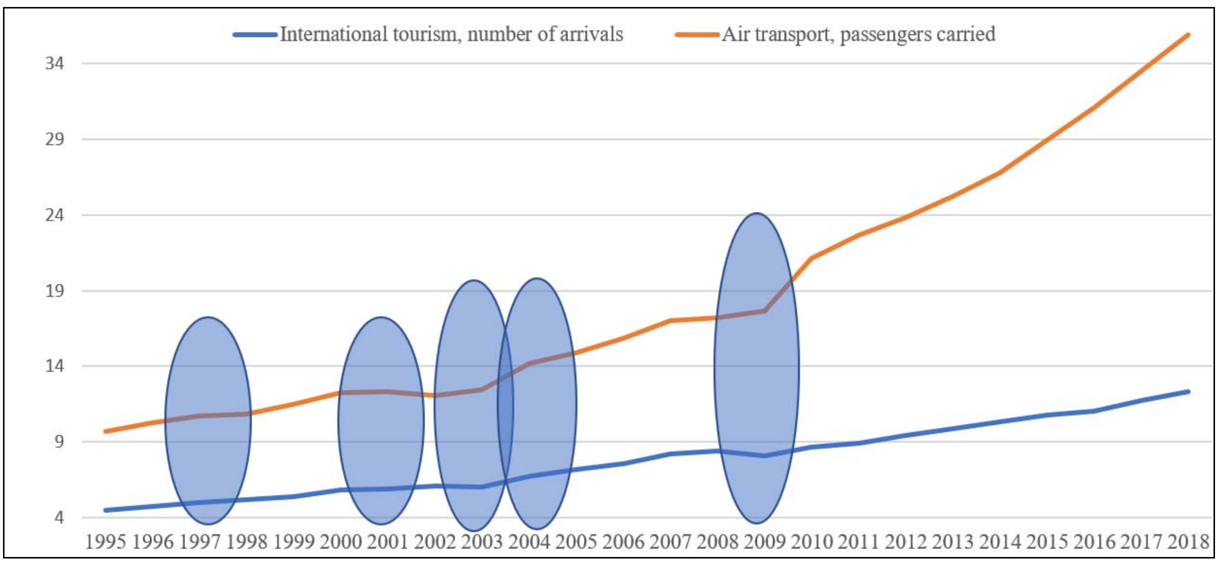

Figure 5. Impact of major crisis events on global tourism. International tourism, number of arrivals and passengers carried (values for 10^6). Source: Authors' elaboration on World Bank data (2020a, 2020b).

Unlike the cruise sector and its growth, as seen in the following section, for the air tourism sector the pandemic event represented in some ways a further decline phase of the negative cycle started with the 2008 crisis.

And looking even further back (Figure 5), the three months between March to May 2003, after the implementation of the control measures, recorded a −77.6% and −57.0% drop in passenger traffic in the two important hubs of Hong Kong

International Airport and Singapore Changi Airport; between March to May 2009 the variations were −7.88% and −4.12% cause the airports were guarding against Swine Flu (Chung, 2015). The spectrum of recent crises impacting on the tourism and air industry is large, ranging from terrorism attacks in Madrid (2004), Jakarta (2003) and New York (September 11, 2001) (Goodrich, 2002), natural disasters such as the tsunami affecting large parts of coastal South East Asia in 2004 (Sharpley, 2005), as well as the Asian economic crisis in 1997 to health-related threats such as the Severe Acute Respiratory Syndrome (SARS) and bird flu epidemics in South East Asia (in 2003/2004) (Pforr, 2006).

The ongoing coronavirus disease is different from previous pandemic because it has a longer incubation period and less distinguishable symptoms, which facilitate its spread (Chinazzi et al., 2020).

Therefore, at this stage it's rather impossible to predict future scenarios. It can be observed that the strategies for the revitalization of tourist flows are co-developed by airlines and tour operator, covering a massive use of big data. In this direction UNWTO says that is essential to adopted decisions and strategies should be based on empirical basis, especially in times of crisis (UNWTO, 2020d). As measure to mitigate the socio-economic impact of COVID-19 and accelerate recovery, it proposes to invest in data, analysis and networks that will allow for detailed and short-term monitoring of tourism development and its effects. However, it remains to overcome the political decision-making level or even if the technical problems will be faced the political barriers risks to remain and to delay the resumption (Nutley and Davies, 2000).

3.2 The Cruise sector

The fear generated by the COVID-19 cruise tourism crisis has induced a devastating crash in the value of major cruise lines stocks (Radic et al., 2020), where Royal Caribbean Cruises Ltd shares dropped 82.31%, Norwegian Cruise Line Holdings shares dropped 85.17%, and Carnival Corporation & Plc shares dropped 76.61% from 2 January 2020 to 23 March 2020 (Nasdaq, 2020).

As Moriarty et al. (2020, p. 347) affirm: "Cruise ships are often settings for outbreaks of infectious diseases because of their closed environment, contact between travelers from many countries, and crew transfers between ships".

On 14 March 2020, the Centers for Disease Control and Prevention (CDCP), a component of the U.S. Department of Health and Human Services (HHS), announced a No Sail Order for all cruise ships defined as commercial, non-cargo, passenger-carrying vessels with the capacity to carry 250 or more individuals (passengers and crew). This order continued to suspend passenger operations on cruise ships due to two extension through 16 July and 30 September (CDCP, 2020).

The Italian Minister of Infrastructure and Transport Paola De Micheli has signed on 15 March 2020, with the Minister of Health Roberto Speranza, the decree with which cruise services for Italian passenger ships were suspended and the arrival in Italian ports were blocked of cruise ships flying the foreign flag. Italy has closed its ports to foreign cruise ships and suspended the operation of its own services. Having ensured the execution of all the health prevention measures ordered by the competent Authorities, all the management companies, shipowners and masters of the Italian passenger ships used in cruise services will disembark all the passengers on boarding the port of end of cruise if not already landed in previous stopovers.

According to the Cruise Lines International Association (CLIA) analysis, cruising sustained 1,177,000 jobs equalling $50.24 billion in wages and salaries and $150 billion total output worldwide in 2018. To meet increasing demand, CLIA Cruise Lines were scheduled to debut 19 new ocean ships resulting in a total of 278 CLIA Cruise Line ocean ships in operation by the end of 2020. The data showed 32 million passengers expected to set sail in 2020, instead so far there has been a 50% share of cancellations on bookings made in the pre-COVID era (CLIA, 2020; CIN, 2020).

In the decade 2010-2019, the CLIA data show that some usual destination such as the Caribbean and the Mediterranean are consolidated, while some European and Asiatic destinations increase their own passenger traffic volume (Figure 6).

The comparison between these flows (Figure 6) with the prohibitions imposed in March by the various states as a measure to contain the pandemic (Figure 2) outlines the deep impact of this phenomenon on cruise tourism activities. As regards Italy, the forecasts established that cruises would reach the new record of 13.07 million passengers (embarkations, disembarkations and transits) in 2020, +6.7% compared to 2019, whose breakdown of passenger movement is shown in Figure 6.

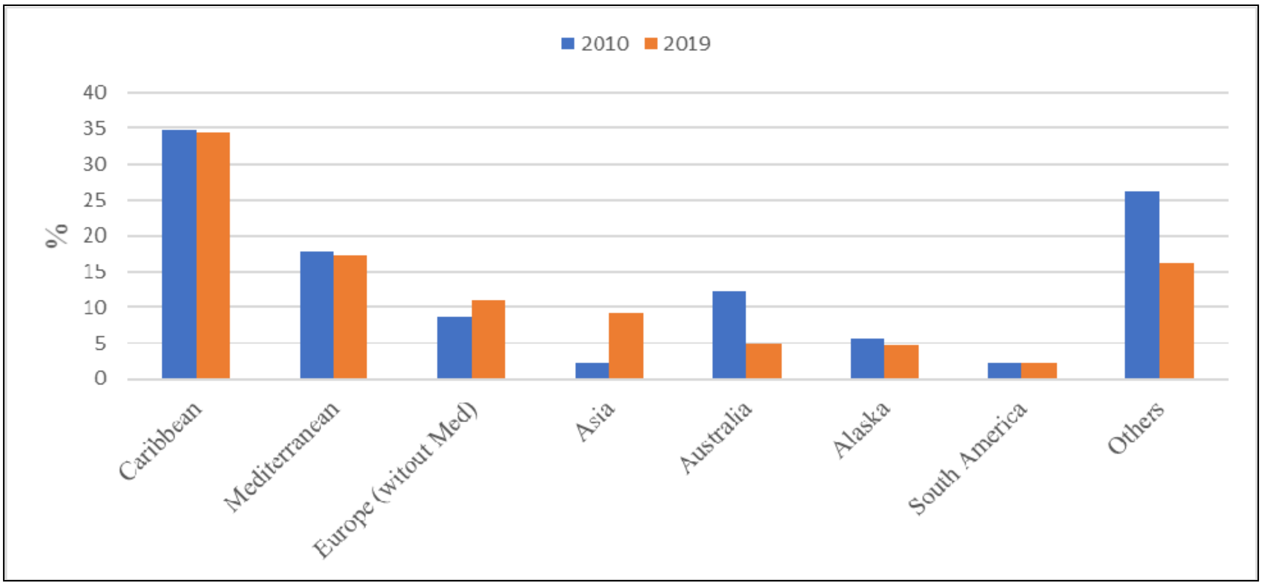

Figure 6. Distribution of passenger movements by destination and by comparison 2010-2019. Source: Authors' elaboration on CLIA data (2020).

Updated forecasts for 2020 (Figure 7) coming from the results of 51 cruise ports feedbacks, confirmed the further growth of traffic in Italy, the third consecutive positive change. If the forecasts had been respected, the Italian ports could have risen from 10 million cruise passengers handled in 2017 to over 13 million at the end of 2020, setting a further traffic record in Italy (in absolute terms, over 800 thousand more cruise passengers and numerous records registered in Civitavecchia, Naples, Genoa and La Spezia ports).

A point that deserves to be highlighted is the adaptive reaction currently demonstrated by the main tourist cruise lines, and in particular by MSC, concerning the proposal of reliable and safe advanced technological services for smart working. In this perspective, cruise carrier companies have developed a marketing strategy based on three assets in order to resume tourist flows on cruises. Firstly, economic incentive tools have been used as policy. Secondly, security protocols have been implemented to prevent contagion and manage any positive cases. Finally, the third strategic line was aiming at exploiting the rapid paradigmatic change in the remote working method pushed by the COVID situation, combining working and free time in a single agreeable spatial dimension such as that offered by a cruise, as directly noticeable in the online booking interface.

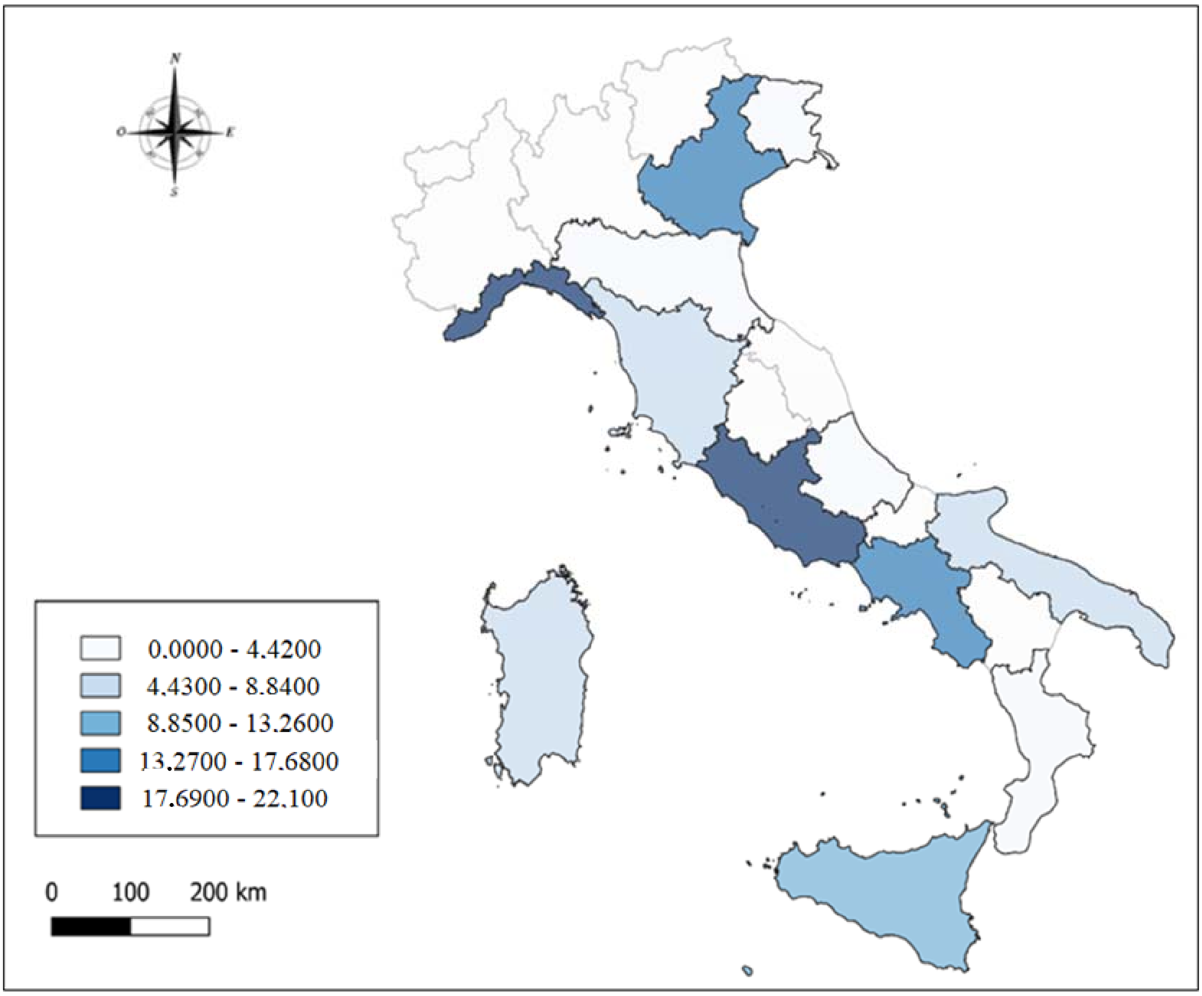

Figure 7. 2020 Forecast of passenger movements (%) by Italian regions in the absence of COVID-19. Source: Authors' elaboration on data from Risposte Turismo (2020).

4. Coastal Tourism and Inland Areas: some positive outcomes

Unlike the shared critical scenarios described in the previous paragraph, concerning air and cruise tourism sectors, it can be noticed that some territories or tourist products are being impacted by Coronavirus in different ways. That's the reason why one can observe some positive enhancement of some areas counter to the dominant declining trend. Moreover, it can be stated that this situation – which apparently might seem a positive anomaly – constitutes a dynamic already known in the global economic crises' context: some territories, often those moving from critical conditions, rise again and create a counterfactual evidence. Thus, for example, during the 2008 crisis some Eastern European countries recorded an improvement in their local economic conditions while in a global unbalance situation. Going further back, the impacts of 2004 tsunami disasters around the Indian Ocean, with a reduction of tourist movement in this part of the world in 2005th year by almost 40% compared to 2004th year (Blažin et al., 2014), allow to understand how "crisis" be turned into an "opportunity" for a rehabilitation plan (Buultjens et al., 2014).

Some positive evidence can be observed in the ongoing pandemic situation, related to the stability of coastal areas and inland areas. The latter have in some cases even showed an improvement if compared to past years. As what happened in most Western Countries, the Italian coastal areas, although not visited by usual international tourist flows in the summer of 2020, have benefited in proximity tourism flow. With some exceptions (for example the Ligurian Coast and Cinque Terre) where tourist flows are more homogeneously spread throughout the year, the coastal destinations of the Mediterranean are generally characterized by a strong seasonality in the summer season, for this view with a negative meaning. Whereas compared to the COVID-19 epidemic diffusion curve and the summer situation, the concentration of flows takes a positive value. The proximity tourists can be divided into three main categories of visitors: the "identarian" i.e. the Italian tourists who spend their holidays in their region of residence; the "xenophiles" i.e. the Italian tourists residing in a specific region who every year choose abroad holiday destination but due to COVID they have to remain in Italy during the summer; and, finally, the "nationalists" i.e. a cluster representing Italian tourists residing in a specific administrative region who choose to spend their holidays in Italy but outside their regional territory of residence. Domestic tourism is expected to recover more quickly. It offers the main chance for driving recovery, particularly in countries, regions and cities where the sector supports many jobs and businesses.

In this direction, a survey on the TATUR, the regional tourist membership rate carried out by Demoskopica shows a good performance of Campania, Sicily and Sardinia regions during the summer months of 2020. This dynamic avoided the tourism sector's failure, however only partially compensating for the effects of the pandemic shock wave. Unlike the inland areas' situation, in fact, the various regions recorded a significant coastal tourist flow slowdown compared to the previous year.

Psychological factors, related to the fear of contamination, impact on the willingness to travel far away and on the conditions of and preferences for holiday proximity destinations (Navarro et al., 2020). This explains why increasing tourist flows have been attracted in the inland areas, in a similar way to what happened in the coastal ones. Consumer preferences shifted prominently from mass tourism towards less crowded touristic destinations. Even if no rigorous data can nowadays support this trend, it's possible to quote a simple sentiment analysis conducted through the analysis of the main booking and review portals of tourist resorts that confirms an unusual preference for more inland sites and outside the big tourism circuits. Novel forms of alternative and more sustainable tourism, as well as wider territorial spread of tourists can accommodate these preferences and at the same time help address a number of adverse effects of mass tourism (in cities, touristic villages, famous natural destinations.), even those not related to the COVID-19 crisis. In avoiding overcrowded places, tourists show preferences for destinations with outdoor activities and contact with the nature (DNA, 2020; Interface Tourism, 2020; Gursoy et al., 2020), away from big cities (VVF, 2020).

The case of the inland areas is even more significant due to its emblematic discontinuity with compared to the past when, albeit without the pandemic issues, most of them were unable to develop good tourist attraction strategies. Nevertheless, Italian inner areas are rich in cultural and natural resources (Forleo et al., 2017), a heritage that that makes them unique and attractive at the same time (Cerutti, 2019). Tourism may constitute an engine for their economic growth (MIBACT, 2017), as acknowledged by the Strategia Nazionale Aree Interne (SNAI, in English Inner Areas National Strategy) since 2012 (Lucatelli, 2016).

In recent year, a great number of scientific literature, especially in the field of geography (for example, Ciaschi and Vincenti, 2019; Gasparini, 2019; Pettenati, 2016; Barca et al., 2014) have shown that the inner areas are characterised by critical features (Table 2) – including physical inaccessibility and low network clustering in the work and social sphere with the external areas – so much that they could be defined as "market failure areas" in relation with the necessary infrastructural interventions to be made by private operators or even by public bodies (de Falco, 2020).

In the COVID-19 era, the critical nature of the situation induced by these factors, paradoxically, become a defence against the spread of the infection (Table 1). However, this mechanism has a two-stage character related to two possible phases of contagion spread. The first phase is the one in which the infection does not spread or has

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low levels of intensity, as no infected person penetrate from the outside triggering the contagion spread. However, if it happens that the natural defence – often associated to the morphology of the internal areas that creates inaccessibility – is overcome and a contagion is triggered, then there is a strong likelihood of the dynamic reaching the critical mass in the form of an outbreak: in this case, the curve of contagion grows rapidly and to a greater extent than non-inner areas (de Falco, 2020).

Inner Area Features	Valence of Contagion	Literature References
Territorial Fragmentation	+	Ciaschi and Vincenti, 2019
Lack of work	+	Marchetti et al., 2017
Lack of essential services	-	Barca, 2014
Inaccessibility	+	Ciaschi and Vincenti, 2019; Barca, 2014
Sense of community	+	Arminio, 2013; Ricciardi, 2011.

Table 2. Inner areas' features. Source: de Falco, 2020.

This dynamic of the inner areas has created a sort of paradigm of safety against the risk of contagion. Therefore, the attributes generally negative of the inland areas play a positive role as protective factors within the territorial context chosen by tourists to enjoy a safe holiday. To confirm the validity of the binomial inland areas and safe holiday, the counterfactual data relating to the tourist flows in famous and very accessible places reveal that the overcrowding, antithetically to the natural and less social character of the internal tourist areas, turned out to be a negative factor in catalysis of the contagion processes. In fact, some coastal destinations in Sardinia have witnessed a surge in coronavirus cases.

As regards the destinations and the related tourist products, it can be stated that in Italy the situation is complex, fragmented but at the same time it reveals some positive notes basically in line with what just assessed. The coronavirus crisis could represent an opportunity to rebuild the tourism supply in a more sustainable manner, shifting from an approach base on the assumption of tourism as an economic industry to the shared idea of its role as territorial development lever. During the summer 2020, the Italian destinations have detected the following common elements: careful fruition of tourist resources, domestic and proximity flows, small-micro hospitality, changes in mobility and sites. It's the framework that emerged from the survey that the Study Center of the *Touring Club Italiano* (TCI) conducted in partnership with *Hertz Italia* on the TCI community, made up of over 300 thousand people (TCI, Hertz, 2020). Coronavirus has certainly changed the way people travel (69%). A proximity tourism was preferred (72%) and more prudent behaviours were adopted to reduce the risk of contagion: fewer events and museums than last year (67%), preference for little-known and presumably less crowded destinations (59%), less frequent attendance at bars and restaurants (58%). The most popular regions were Trentino-Alto Adige, Tuscany, Sardinia and Puglia. Residents of Northern Italy, traditionally the "engines" of domestic flows, have shown that they appreciate more trips to Lombardy, Piedmont and Veneto and, in general, to the central-northern regions. Costal destinations and beach tourism are the favourite (44%), followed by the mountains (26%) which recorded a very strong increase compared to last year (15%). The role played this year by the villages and by the hinterland more generally is important (7%, compared to 1% in 2019), which sees Tuscany, Umbria and Marche as the preferred regions. On the other hand, the collapse of the art cities has been confirmed, passing from 10% to 4%. If in one hand it can be observed that the low tide of international flows didn't be balanced by the domestic ones, on the other hands the latter reveal interesting changes in size and direction. Small villages in the mountains or hills, experiences

This testify that although this situation makes tourism highly vulnerable, it is still in a unique position to contribute to broader and just recovery plans and actions. National and regional tourism organisations could leverage this crisis into an opportunity, taking into account what happened in the summertime in relation with the different type of tourism.

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5. Conclusions

The COVID-19 pandemic has seen the tourism sector, as well as the whole world, greatly impacted. COVID-19 has changed the world forever in every imaginable respect and has impacted heavily on the international travel, tourism demand, and hospitality industry, which is one of the world's largest employers and is highly sensitive to significant shocks like the COVID-19 pandemic.

The COVID-19 pandemic of 2019-2020 has the potential to transform the tourism industry as well as the context in which it operates. This global crisis in which travel, tourism, hospitality and events have been shut down in many parts of the world, could provide at the same time an opportunity to uncover the transformative possibilities of this historic situation (Higgins-Desbiolles, 2020a).

After an introductory frame of the pandemic ongoing phenomenon, this paper has focused on the dynamics relating to the crucial sectors of air and cruise tourism, moving then to the analysis of the coastal and inland areas' situation. The proposed analysis has been developed through the consideration of three elements characterizing the current scenario: the relevance of the pandemic shock wave; the adaptability of companies and operators' behaviour to changes and challenges; the unexpected and countertrend situation of arising positive externalities in some areas, such as the internal ones.

The research has shown how these areas, precisely in relation to their characteristics of inaccessibility, since now considered a limit, have become a bulwark of safety and refuge from contagion, recording positive trends in tourist flows. In particular, what emerged is that the criticality induced by COVID-19 highlights some tendencies: some sectors, such as air transport, have to get used in recent years to facing threats of various types – such as terrorist attacks or previous epidemics. Other sectors need to increase their resilient efforts towards more sustainable actions and models. In this view, it is necessary to provide support tools for the decision-makers and tourist players, to evaluate the effective impact of each measure and their combination taken to face the complex interaction system regulating the pandemic dynamics.

More in general, the research notices the counter-reactions implemented in this direction, based both on a sustainable exposure to contagion risk and on marketing actions. As regards the latter aspect, the paradigmatic change in the management of free time is emblematic, as in this new global mode of smart working ends up coinciding with working time. The paper highlighted, in fact, as especially in the cruise sector the marketing strategies are leveraging the possibility of working through the availability of remote connection technological tools while being on vacation.

We believe that in the next future this could represent a strong discontinuity with the past which, even in the absence of COVID, could trigger social dynamics and the organization of private and working life according to criteria totally different from the consolidated ones to which the company was used.

It is unclear, at the time this article is being written, the extent of the long-term impact that the crisis imposed by the virus COVID-19 pandemic outbreak may have on society and economy, although it is already very certain that among the most affected sectors Travel and Tourism will be at the top of the list.

The astonishment caused by COVID-19 is that the anomaly takes the form of a virus that spreads within a few weeks to the entire planet for an indefinite period of time. Whether disturbances in the form of conflicts, terrorist acts, recessions or natural disasters can hinder tourist activity, it is economically acceptable although humanly tragic if, as experience has shown, the interruption is only local and temporary.

The outbreak of Coronavirus COVID-19 undoubtedly represents an important and evolving challenge to the tourism sector. Containment of the pandemic is the top priority and the tourism sector is committed to supporting all measures taken to contain the epidemic.

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