



Summary Report of impact evaluations of cultural tourism on target areas

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Purpose and scope of the deliverable

One of the SPOT project tasks was to collect comparative information on several themes. These themes are not directly part of the quantitative data collection but are a requirement for project reporting. We collected comparative data across the different case studies to put together into a summary report. Given the nature of these data, we decided to collect them as “expert” assessments from teams. The topics included: economic development and growth; impact on jobs; the impact of cultural tourism for de-industrialised areas, for peripheral areas, for cross-borders issues; how cultural tourism could promote tourist flows and how over-tourism could be managed. Finally, we included a section on the impact of COVID-19 on tourism. Each country is referred to by the international notation, but we should note that data was collected about case studies within countries, rather than the country as a whole. For this reason we have included a table below indicating how country notation is used and to which case study it refers.

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Notation used in this report

Country	Country notation	Case study area
Spain	ES	Barcelona Art Nouveau
Romania	RO	Buzău Carpathians
Greece	EL	The Cyclades Islands
Estonia	EE	Ida-Verumaa region
Netherlands	NL	Kinderdijk Windmill area
Hungary	HU	Komáron region of the Danube
Germany	DE	Lusatia region
Slovenia	SL	Ljubljana City
Poland	PL	Lower Silesia
UK	UK	Doune and Abbotsford in Scotland
Slovakia	DK	Nitra region
Italy	IT	Piedmont Literary Park
Czech Republic	CZ	Southern Moravian region
Austria	AT	Styrian Iron Route
Israel	IL	Beit She'an Valley

1. The contribution of cultural tourism to economic development and economic growth

Most countries did not have detailed statistics broken down to case study levels, although some had more general regional statistics. Nor were there statistics relating to cultural tourism as opposed to any other kind of tourism, so these comments were usually based on qualitative estimations and results of the various surveys and stakeholder roundtables that were carried out in 2020-2021.

The case studies were divided between those with a very strong tourist sector (ES, NL, EL) those with an up-and-coming cultural tourist industry (UK, SL CZ, AT, IL, PL, DE) and those with a less developed cultural tourism industry (SK, HU, RO, EE). In many instances the tourism industry was further threatened by the COVID lockdowns. A table is included above to indicate how the notation used in this report relates to countries and case studies.

In the former group of case studies, with well-developed tourism sectors, tourism was an important and established element of the local economy. For example, tourism in Barcelona generated at least 7.3% of the city's GDP in 2018 with nearly 20 million overnight stays and this has grown steadily since the 1992 Olympics first put the city on the map. The effect is that there is a feeling of over-tourism (referred to later). Targetting cultural tourism is seen as a way of raising the standards and improving the quality of tourism. In the Cyclades, it is recognised that tourism is the main economic driver of the regional economy, but there have been efforts to shift the type of tourism from sun, sea and sand to more cultural issues using pilgrimages, festivals, wine tasting etc., to attract higher income people and extend the tourist season beyond the summer. In NL, the Kinderdijk area has been boosted by UNESCO recognition, and the real problem is how to get tourists to linger in the area rather than just driving through it.

In the second group of case studies, those with up and coming tourism sectors, there is some investment in tourism and even UNESCO recognition (South Moravia for instance). Still, it was felt that cultural tourism, in particular, could be better developed. The focus on wine and gastronomy would be one possible way to do this and could also create cross-border linkages (see later). The role of second homes is mentioned as a way of developing local tourism. In SL there has been investment in rentals and accommodation and it is recognised that tourism could be (and is) an important economic sector. The concentration of museums and cultural monuments in the capital city helps to support this investment. In Slovakia, the Nitra area is recognised as contributing 7% to economic development, and state funding has helped to develop tourist routes and infrastructure (Kramáreková, Petrikovičová, Krogmann, Grežo, 2022). In Israel the 2018 master plan recognises the tourism potential of the Be'it Shean region, and new types of tourism are being developed in terms of cycling, walking, visiting kibbutzim and even "peace tourism" (Sofer, Shmuel, Amit-Cohen, Tchetichik, Shiff, Yaron, 2022). In the UK, the well-developed tourism industry in Scotland, relies on popular media representations for 1 in 5 of its visitors and the two case studies are among the most popular attractions. However, as in the Netherlands, there is a need to retain visitors in the area to benefit the local economy instead of having them just driving in and driving out again. In Germany, the efforts by the regional Government to develop the case study area involves the recognition of quality approval standards and state investment in infrastructures such as cycle and boating paths. However, the actual numbers of visitors is still thought to be rather low in comparison to other regions of Germany. In Poland, a number of attractions are recognised including castles and gardens. These traditions and cultures are becoming increasingly recognised. In Italy the region under study is making a transition from mainly industrial heritage to a more post-productivist one with the help of wine, gastronomy and other initiatives. The winemaking is well known and becoming even better

known as it expands, but is bolstered by other cultural events and industries, including creating a literature park, which is the main focus of the Italian case study. In Austria, there is a well-developed tourism industry. However, the case study region around Leoben is still mainly an industrial one where tourism is seen to be of minor importance for the regional economy and a reorientation towards tourism - particularly cultural tourism - is only at an early stage (Sandreister, Kern and Harfst 2022).

Of the case study areas, where tourism is less developed, there is the potential for more tourism in the Komáron area but disproportionate and uncoordinated investment from the Hungarian and the Slovak sides of the River Danube. It is hoped the investment in the restoration of cultural monuments will help to attract tourists in the future. In the Buzău Carpathians of Romania, there has been a marked increase in tourism and tourist accommodation since 2001 and a recognition of the contribution of tourism to GDP. However, community-based cultural tourism in the case study region is still relatively underdeveloped. In Estonia, the tourism potential of the Ida-Verumaa region has been undermined by a combination of COVID pandemic and the war in Ukraine discouraging Russian visitors. It seems that the potential for cultural tourism here has still to be realised.

2. How cultural tourism has contributed to increasing jobs

The extent to which jobs are created depends upon the level of development of tourism in general (see above). In ES, EL, UK and NL, and IT, a large part of the economy depends upon tourism, although it is not clear how much of this is cultural tourism. In Barcelona, it is estimated that around 150 000 jobs in the region depend upon tourism, although at least some of these might be in the informal economy. In the NL it is estimated that 7.5% of jobs depend on this source. In places where tourism is up and coming there might be fewer jobs, but the creation of accommodation and hospitality means a growth in tourist businesses and the hospitality sector. This is mentioned in Israel, PL and in the CZ for example. Many of these businesses might involve family labour. In areas where tourism is less developed, few if any jobs rely on tourism. In industrial areas such as Italy and Austria, tourism contributes relatively few jobs compared with traditional industries.

Furthermore, the kinds of jobs created by tourism are often seasonal, low paid and arduous. They are often performed by women, young people and migrant workers as potential pools of casualised labour or even in the informal economy, thus not contributing to tax revenues (ES and EL). This means that in some places there are not the people available to do them as local people might prefer higher paid and more regular jobs. In some places this can actually inhibit the opening of tourism enterprises, as is the case in the UK and also South Moravia. In SL it was mentioned that in a university city, students might do these jobs and in Greece they were performed by seasonal, often immigrant, workers. Many of the other case studies mentioned that inadequately trained staff was holding back the cultural tourism industry. In Romania it was estimated that each tourist job might generate 1.5 additional jobs indirectly. In many areas businesses closed due to the COVID pandemic, which depressed the supply of jobs. It is not clear that all these businesses will reopen again.

It is possible that cultural tourism, as opposed to other kinds, might raise the skill levels and quality of the jobs available as tour guides and more specialist workers are needed to provide the appropriate information. In many areas these skills and guides were lacking. Many of them had to go out of business at least temporarily on account of the COVID pandemic, although digitalisation offered alternative audiences and platforms (Garrison, Wallace and Chen 2022). The linking of expertise to regions through social media and specialised services such as bloggers and vloggers are a possible way to develop cultural tourism in a post-pandemic world.

3. How cultural tourism has helped to promote tourist flows

Several regions are being promoted by their regional authorities as cultural tourism attractions. In Israel, it was hoped that this would act as a catalyst to attract other kinds of tourists too (Sofer, Shmuel, Amit-Cohen, Tchetichik, Shiff, Yaron, 2022). In some areas the UNESCO designation was important for attracting visitors (NL, SK, ES, RO). In SL this was seen as part of a strategy of sustainable development and in many places, the landscape was being promoted (PL, DE, RO). In some cases the area as a venue for conferences was being promoted (IT) but elsewhere, festivals and events were important for attracting cultural tourists. For EE, cultural tourism was seen as a way of improving the area's reputation, whilst in EL, which already attracted many non-cultural tourists, cultural tourism was seen as an additional attraction. This was also the case in Austria where cultural tourism could be added to the existing tourism for skiing and hiking (Sandreister, Kern and Harfst 2022). In some places cultural tourism was being made part of regional cultural trails and tours (for example Art Nouveau in ES or ethnic heritage in RO). We might also mention wine production and gastronomy as a nexus for tourism through cultural trails within or across borders. In the UK, the importance of popular media such as films and books were an important element of the cultural attraction. Similarly, cultural trails linked the different media sites through for example “Outlander Tourism” or Harry Potter tourism with specialist tour guides and digital media involved (Garrison and Wallace 2021).

Several contributors mentioned the role of social media, trip advisor, bloggers, and vloggers to promote tourist flows.

4. How overtourism has been managed

Over-tourism is associated with seasonal tourism peaks in some places which can lead to alienation of local residents, a degraded tourism experience, overloaded infrastructure, pressures on the natural environment, threats to culture and heritage and repercussions for landscape planning and management (Sarantakou and Terkenli, 2019). For many of our locations (PL, IL, HU, RO, AT, EE) overtourism was not seen as a problem and in fact more tourists would be welcomed. For others such as ES (Barcelona) and NL (Kinderdijk) it is an acute problem. For others such as DE, CZ, UK it is a problem more for certain locations and certain times. For example on the Cyclades, overtourism, in general, is not considered a problem but there can be congestion at peak summer times.

In Greece, over-tourism was managed by limiting the number of ships visiting the Islands, importing water on a seasonal basis and employing seasonal staff. In Barcelona, the conclusion is that it was not well managed and the COVID-19 pandemic allowed a window of opportunity for resetting tourism for the future. In general, it is managed by licensing and limiting the number of Airbnbs – now licences are granted only if old ones have expired. Attempts to manage the ratio of visitors to residents are also included in the city of Barcelona's most recent tourism and economic plans. A proposal for introducing a new museum, the Hermitage, underwent various suggestions for relocation to a more peripheral part of the city under the goal of working toward the decentralisation of tourist attractions, which left investors reluctant to invest in a peripheral area.

In the Netherlands, there were efforts to create a more sustainable type of tourism through using a shuttle service for boats, road transport, bikes, and managing car parking pressures. Timed entry slots were also used. There is a general plan to broaden the experience of the windmill region to include stories about the building of dykes, traditional craft skills and the creation of the landscape.

In other places where overtourism occurred more selectively, there was a plan to tax rentals such as Airbnb in Slovenia and encourage visitors to travel to a wider region around the city through social media and websites. Although over-tourism was not really a problem in Estonia and Italy, partners commented on the

congestion produced by the overlapping of festivals and events. The proposed solution was to better share information about events and spread them out throughout the year.

Several partners mentioned pre-booking and limited entry times (widely used during the COVID pandemic to avoid crowding) as a solution to managing over-tourism (UK). An ingenious solution developed in the Spreewald (DE) endeavoured to redirect tourists from the rural areas where nature and infrastructure were threatened by monitoring use of the internet for various sites and then using this to send tourists elsewhere. Here, as in the Netherlands, better public transport with bikes was also mentioned to avoid traffic congestion.

In general, the encouragement of out of season tourism might also be a better way of spreading the visitors through a longer part of the year.

5. What are the opportunities for cultural tourism to bring visitors to de-industrialised areas?

This was not a relevant question for many of our case study areas because the focus was on the natural environment (HU, DE, IL, CZ, DE). However, a number of places recognised the industrial heritage, even if it was not yet developed (PL, EE, UK, SL, AT, RO). In post-communist countries it was mentioned that the heritage of industries under communism was not seen as positive except in so far as they could help to generate jobs. In other places industrial heritage had been recognised but was only just starting to be developed. An example of this was the case with ship building in one of the islands in the Cyclades, but also in Italy where the industrial heritage features in the new 2020-2021 local plan. In Slovakia, industrial heritage has been recognised as a key resource and two industrial heritage routes have been instated around Nitra to make it attractive for tourists. In the Netherlands, although Kinderdijk was not a de-industrialised area in the classic sense, there has been a renewed interest in ancient crafts such as reed cutting and milling in the area.

However, Barcelona had the most inspiring example of industrial heritage with the conversion of 11 old factories and industrial units into places for artistic endeavours that could involve the local community. One of the most notable was in Sant Andreu. In one such industrial unit on the city's outskirts, there are plans to create a media hub with modern digital industries. The advantage of these developments in more peripheral parts of the city was that they did not pressure tourist services in the over-touristed centre. However, it also meant that some entrepreneurs were reluctant to invest where they were afraid there might be less tourist footfall.

6. How cultural tourism can bring visitors to remote and peripheral areas

One of the attractions of remote and peripheral areas is the nature and environment and this was mentioned by several partners (DE). Many places had plans to improve this through developing cycle and hiking routes (CZ, IL, PL, DE). However, there are common problems of a lack of transport infrastructure and lack of staff with the suitable expertise to service tourists as these areas are sparsely populated (AT, SL). In some places there was a lack of a unique selling point to attract people there (AT). In addition, the lack of infrastructure such as waste disposal, water and road signs etc. could inhibit visitors (RO).

Some partners mentioned that cultural tourism from popular places, such as Barcelona or the Cyclades, tends to spill over into neighbouring cities and the wider region, but can be helped by regional cooperation (IL) or the development of cultural routes to incorporate more peripheral areas (EL, CZ).

Several mentioned the role of festivals and events in getting people out to the rural areas (EE, IT) and social media and digital communications to promote these events/festivals.

It was also mentioned that the COVID-19 lockdowns encouraged local people to explore their regions. In this respect, remote and peripheral areas were particularly popular being seen as less dangerous and crowded. However, this also exacerbated the lack of infrastructure with rural areas being unable to cope with an influx of visitors (UK).

In the UK, Media tourism has attracted people to these areas. Film sets frequently use remote places in Scotland for filming and this tends to exacerbate problems of over tourism in places with little infrastructure. This is particularly the case when there is a sudden and unexpected influx of people due to the popularity of a film or TV series.

7. How cultural tourism has impacted on cross-border issues

Cross border issues were not relevant for the majority of our case studies. Indeed, both Spain and the UK were reliant more on international tourists from UK (in the case of Spain), North America and Germany. In Germany, it was hoped that the attractions of the natural environment together with cycling and hiking might attract tourists from Northern Europe. However, because many of these facilities are underdeveloped, this is unlikely at the moment. Many case studies mentioned that EU sponsored INTERREG programmes were important in stimulating cross-border cooperation, although they also mentioned that this cooperation often tailed off once the programme finished.

In EE the problems produced by the COVID pandemic were further exacerbated by the deteriorating situation between the EU and Russia in the context of the War in Ukraine which meant that cross-border cooperation, on which the tourism hopes were pinned, had declined. The recent COVID pandemic has encouraged the reinforcement of national borders throughout Europe, which has tended to encourage domestic rather than foreign tourism (to be explained below).

In some countries cross-border cooperation was an essential part of the cultural tourism offering. For example in the South Moravian area (CZ) gastronomy and wine growing were important in bringing tourists from Austria. In Hungary cross-border tourism was an essential part of the case study as it was assumed that if people visited one side of the border, they would also visit the other. Here three projects have been identified for cross-border cooperation: the development of the river fortress, the development of regional folklore and the creation of a joint destination management organisation. But at the time of writing (2022) these projects are stalled.

In SK they welcomed the opportunity to attract cross-border tourists, but there is no direct efforts to do so. In Poland the proximity of Lower Silesia to the Czech Republic and Germany has encouraged the idea of cross-border tourism and joining the Schengen zone has greatly facilitated cross-border access. In this region, events were seen as a way of creating cross-border attractions (for example, sporting events or festivals). However, it was pointed out that the regional transport links need to be better developed.

Under conditions of COVID lockdowns, some places turned towards attracting tourists from the nearest countries in the form of “proximity tourism”. This was the case in ES, IT and will be explained below.

8. How the COVID-19 pandemic and subsequent lockdowns has affected cultural tourism

To summarise, the COVID-19 pandemic had the following consequences:

1. COVID regulations resulted in reinforcing national borders because travel outside the country was discouraged and COVID regulations were nationally based and strengthened by law.
2. There was a strong emphasis on safety protocols when venues were allowed to open.
3. Rural areas became more popular over city centres due to lack of crowding.
4. Open air venues became more popular over inside venues.
5. Domestic tourism replaced international tourism, but did not compensate for the numbers of international tourists lost in most places.
6. Cross-border “proximity” tourism became more popular – for example Swiss people going to Italy or French to Barcelona.
7. Individualised accommodation and rentals replaced hotels. There was a resurgence of Airbnb in this respect.
8. Individualised transport replaced mass transport/public transport (e.g. journeys by private car replacing coach travel).
9. Digitisation became more important for bookings, publicity and other more established aspects of tourism as well as accelerating the creation of new applications, such as the use of virtual reality (HU, EE).
10. New kinds of tourism were encouraged or extended (e.g. hiking, cycling and photography tours).

8.1. Coronavirus and cultural tourism

8.1.1. Introduction

This section of the report is drawn from the Special Issue of the Journal of Tourism, Culture and Communications focused upon the impact of COVID-19 on tourism. The Special Issue included papers from all over the world, but many of the partners in the SPOT project contributed to it as well. Whilst in general the pandemic was disastrous for cultural tourism, there were examples of new trends emerging and new styles of tourism, including the increasing role of digital technology. There has been little empirical research carried out due to pandemic restrictions and there has been almost no comparative research about the impact of the pandemic on cultural tourism. The SPOT project, which began shortly before the lockdowns started, was in a unique position to collect this information on a comparative basis.

The coronavirus pandemic has had a devastating impact on the tourist industry. Governments responded from March 2020 with draconian “lockdowns”, although the timing and stringency of these regulations varied from country to country. There were nevertheless similarities in the responses across countries, with face mask wearing compulsory or encouraged, “social distancing” involving leaving a space between people as well as the use of sanitation measures such as hand sanitisers increased cleaning along with avoidance of touching surfaces. Mass events such as festivals, concerts and exhibitions associated with cultural tourism were banned or strictly curtailed. Travelling became very difficult, especially travel abroad.

The academic literature on tourism has not yet caught up with these events because of the time lags involved in publication and because many conferences and meetings (where ideas are normally exchanged and tested) have not taken place. Below we review a selection of the literature in Tourism Journals.

8.1.2. Literature Review

The literature on the impact of COVID-19 is still emerging, since it was difficult to carry out empirical research during the pandemic period. A special issue of *Tourism Geographies* collected a number of articles in 2020, most of them conceptual in nature. The general thrust was that this was an opportunity to reset and change the direction of tourism in more sustainable ways, for example by encouraging Green tourism (Ioannides, Gyimóthy 2020). This rather utopian academic thinking has yet to be proven in practice and it seems that most countries and hospitality providers are simply hoping for a return to pre-COVID days as soon as possible (Liu, Vici et al. 2021). Most governments have tried to prop up the tourism and hospitality industries through financial support, which has been important for the survival of tourism businesses (Salem, Elbaz et al. 2021).

Tourism and hospitality were some of the worst affected industries after governmental responses to the pandemic curtailed international travel and initially even domestic travel was discouraged or forbidden. The hospitality sector, including restaurants and hotels, was forced to close and lay off staff. When they reopened, new hygiene measures were required with tables set further apart, rooms required to air for a day before being reoccupied and additional cleaning carried out after each guest. This required more staff effort at the same time as less visitors were allowed, creating a squeeze on resources. Many of these tourist businesses are small and this caused particular distress as they had few resources on which to draw as the lockdown cut into the tourist season in the spring and early summer of 2020 (Crespí-Cladera, Martín-Oliver et al.) If anyone tested positive for COVID the whole establishment was forced to close whilst staff isolated. For this reason, many went out of business and never re-opened.

The first lockdown in the spring of 2020 was the most draconian and an easing of restrictions took place from May 2020 but still with social distancing, hygienic measures and limits on international travel. After a brief season in 2020, a further lockdown followed in the autumn and winter of 2020-21 as COVID cases spiked once more in the cold weather and following the spread of new variants of the disease (Lilleker, Coman et al. 2021). Whilst lockdowns were eased once more in the summer of 2021, international travel was still difficult, involving extensive and expensive testing regimes, hygienic measures were still in place and this was followed in the winter of 2021 but a third wave of COVID-19, exacerbated by the spread of the highly infectious Omicron variant. However, by this time vaccination programmes were in place with many people in Europe having received up to three vaccinations, which extended to four in Israel.

However, there were important variations across Europe in this respect. Eastern Europe escaped much of the first wave of the pandemic, whilst Spain and Italy were the most affected at that time. However, East-Central European countries were the most badly affected with the second and third waves. Although the vaccination programme should have provided some immunity from COVID-19, there was a simultaneous rise in anti-Vaccine protest, especially in Germany, Austria, Switzerland and East-Central Europe. Even after the EU had approved the use of vaccines, take up was particularly low in East-Central Europe, probably reflecting the lack of trust in Government (Eurofound 2021), and in the long run this is likely to inhibit the recovery of the tourism industry there. This means that those countries are likely to be more vulnerable to more recent and future waves of COVID-19. Research by the European Foundation for the Improvement of Living and Working Conditions suggests that the degree of vaccine hesitancy is related to how much people receive their news from social media (Eurofound 2021).

The result of these stop and start policies was a rise in anxiety in general across the world, accompanied by increasing anxiety about contact with others, especially strangers, in public spaces, which influenced decisions to travel. People were increasingly anxious about flight, other cancellations and claiming reimbursements as well as levels of safety and hygiene at their destinations (Piccinelli, Moro et al. 2021, Qiu, Park et al. 2020). Zenker et al (2020) term this “coronaphobia” (Zenker, Braun et al. 2021). This made people reluctant to travel very far even with the easing of restrictions and changed travel behaviour. Even if they

were able to travel, the effort of testing and getting the right documentation resulted in travel burnout (Yousaf 2021) Social media often inflamed anxieties in addition to providing the fast flow of information (Zheng, Goh et al. 2020) Added to this was increasing xenophobia towards foreigners who were perceived as bringing the threat of disease, especially Chinese people who were mistakenly thought to be carriers (Kock, Nørfelt et al. 2020).

After showing increased growth over several decades, international tourism dwindled away under the restrictions imposed by the pandemic. This had different effects on different world regions. Data collected by the World Tourist Organisation (UNTWO 2021) showed a drop in international tourist arrivals by 73% in 2020 and 76% in 2021. The same source showed that In Europe as a whole, the drop was 69% in both years, with Northern Europe the most affected, showing a drop of 86% and Southern Europe 60%. Countries and regions were affected by how much they relied upon this source of revenue – for example, Macao in China depends upon international tourism for 48% of its GDP. In Spain this is 12%, in Croatia 11% and Montenegro 10%. These countries were among the worst hit in the world.

Although the UNTWO collects data about the general picture of tourism we are still lacking information about what actually happened on the ground. Moreover, there was little information about cultural tourism specifically. Here we can turn to the evidence provided by our SPOT partners.

A few articles suggested new directions for tourism in the future. For example, a renewed appreciation of nature and trail hiking was a possible direction for some as this could be done safely outdoors whilst maintaining social distancing and provide positive mental health benefits (Buckley, Westaway 2020) and a number of people pointed to the importance of a more Green and sustainable tourism in the future (Ioannides, Gyimóthy 2020). Our research suggested some other directions in tourism as we shall see below.

8.1.3. Methods of Research

In each of these case studies, an analysis of policies prior to the coronavirus pandemic and then during the pandemic was carried out along with roundtables and interviews with key stakeholders. In addition, a survey of local businesses, visitors and residents was carried out in the summer of 2020 (in 2021 in Scotland due to lockdown restrictions). Initial publications of some of the results can be found in a special issue of the journal *Sustainability* in 2021 (Garrison, Wallace 2021). Others are available as reports from the SPOT website (SPOTprojecth2020.eu)

8.1.4. Cultural Tourism and COVID in comparison

Cultural tourism is particularly badly affected by these negative tourism trends because cultural institutions are more often found in cities and because they usually involve visits to indoor locations, where visiting was highly restricted. Many cultural monuments closed altogether for longer or shorter periods of time and when they opened, operated a pre-booking system to restrict the number of visitors. This required a certain amount of planning and curtailed the more spontaneous forms of visiting. Cultural tourist attractions such as museums, castles and monuments in Scotland especially missed the American and Canadian visitors who has spent more money and tended to stay for longer periods.

Governments found themselves on the horns of dilemma between locking down to avoid spread of the contagion and wanting to open up to support the economy. The brief advent of “eat out to help out” subsidies in the summer of 2020 for restaurants in the UK suggested the latter direction and in Austria the City of Vienna gave a voucher of €50 per person to spend in restaurants. In Poland a 500PLN voucher per child was distributed to families with children (even though seniors were promised the same, it never materialized) and in Spain young people were given €400 to spend on cultural activities.

By looking at the situation comparatively we can identify some key trends: first, the economic impact in different parts of Europe and how far it was mitigated; second, the focus on domestic tourism and localism; third the increasing importance of nature and rural locations and fourth the enhanced role of digital technology in shaping - and at times replacing - physical travel.

We review each of these trends in turn below.

Varying economic impacts and varying government support

The economic impacts of COVID-19 and measures against it varied a great deal between areas. Areas where tourism had been an important part of the economy suffered the most. Areas which were up-and-coming also suffered but sometimes had alternative industries and businesses, whilst areas which did not much rely on tourism were much less adversely affected, although plans to develop tourism might have been quashed. The kinds of businesses associated with tourism might also be regionally specific. Where tourist businesses were small, family concerns they might be particularly badly affected and unable to carry the losses that perhaps bigger resorts were able to do.

Scotland provides a good example. Scotland relies on tourism for its revenue and employment to a greater extent than other parts of the UK and 2020 was going to bring in a new set of tourist initiatives – until the pandemic stopped all that. Surveys conducted by VisitScotland, the Scottish tourism agency over the pandemic showed that most of the tourist operators were small businesses which were either proprietor run or with less than 10 employees (VisitScotland 2021). Scottish Enterprise, representing local businesses, challenged the Government and pointed to the impracticalities of opening during the COVID climate. One quarter had run out of cash reserves by 2021, 35% reported that the business did worse than expected and 19% of businesses did not reopen during 2021. Most businesses reported a drop in turnover in 2020 compared with 2019 (O. Connor 2021). Businesses in Edinburgh and Glasgow were among the worst affected as people fled the cities and rural providers had the highest numbers of visitors – but also the most limited infrastructure. Three quarters of businesses reduced staff numbers, by putting people on furlough (paid leave) or not employing staff that they normally would and over one third had to make redundancies. According to the VisitScotland Surveys, one quarter of businesses considered selling their business or key assets. However, similar surveys by Highlands and Islands Enterprise in Scotland found that most businesses envisaged continued trading, at a reduced rate. It is clear that the pandemic had a particularly severe impact on small, medium and micro enterprises and that many of these are in the tourism and hospitality industries in rural Scotland (See also Connor, 2021).

All governments in Europe offered business support in the form of loans and support for employment in the form of furloughs (paid leave) or subsidies to business to lay off employees temporarily. Whilst these subsidies were much appreciated by the businesses interviewed in Scotland in 2021, the HIE survey indicated that 60% were not eligible for government support (HIE 2021), so the impact of government subsidies was uneven.

Furthermore, this reduction in capacity meant that when it was possible to open, many businesses were not able to do so. They could not recruit the staff (having laid off people) and these problems were compounded in the UK by Brexit. Many of the temporary seasonal workers in the tourism and catering industries were recruited from Europe, but they now had to apply for work visas following Brexit. Health insurance was expensive for them. The rumours about Brexit along with the feeling of hostility, put these temporary workers off from returning.

In other countries too the economic effects of the pandemic have been detrimental. Israel in particular relies on international tourism and these numbers have declined dramatically (Sofer, Shmuel, Amit-Cohen, Tchetichik, Shiff, Yaron, 2022). Greece is still suffering economic fragility after the 2008 financial crisis and its

aftermath and relies greatly on tourism to balance its economy (Terkenli, Vasiliki 2022). In other countries where tourism was not so developed (Estonia, Romania, Slovakia) the pandemic quashed plans to expand cultural tourism (Kramáreková, Petrikovičová, Krogmann, Grežo, 2022).

In most countries governments introduced plans to support the employment of workers to stop them losing their jobs, although these took different forms in different places and support for tourism businesses. In wealthier European countries these took the form of national strategies generously supported, whilst poorer countries, particularly those in East-Central Europe, looked towards the EU Resilience and Recovery Plan or other EU redistributive support through Regional Development aid and the Cohesion policies. While the partners in Romania, Greece, Italy, Hungary, Slovakia, Poland, Estonia and Slovenia all mentioned this EU funding as essential, partners in Spain, the UK, the Netherlands, and Germany did not (Bishop Pareja-Eastaway, Solsona 2022). This probably reflects the generous support measures that were already in place at a national level. Other countries mentioned turning to World Bank loans - this was the case in Romania. Some areas, such as Barcelona offered assistance to tour guides and performers to tide them over (Bishop, Pareja-Eastaway, Solsona 2022). Many countries used the mechanism of lowering or abolishing Value Added Tax paid at the point of purchase, for hospitality services.

Therefore although the pandemic had a detrimental effect on tourism numbers and businesses, many of these were cushioned by government economic assistance, to the extent that was unprecedented in peace times. Whilst the EU recovery programme was slower to get off the ground, this assistance marked a major redistribution of funds from wealthier to poorer countries within the EU and so Greece and East-Central Europe turned to these sources when their own governments were in not such a good position to support them. This had unexpectedly positive economic effects, as we shall see later. In Poland the disbursement of these funds was held up by EU objections to Government policies.

The increasing demand for domestic tourism

The lockdowns encouraged more domestic travel. However, domestic visitors are also more likely to be day trippers and to spend less than international ones. Nevertheless, partners in the SPOT team reported that the number of nights stayed by domestic visitors increased during the pandemic, because there was nowhere else to go. A number of countries made attracting domestic tourism part of their policy. In Lower Silesia businesses recorded more overnight stays than in previous tourist seasons, especially in agritourism accommodation. Most of these were domestic visitors. In both Hungary and Slovenia, the nationalist governments prioritised national tourists and developed cultural facilities to encourage national pride or educate people about their history. In Slovenia this took the form of opening Museum on the Independence of Slovenia from the Former Yugoslavia, even though there was already a museum devoted to Slovenian history.

In Barcelona there was a call to develop “proximity tourism” (which included visitors from neighbouring France) (Bishop, Pareja-Eastaway, Solsona 2022) and in the Netherlands this went under the slogan “You should be here”. Alternatives for people such as photography courses and river cruises were developed. In the Czech Republic alternative holidays involving self-catering and car driving were encouraged with a “holidays in the Czech Republic” policy (Št’astná, Vaishar, Tuzová, 2022). In Slovakia it was observed that 79% of holidays involved travelling round Slovakia (Kramáreková, Petrikovičová, Krogmann, Grežo, 2022) and in Scotland 80% of holiday makers were UK nationals (in contrast to the 50/50 split with international visitors recorded previously) (O’Connor 2021). In Romania, the slogan “Tourist in my country” was promoted. In Germany, most of the tourism is domestic anyway, but here the number of domestic tourists increased by an estimated 40% as Germans found it more difficult to go abroad. In Poland, a tourism voucher of 500 PLN was issued to citizens and their children to encourage domestic use of hospitality facilities.

The lockdowns encouraged a sense of community self-help (Wallace et al. forthcoming) but also exacerbated a process of “othering” whereby strangers, including visitors were not welcome and became a source of anxiety or xenophobiaⁱ. In many rural tourist areas in Scotland, the influx of visitors from elsewhere in the UK was treated with hostility because they were seen as potentially overloading the limited rural healthcare facilities. They were also treated with antipathy because of apparent bad behaviour in the form of partying, littering and defecating in public places (this was mainly because public toilet facilities were closed)ⁱⁱ. “Wild camping” increased with problems of littering and trespassing. The wave of what were seen as barbarian invasions from urban areas bringing disease reversed the usual welcome extended to visitors. We could term this “anti-tourism”. In Scotland this occasionally took the form of anti-English sentiments as the number of English visitors increased and at one point the Isle of Skye was closed to visitors because they felt there were too many visitors and the local facilities could not copeⁱⁱⁱ.

Once lockdown restrictions started to be relaxed for the first time in summer 2020, new forms of recreation started to emerge. Unable to travel abroad, people opted for “staycations” in their own country – that is they might opt to stay at home and just do day trips or to have a holiday in their own country. However, hotels and catering establishments had restricted capacity due to the new hygiene rules and many cultural monuments and venues remained closed or introduced a pre-booking system to restrict numbers. This meant that even domestic facilities that were available could not meet the increased demand. Holiday travellers were pushed towards campsites and campervans and domestic bookings on UK campsites rose by 300% even as international travel fell and demand for campervans and caravans rose by 209% (from campsites.co.uk cited in *The Independent* 24.02.21). This kind of self-catering accommodations was also considered safer by visitors.

Airbnb, a digital platform in the sharing economy whereby people can rent out spare rooms and other accommodation, was significantly hit by a 72% drop in bookings from March – April 2020. However, after that bookings recovered as Airbnb offered the opportunity for self-catering accommodation and long term lets in the countryside (Forbes 2021, Krouk and Almeida 2020). The popularity of the countryside rose as people were able to work remotely and avoid COVID hotspots in cities so that Airbnb bookings for “glamping” and self-catering accommodation overtook conventional hotels (Bresciani et al 2020). The Northcoast 500 route in Scotland, a motoring route round the Highlands, became particularly popular for campers, camper vans and mobile homes, putting further pressure on narrow, crowded roads with limited facilities – even under normal conditions.

Hence, whilst international visitors declined, there was an increasing tendency to holiday nearer home and this was even encouraged by government campaigns to boost tourism safely. Therefore, although there was still a drop in tourist numbers, it was perhaps not as drastic as it could have been.

The role of nature and rural locations

Throughout Europe tourism in cities fell but tourism to rural areas became more popular. Rural areas were seen as more remote and easier to isolate oneself from others. Many people descended on beauty spots, leading to resentment by local populations and the idea of localism became more prevalent (Brouder 2020) People forced to stay at home started exploring their locality and the natural environment around them. This resulted in new forms of leisure or the reinvigoration of more traditional forms that could be pursued safely in the countryside. For example in the UK “wild swimming” in seas and lakes took off. The attraction of nature trails and hiking all over Europe became more evident (Buckley, Westaway 2020). In Nitra, Slovakia, the aim was to reconstruct tourism after the pandemic by offering holidays in nature, based on these trends. This was helped by the fact that the COVID restrictions were less strong for outdoor than for indoor venues, meaning more people could meet in safety.

Some places deliberately marketed themselves to attract the “digital nomads” for whom home working was now normal. Barcelona for example offered medical insurance, culture passes, gym membership to attract these people (Sigala 2020). One of the reasons that Airbnb was successful is that it could offer these kinds of remote self catering accommodation. In the UK and Austria this resulted in property prices in urban areas declining, but rising in rural areas as people sought to escape from the urban areas now that they could continue to work from home (Sandreister, Kern and Harfst 2022).

Therefore, tourism moved out of the cities and into the countryside, using more individualised and self-contained forms of transport and accommodation. There was a new interest in leisure pursuits that could be carried out safely out of doors. This leads us to suggest that “cultural tourism” should also be seen as a rural and not just an urban phenomenon based upon the built environment.

Digital technology and tourism

The pandemic rapidly accelerated the use of digital technologies (Kaczmarek, Perez et al. 2021). Work moved more online and people became used to using Zoom or equivalent platforms for their work. They had to learn new digital skills which could also be turned to leisure pursuits. Online booking systems were introduced into many cultural tourism attractions to manage visitor numbers. QR codes were used to track and trace methodologies and of course for vaccination certification but QR codes were also used increasingly to provide information about locations. COVID vaccination, testing and Green Pass certificates could be stored on mobile phones and increasingly became compulsory in many countries.

Consequently, new forms of digital tourism became more accessible, including what became known as e-tourism (Gretzel, Fuchs et al. 2020) Even Wine Tasting could be carried out as a virtual tour under COVID conditions (Wen, Leung 2021) and Wine Tasting events could be a source of revenue for unemployed tour guides using one of the communications platforms such as Zoom or Teams, among others. Jarratt (2020) has documented the use of camcorders as people viewed their favourite holiday destinations or other places such as zoos that they could no longer visit (Jarratt 2020).

The use of podcasts and videos became widespread and were used by deliberately by sections of the tourist industries, such as the Caledonian MacBrain ferry services in Scotland, to sustain interest in visiting the Islands once conditions improved. VisitScotland used the idea of “Dream Now, Travel Later” to keep Scottish destinations “top of mind”. Cultural installations, such as art galleries revamped their websites to include cultural tours and lectures (Itani, Hollebeek 2021).

Most of the SPOT partners mentioned a renewed emphasis on digitalisation in tourism as part of the national or regional strategies and the COVID pandemic has accelerated this trend. Surveys of visitors in the SPOT project showed that increasingly people visit destinations virtually ahead of going there themselves (or instead of going there) and manage their trips through various booking platforms such as Booking.com or TripAdvisor (Garrison, Wallace and Chen 2022). These rapidly became the main source of information about places as people roamed their online worlds during lockdown and other sources of information were unavailable.

8.1.5. Conclusions

Therefore whilst tourism declined during the coronavirus pandemic in Europe, it did not disappear. Instead, people turned to domestic tourism, at times encouraged by government campaigns, and explored new forms of tourism through digital pathways or by discovering places closer to home. The role of nature and the countryside achieved greater prominence, although whether this will lead to the “Green recovery” that the EU and the more utopian writers in *Tourism Geographies* would like to think, remains to be seen. For rural areas, „green“ can mean a more attractive landscape environment, which might be reassuring for visitors.

For more industrial areas, green is less important and the focus is more on jobs and economic survival (Sandreister, Kern and Harfst 2022).

Contrary to economic forecasts at the beginning of the pandemic, there was no world wide global recession. Rather, there has been an economic boom with high rates of growth in some countries. Pent-up demand from people who were unable to spend their money on holidays or cultural events during the lockdown periods means that cultural tourism is set to take off again. However, these economic effects are uneven and the COVID pandemic has exposed widespread inequalities between those who were better off by working from home in secure jobs and those who were in more insecure labour market sectors where this was not possible.

The economic measures to maintain employment and businesses provided a cushion through the pandemic period (to those able to take advantage of it). When visitors return, the problem now appears to be that many of the tourist businesses will no longer be operating and will find themselves short of staff. This will likely push people even more towards the individualised forms of accommodation and transport, making some destinations more feasible than others.

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1. ⁱ **Scottish villagers 'smothered by visitors' plea for help from Nicola Sturgeon**

A Highland community is being “swamped” by campervans and campers, its bus firm has claimed.

The Scotsman Sunday, 9th August 2020, 1:23 pm

ⁱⁱ The Herald 24th July 2020 “Villages around the NC500 are 'being ruined by litter and vandalism’”

ⁱⁱⁱ **Stay the f**k away': Convoy of Scottish nationalists attempt 'blockade' on English border The Scotsman Saturday 4th July 2020**