Tourismus Management

# Passport

Das Magazin der Fakultät für Tourismus

Ausgabe 1/2021

Neuaufbruch

HM





# INHALT




English version of this article available for iOS and Android on our app “Tourismus Management Passport”

## Impressum:

**Herausgeber:** Prof. Dr. Felix Kolbeck, Fakultät für Tourismus, Hochschule München, Schachenmeierstraße 35, 80636 München **Internet:** www.tourismus.hm.edu V.i.S.d.P.: Prof. Dr. Felix Kolbeck **Redaktion:** Kerstin Mesch **ISSN:** 1866-3044 **Verlag:** vmm wirtschaftsverlag gmbh & co. kg, Kleine Grottenau 1, 86150 Augsburg, www.vmm-wirtschaftsverlag.de **Media- und Objektleitung:** Hans Peter Engel, Telefon: 0821 4405-420, hanspeter.engel@vmm-wirtschaftsverlag.de **Titelbild:** Bihlmayer Fotografie/adobe.stock.com **Bilder:** Hochschule München **Bilder Regionenspecial:** Tourismusverband Tannheimer Tal **Grafik:** Birgit Hradetzky, Anne Gierlich **Bildbearbeitung:** Adnan Badnjevic **Lektorat:** Kerstin Jäger **Druck:** AZ Druck und Datentechnik GmbH, Kempten **Anzeigen:** Derzeit ist die Anzeigenpreisliste 2021 gültig. Der Inhalt dieses Heftes wurde sorgfältig erarbeitet. Für die Inhalte sind ausschließlich die Autoren verantwortlich. Herausgeber, Redaktion und Verlag übernehmen für die Richtigkeit der Angaben sowie für eventuelle Druckfehler keine Haftung. Alle in PASSPORT abgedruckten Beiträge sind urheberrechtlich geschützt. Nachdruck oder anderweitige Verwendung sind nur mit vorheriger Genehmigung des Herausgebers gestattet.

# (Im)mobilities during and after the COVID-19 pandemic

## The changing face of tourism after corona

VR tourism would unquestionably have the advantage of also reducing the carbon footprint of a journey to zero.

Lightfield Studios/ stock.adobe.com

Deutsche Fassung
in der App verfügbar

Viral mobility has forced us to come to a standstill during the COVID-19 pandemic. With hectic lifestyles and frantic days now a thing of the past, we find ourselves in the quiet confines of immobility. Mobility used to be a synonym for freedom, leisure and tourism. Mobility was a right which each person enjoyed. Now it has become – by force of circumstance – a sign of irresponsibility, at times even recklessness.[1]

1 cf. Cresswell 2020; Scuttari 2020; Scuttari et al. 2021

Anna Scuttari

After the outbreak of the COVID-19 pandemic, the mobility space of people and goods suddenly shrank and it has continually (almost schizophrenically) changed since then to further minimise the risk of infection. The global spatial reaches of viral mobility and the speed at which the SARS-CoV-2 virus has spread, as well as the incidence of the virus at a local level are all part and parcel of the parameters defining the COVID-19-triggered travel warnings, restrictions on movement and regularly updated lists of risk areas. At the same time this has seen other forms of mobility taking on new significance – above all the mobility of information and digital mobility. Despite the pandemic, synchronous and asynchronous teaching, webinars, online conferences and digital examinations, for example, have been held under exceptional conditions by replacing physical mobility with the exchange of digital information.

This article reflects on the mobilities (and immobilities) of people, goods, information and viruses during and after the COVID-19 pandemic. The aim is to identify which changes in the mobilities and which new relationships (and/or additional factors or substitution effects) may arise which can have a lasting effect on the tourism industry.

## Mobility(ies)

It is in this context that the concept of "mobilities" can be helpful in initiating an interdisciplinary discussion on the phenomenon of mobility during and after the COVID-19 pandemic. The well-known sociologists John Richard Urry and Mimi Sheller together with the geographer Tim Cresswell are the founders of the "mobilities studies": a new paradigm for the interpretation of mobility and the social sciences in the 21st century.[2] Since the middle of the noughties, "mobilities studies" have centred on a new interpretation of mobility which looks more at the social and political significance of movement than at just the physical movement of individuals and goods.[3] In his book "Mobilities" [4], Urry argues that "movement, potential movement and blocked movement are all conceptualized as constitutive of economic, social and political relations."[5] The development of the COVID-19 pandemic has laid bare the social and political importance of physical mobility. Sanctions and compulsory measures (e.g. closing borders) can be described not only as non-pharmaceutical interventions (NPIs) introduced to contain the virus but also as political tools which limit the financial and trading capacities of the countries affected[6] and may later also give rise to geopolitical fears[7]. Moreover, these measures may have a lasting/negative impact on the international mobility of people.

In order to shed light on these new meanings of mobility, five forms of mobility were identified in the "mobilities studies": of people, of goods, of information, of ideas and lastly of virtual content. Virus mobility was not initially considered but even before the COVID-19 pandemic, it was examined – in the Routledge Handbook of Mobilities – as a possible level of mobility research.[8] Mobility is a central characteristic of viruses, since to survive, viruses have to be mobile. In addition to the mobilities at a local level, "between bodies, regional and global mobilities are also key to the success of a virus." [9] This has given rise to a sort of "prioritisation" and "pathologisation" of individual forms of mobility and at the same time has led to tourism being perceived as partly responsible for the pandemic.

## Tourist mobility in the COVID-19 era

Tourism has developed in symbiosis with people's mobility.[10] Being able to reach a destination was and still is today instrumental in developing the tourist industry. This symbiosis between tourism and personal mobility also means, however, that tourism (or its mobility) quickly became the carrier of the SARS-CoV-2 disease. It is actually known that some destinations, including cruise ships (e.g. the Westerdam, the Ruby Princess and the World Dream), but also ski resorts (e.g. Ischgl), proved to be hotspots at the onset of the pandemic.[11] This has resulted in a pathologisation of tourist mobility and in the necessary COVID-19-induced travel warnings, restrictions on movement and in monitoring the risk areas. In May 2020, for example, travel restrictions were announced for 75% of the world's travel destinations.[12]

But tourism has not only played its part in compounding the pandemic; it is also a victim of it[13], with international tourist arrivals falling worldwide by 72% between January and October 2020 and by 68% in Europe.[14] The UNWTO panel experts expect an upswing in international tourism in the third quarter of 2021 and a return to the pre-pandemic levels not before 2023.[15] The fresh start should thus be seen as a slow process. This gradual recovery after the COVID-19 pandemic can be interpreted as the consequence of the disruptive change in mobility behaviour during the pandemic. The distances travelled have been decreasing dramatically for months now, domestic tourists have become an increasingly important factor and the number of foreign guests has fallen. This has seen a change in the guest structure for the tourist destinations worldwide, which in turn has, of course, meant changes in the tourist product. Outdoor activities and sustainable individual forms of transport (e.g. bicycles) have been used more often in a number of destinations than was the case before.[16]It is to be expected that the use of public transport will have fallen and will continue to decline even further, to date, however, this not yet being a subject of discussion in the international specialist literature.

To create the best possible conditions to preserve tourism, tourist destinations have tried to uncouple viral and tourist mobilities from each other. This has mainly taken the form of instituting measures to protect holidaymakers and personnel, including Perspex partitions at reception desks, social distance markings on floors, hand-sanitiser dispensers, increasing the cleaning intervals and reducing the occupancy of public spaces. Additionally, mobility of information has assumed a major role in preserving tourism: together with the classic factors influencing the travel decision, which include tourist products/characteristics of the destination and perceptions/feelings of the guests[17], the transmission of information during the pandemic about any new developments concerning the occurrence of infection has gained in importance. Information management and communication will shape and help determine the reputation and image of the destinations in post-COVID-19 tourism, for transparent distribution of information and facts about the infection situation will bring with it a reduction in the psychological stress holidaymakers feel.[18] Even during the pandemic, customer relationship management has become a lever for the recovery of the destinations.

2 cf. Ebert 2015
3 cf. Scuttari 2019b
4 cf. Urry 2007
5 cf. Urry 2007, p. 43
6 cf. Seyfi et al. 2020
7 cf. Mostafanezhad et al. 2020
8 cf. Lavau 2014
9 cf. Cresswell 2020, p. 1
10 cf. Prideaux 2000
11 cf. Iaquinto 2020
12 cf. UNWTO 2020a.
13 cf. Gössling et al. 2020
14 cf. UNWTO 2020b
15 cf. UNWTO 2020c
16 cf. Weed 2020
17 cf. Seddighi/Theocharous 2002
18 cf. Namikawa et al.2008

How can mobility again become a synonym for freedom, leisure and tourism?

Photobank/ stock.adobe.com

**Physical and virtual mobilities: substitution effects?**

Uncoupling viral and tourist mobility has also come about through the use of several digital technologies. These technologies include systems for touch-free and contactless services (e.g. robots, remote check-in-check-out processes, mobile contactless payments) and also digitalised experiences (e.g. virtual reality, augmented reality, mixed reality).[19] Virtual tourist offerings were known even prior to the COVID-19 upheaval – some of them already being on the market[20] – but customers were somewhat unwilling to take up such offers. So-called social distancing and the desire to go on holiday have now seen an increase in the demand for virtual offerings, such as sightseeing tours of towns and cities, visits to museums and tastings,[21] whereas before the COVID-19

pandemic, VR was primarily regarded as a marketing tool for advertising and communication purposes.[22] So how will virtual mobility evolve after the pandemic? Will these virtual offerings be used to incentivise us to go on physical journeys?

Even if more virtual tourism offers are taken up by customers, there is a need to develop and establish new business models in the industry. The bedrock of virtual tourism is not, for example, establishments providing accommodation but to a large extent is the attractions, such as museums, historic monuments and churches. Virtual tourism can whisk you to the Sistine Chapel and allow you to climb to the top of the Eiffel Tower in just half a day – without staying overnight, without making any return travel arrangements and without discovering the destination. The "wandering around" that is so much part of travelling, discovering places by chance and getting a feel for the local culture would be lost. But at the same time VR tourism would unquestionably have the advantage of also reducing the carbon footprint of a journey to zero. Numerous virtual tours are being offered during the COVID-19 pandemic. A notable example is lockdownstories.travel,[23] a research project which has conceived and offers virtual tours to six favelas in Rio de Janeiro in order to integrate the local population into the tourist development scheme even while the pandemic era holds sway.

Equally worth mentioning are the online portals and OTAs working actively with online experiences, such as online discoveries of Airbnb which can already be seen on the website,[24] or trips recommended by Booking.com, which integrate VR as a tool for planning a journey.[25] Virtual tours have the potential to complement, to enhance or even to replace analogue tours. The long-term substitution effects are still unknown, however.

19 cf. Sigala 2020
20 cf. e.g. www.virtualhelsinki.fi/
21 cf. Itani/Hollebeek 2021
22 cf. Beck et al. 2019
23 http://lockdownstories.travel
24 https://de.airbnb.com/s/experiences/online?_set_bev_on_new_domain=1587390825_YzczZDExZTcxN2Zm
25 www.booking.com/articles/virtual-reality-tours-to-transform-your-travel.html

## Conclusion

Viral mobility has brought us to a standstill. After one year of the pandemic, it is still not known to what extent this trauma will leave scars on humankind (and tourism). Who will travel to other countries when it is again (seamlessly) possible? And with what purchasing power? How will the severely impacted tourism sectors (e.g. cruise-ship tourism) regain their prestige? How can mobility again become a synonym for freedom, leisure and tourism?

The question as to how mobilities will develop after the COVID-19 pandemic primarily depends on what happens with the rate of infections and the speed at which vaccination programmes can be rolled out – but not solely on those. Resilience research[26] shows that crisis resilience – which comprises the ability to resist, to adapt and to transform – heavily depends on the intensity and duration of a crisis situation and on the (geographic) scale of the crisis. Where crises are long, severe and multi-scaled, a long-term recovery plan needs to be formulated. Strategic management at the destination and corporate level in concert with the public subsidies and measures to reduce the vulnerability of the tourist industry will play a key role in the fresh start. Crucial factors here will be to identify the market segments with high profitability and low susceptibility to infection risks, to maintain and grow the existing customer portfolios, to integrate technological innovations with a view to cutting the operating costs, and to develop partnerships and alliances. The fresh start will be a learning process. The crisis – from the Greek κρίνω – gives us the opportunity to decide on the way forward.

26 cf. Lew 2014


**Literature**

Beck, J., Rainoldi, M., Egger, R. 2019: Virtual reality in tourism: a state-of-the-art review. Tourism Review, 74 (3), 586-612.

Cresswell, T. (2020): Valuing mobility in a post COVID-19 world. Mobilities. https://doi.org/10.1080/17450101.2020.1863550

Ebert, A. K. (2015): Mobilität(en) - ein neues Paradigma für die Verkehrsgeschichte?. N.T.M. 23, 87-107. https://doi.org/10.1007/s00048-015-0129-9

Gössling, S., Scott, D., Hall, C. M. 2020: Pandemics, Tourism and Global Change: A Rapid Assessment of COVID-19. Journal of Sustainable Tourism. https://doi.org/10.1080/09669582.2020.1758708

Iaquinto, B. L. (2020): Tourist as vector: Viral mobilities of CO- VID-19. Dialogues in Human Geo- graphy, 10(2), 174-177. https://doi.org/10.1177/2043820620934250

Itani, O. S., Hollebeek, L. D. (2021): Light at the end of the tunnel: Visitors' virtual reality (versus in-person) attraction site tour-related behavioral intentions during and post-COVID-19. Tourism Management, 84. https://10.1016/j.tourman.2021.104290

Lavau, S. (2014): Viruses. In: Adey, P., Bissell, D., Hannam, K., Merriman, P., Sheller, M. (eds): The Routledge Handbook of Mobilities. Oxon: Routledge, 298-305.

Lew, A. A. (2014): Scale, change and resilience in community tourism planning. Tourism Geographies, 16(1), 14-22.

Mostafanezhad, M., Cheer, J. M., Sin, L. S. (2020): Geopolitical anxieties of tourism: (Im)mobilities of the COVID-19 pandemic. Dialogues in Human Geography, 10(2), 182-186. https://doi.org/10.1177/2043820620934206

Namikawa, K., Kikuchi, H., Kato, S., Takizawa, Y., Konta, A., Lida, T., Kimura, M.(2008):Knowledge, attitudes, and practices of Japanese travelers towards malaria prevention during overseas travel. Travel Med. Infect. Dis.,6,137-141.

Prideaux,B.(2000):The role of the transport system in destination development. Tourism Management, 21(1),53-63.

Scuttari,A.(2019a): Cycling and motorcycling tourism. Springer International.

Scuttari, A. (2019b): Tourism mobility: challenges and transformations. In: Pechlaner, H. (eds): Destination und Lebensraum. Entrepreneurial Management und Standortentwicklung (Perspektiven für Unternehmen und Destinationen). Springer Gabler, Wiesbaden. https://doi.org/10.1007/978-3-658-28110-6_12

Scuttari, A. (2020): Le mobilita del virus, delle persone e dei bit. Una riflessione sul turismo e oltre. Eurac Science Blog Covid-19 and beyond, 22.4.2020, retrieved on 19.2.2021: https://beta.eurac.edu/en/blogs/covid-19/le-mobilita-del-virus-delle-persone-e-dei-bit-una-riflessione- sul-turismo-e-oltre Scuttari, A., Ferraretto, V., Stawinoga, A. (2021): Tourist and viral mobilities intertwined: interactions and mutual influences of corporeal and communicative travel in South Tyrol (IT). Submitted paper.

Seddighi, H. R., Theocarus, A. L. (2002): A model of tourism destination choice: a theoretical and empirical analysis. Tm Management, 23(5), 475-487, https://doi.org/10.1016/S0261-5177(02)00012-2

Seyfi, S., Hall, C. M., Shaba- ni, B. (2020): COVID-19 and international travel restrictions: the geopolitics of health and tourism, Tourism Geographies. DOI: 10.1080/14616688.2020.1833972

Sheller, M., Urry, J. (2006): The new mobilities paradigm. Environment and Planning A, 38(2), 207-226.

Sigala, M. (2020): Tourism and COVID-19: Impacts and implications for advancing and resetting industry and research. Journal of Business Research, 117, 312-321.

UNWTO (2020a): World Tourism Barometer. Volume 18, (7), December 2020. Retrieved at: https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.7

UNWTO (2020b): COVID-19 Related Travel Restrictions - A Global Review for Tourism was developed by the World Tourism Organization's (UNWTO). Retrieved at: https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-09/200909-travel-restrictions.pdf

UNWTO (2020c): Impact assessment of the COVID 19 outbreak on international tourism, Updated 27 May 2020. https://www.unwto.org/impact-assessment-of-the-COVID-19-outbreakon-international-tourism

Urry, J. (2007): Mobilities (Reprinted.). Cambridge, Malden, MA: Polity Press.

Weed, M. (2020):The role of the interface of sport and tourism in the response to theCOVID-19 pandemic, Journal of Sport & Tourism, 24:2, 79-92. DOI: 10.1080/14775085.2020.179435118 Issue 01|2021 Tourism Management Passport

# Between Destination Recovery and Destination Resilience

## Challenges for a responsible tourism policy in Bavaria

Deutsche Fassung in der App verfügbar

Given the immediate and huge shock for the international leisure and tourism industry, the COVID-19 pandemic has triggered an unprecedented crisis impacting all segments of the tourism value-added chain – be they tour operators, the hotel and restaurant trade, art and cultural institutions, event agencies, artists, tourist guides and many more.

So what's the next step? Is there even a next step? For many stakeholders in tourism, the pandemic has led to a veritable existential crisis.

Halfpoint/stock.adobe.com

Markus Pillmayer

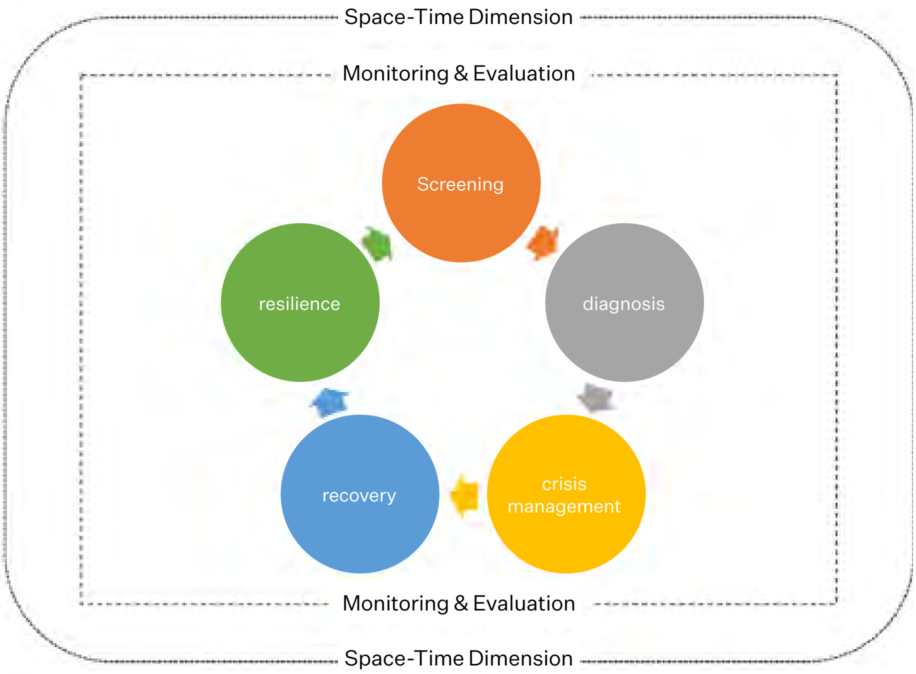
According to estimates of the OECD, the reverberations of the pandemic resulted in international tourism falling by 80% in 2020. Travel destinations heavily reliant on incoming tourism and MICE are still very much struggling, as are urban destinations. Encouraging news about a range of vaccinations may be giving cause for hope but for the time being there persist regional differences and the concomitant challenges. It may also be assumed that the first signs of international tourism recovering will be within certain geographical regions (e.g. in the European Union).[1]

The German Federal Government's Centre of Excellence for Tourism arrives at a similar assessment in its third Recovery Check, in particular in terms of the travel market in Germany: the latest version of this scenario

1 www.oecd.org/coronavirus/policy-responses/rebuilding-tourism-for-the-future-covid-19-policy-responses-and-recovery-bced9859/ [03.01.2021]

## “Character shows in a crisis.”

Helmut Schmidt (1918-2015), former Chancellor of the German Federal Republic in 1962 on the occasion of the storm surge on the German North Sea coast




Illustr. 1: crisis management model

Source: own illustration

analysis expects domestic tourism to recover far more quickly and strongly than international tourism.[2] However, it needs to be said that this is just a snapshot. In December 2020, the second lockdown was imposed across Germany until 10 January. It has been extended several times and at this point in time (22.02.2021), it is set to last until 7 March 2021. It is not yet possible at this juncture to predict the full ramifications of these lockdowns for the German leisure and tourism industry. Although the German destinations with a Destination Recovery in mind have set about putting together a multitude of measures, given the various laws, rules, regulations etc., – and a lockdown as the last resort – these cannot be implemented to the desired and required extent.

### Destination Recovery and Destination Resilience as the building blocks of successful crisis management

Recovery, according to Scott, Laws and Prideaux[3], “…mean[s] a change to the pre-existing ways of operating. The standard means of measuring recovery by the success of an organisation in restoring business flows to an earlier trend line may not be adequate because this benchmark does not take into account the adaptation that may take place during the crisis and ensuing recovery.” The leisure and tourism industry is extremely susceptible to numerous events, such as natural disasters, epidemics, terrorism, uprisings and the like. For this reason, the stakeholders[4]need to be well prepared as far as countermeasures and coping strategies are concerned.[5]Managing crises and disasters is crucial in order to reduce the impacts, to get a handle on coping and to improve the recovery time at both the organisational and the destination levels. Pure crisis management that sees itself merely as a reaction to an event is inadequate if knowledge of and skills in how to deal with and to recover from crises and the attendant recovery process are to be gained.[6]Illustration 1 contextualises the necessary individual phases to be followed as a crisis unfolds.[7]

Closely connected with this are fundamental questions which are of pivotal importance for the destination system per se:[8]

- How do stakeholders actually deal with crisis events?
- Were the stakeholders surprised out of the blue?
- How long will or can the tourism system exist in its known form without any changes?
- Are the stakeholders sensitive to disruptions and changes?
- In which ways are stakeholders responsive to external and internal influences?
- To what extent do characteristic features vary as time progresses
- Are there geographical differences?
- Can the original state be restored and if so, in which form and in what time frame?
- Which resources are needed in this case?

Resilience research put its energies into these and similar questions. As a rule, neither DMOs nor stake holders have a blueprint or a standard procedure for their crises but simply pursue their own individual goals and needs, which, however, and against the backdrop of the complexity of a situation, they often don’t know how to deal with adequately.[9] Strategic decisions are taken almost exclusively according to the situation in such cases.[10] By way of contrast, regional differences, interpretative approaches and schools of thought – depending on the scientific discipline – are important

2 www.kompetenzzentrum-tourismus.de/wissen/insights/388-recovery-check-3-die-vitalisierung-des-tourismus-hat-begonnen [15.12.2020]
3 Scott et al. 2008: 2

4 The stakeholders of a destination comprise multiple groups that play a part in the tourist ecosystem and pursue certain interests (restaurants, establishments providing accommodation, tourist information centres, cycle hire businesses, museums, inhabitants, guests).
5 Muskat et al. 2014: 7 ff., Pillmayer/Scherle 2018: 5 ff.
6 Rittichainuwata et al. 2020, Prayag 2018: 133
7 With the limited scope, it is not possible to look at the individual phases in greater detail here; this piece therefore confines itself to the two phases Recovery and Resilience.
8 Hall et al. 2018: 1

9 Grimm/Calabrese2011
10 Barbe/Pennington-Gray 2018, Liu et al. 2016

factors in resilience research: the field of psychology sees resilience as an individual process of adaptation enabling a person to deal with difficulties and to overcome adversities.[11]In the regional sciences it is "… the abilities of regions to process exogenous shocks and to maintain economic viability"[12]. In a social-ecological context, which closely follows the current sustainability discourse, resilience means "… the capacity of a system to absorb disturbance and reorganise while undergoing change so as to retain essentially the same function, structure, identity and feedbacks that existed before the disturbance began"[13]. Since resilience documents the process of adapting to incremental changes, an in-depth analysis can provide illuminating insights in this context. Resilience concepts can – according to Pillmayer and Scherle – be deployed in a range of contexts (history, culture, economic development etc.), in various time phases (before, during and after a crisis), and at numerous places and in various standards.[14] The decisive factor in particular – in addition to the willingness of the stakeholders to reflect on resilience in terms of a Destination Resilience – is the role of tourism policy, which sets and shapes the underlying conditions and can make a vital contribution to a Destination Recovery.[15] This is especially true for the tourism state of Bavaria.

## Tourism policy in Bavaria

In keeping with the tourism policy concept of the Bavarian state government,[16] the leisure and tourism industry in Bavaria is regarded as a key economic sector. It serves to convey the state's identity and is of crucial importance as a job and economic factor, image carrier and a cross-sectoral industry with a multitude of cultural and social interdependencies. There are, for instance, some 600,000 jobs in this key industry which cannot be relocated abroad and are therefore deemed to be relatively crisis-proof.[17] By way of comparison, the BMW Group has only 133,778 employees worldwide.[18] Bavaria is one the foremost year-round destinations in Europe and is regarded as the number 1 tourism state in Germany. It is of the essence that this competitive position be consolidated and to this end it requires concerted efforts by all the tourism actors to ensure that Bavarian tourism continues to remain at a high level. In addition to the organisation BAYERN TOURISMUS Marketing GmbH (BayTM), the official state marketing arm of the Bavarian tourism and leisure industry, six principle members and 22 other members from the diverse sectors of the Bavarian leisure and tourist industry are among the stalwarts of this thriving economy. Many actors contribute to the full range of offerings and profit from the demand for trips, leisure and relaxation. The tourist product offered locally or in a region always consists of several elements, which ideally should neatly dovetail to form an intrinsic whole. Tourism within a destination, however, is only successful as a coordinated interplay of public investment and the private service providers. It is in this context, therefore, that tourism policy at the Land level has a key role to play. Ideally, it should formulate a mission statement for tourism and destination development, for example, and pinpoint specific fields of activity as well as proposed measures for implementation. With its policy and strategy documents, the state government lays out for the industry the economic, structure-determining and societal importance which it ultimately deserves.[19] In Bavaria, six members of the Land parliament currently act as spokespersons for tourism policy. They are involved in different ways and to a greater or lesser extent through various activities (e.g. questions, motions, bills etc.) in the dialogue on tourism policy (cf. Table 1).

By being democratically elected, tourism politicians are given a mandate by the electorate to devise policies which they must then see through for the purposes of legitimacy. It is in the current COVID-19 pandemic in particular that there is an even greater onus on them to see themselves as advocates of their sector and to articulate themselves to the best of their abilities. The most important communication tool in this respect is their own website.[20]

## Bavarian tourism policy at the crossroads

According to projections of the DWIF (German Economic Institute for Tourism)[21], the fall in turnover anticipated in Bavaria due to the COVID-19 pandemic runs to the tune of 7.6 billion euros for the months of March, April and May 2020 – without the costs for travelling to and from the destinations and the necessary advance payments. Each additional week of the lockdown will mean a drop in turnover in the leisure and tourism industry in the Free State of Bavaria of some 580 million euros. On account of the majority of very small and small businesses and because of their poor financial strength, a high rate of business failures and lay-offs can be expected in the industry. The consequences for the job market cannot be reliably estimated yet at this point in time. It is especially in the current exceptional situation brought about by the COVID-19 pandemic that the Bavarian tourism policymakers and both the tourism policy spokespersons and the working party on tourism of the CSU parliamentary party must face up to the question as to whether they are living up to their high-profile role, considering that the leisure and tourism industry is a major economic factor, and which specific measures and initiatives they have taken to actively support it – vis-à-vis a

11 Rolfe 2018: 42
12 Wink 2010: 111
13 Walker et al. 2004: 6
14 Pillmayer/Scherle 2018
15 Bellini et al. 2017, Cheer/Lew 2020, Cooper 2018
16 Bayerisches Staatsministerium für Wirtschaft, Infrastruktur, Verkehr und Technologie 2010: 3
17 Bayerisches Staatsministerium für Wirtschaft, Landesentwicklung und Energie 2020: 11
18 www.bmwgroup.com/de/verantwortung/mitarbeiter.html [12.12.2020]

19 Schulz et al. 2020
20 Simtion 2016: 256
21 https://tourismus.bayern/dwif-corona-kompass/ [04.01.2021]

**Table 1: Spokespersons on tourism policy of the Bavarian parliamentary parties (As at: December 2020**

| Name, party affiliation and home page (in alphabetical order) | Tourism policy activities (non-exhaustive*) | Activities relating to COVID-19 and the leisure and tourism industry (non-exhaustive*) |
|---|---|---|
| Bergmüller, Franz<br>AfD<br>**www.franzbergmueller.de/** | • creating awareness to maintain village economies in the association "Pro Tourismuskampagne"<br>• streamlining tourism structures and checking efficiency<br>• enacting a Bavarian tourism and restaurant law<br>• scrapping the radio licence fee and lowering the "GEMA" (Performing Rights Society) fees<br>• reducing the VAT rate for the hotel and restaurant trade to create a level competitive playing field at home and abroad | The AfD is calling for lifting the ban forcing the hospitality industry, fitness businesses, art and culture to close until 11 January |
| Duin, Albert<br>FDP<br>**www.albert-duin.de/** | • none directly linked to the leisure and tourism industry | none evident |
| Eibl, Manfred<br>Freie Wähler<br>**www.manfred-eibl.de/** | • none directly linked to the leisure and tourism industry | Freie-Wähler parliamentary party wants to permanently lower restaurant VAT to 7% |
| Fehlner, Martina<br>SPD<br>**www.martina-fehlner.de/** | • none directly linked to the leisure and tourism industry | Bavarian SPD parliamentary party is calling for support programmes for the arts and culture sector to be implemented as swiftly as possible |
| Stöttner, Klaus<br>CSU<br>**www.klaus-stoettner.de/** | • working to improve the basic situation<br>• drawing up a clear strategy for further developing and growing the industry in concert with the most important tourism actors<br>• streamlining organisational structures and the financing issues involved<br>• enhancing the quality<br>• president of the organisation Tourismus Oberbayern München e.V. (TOM) | Support for promotion of the arts from the cultural fund |
| Zwanziger, Christian<br>Bündnis 90/Die Grünen<br>**www.christian-zwanziger.de/** | • question concerning Center Parcs in the Franconian Lake District – questions about the plans for the former Muna site<br>• emergency motion on the solo self-employed scheme<br>• question regarding the scientific rationale for the closing time for restaurants and pubs<br>• question about monitoring and ongoing review of necessary restrictions in the tourism industry on the basis of health protection<br>• question regarding Regional and Tourism Development High-tech Agenda and High-tech Agenda plus | Funding scheme motion "Maintaining restaurants, strengthening rural regions" |

* A complete overview of the political activities can be found on the website of the particular spokesperson.

Source: own illustration

Destination Recovery and a Destination Resilience. It is the case, namely, that the sector is not only systemically important but also especially important for people's very way of life. Initiatives evidencing little knowledge of the industry and giving more the impression of unbridled politicking must therefore be firmly rejected. The remark made by the Bavarian state premier Dr. Markus Söder, MdL (CSU): "I would sooner we had a unified agreement at the European level: no ski lifts open everywhere or rather no holiday everywhere"[22] must in view of its proportionality and the responsibility for a major economic sector be discussed in particular by the tourism policy actors. The challenges in this context are not posed primarily by the funicular railways nor by any other stakeholders with functioning HFS[23]rules to stop the spread of infection but by day trippers by virtue of their individual and at times questionable behaviour. Moreover, a Europe-wide ski strategy has failed to materialise to date because of Austria's obdurate stance.[24] The latest body blow is the state premier cancelling the Bavarian carnival holidays – without any political debate beforehand in the Bavarian state parliament but instead afterwards –, which would have provided more than a badly needed fillip for the leisure and tourism industry.[25] It is likewise debatable if pragmatism without adequate and necessary reflection can be the right strategy when facing a pandemic. Angela Inselkammer, President of the Bavarian German Hotels and Restaurants Association DEHOGA, for instance, just recently called for restrictions to be eased for the restaurant trade provided that restaurant guests had been vaccinated: if "... all have had the jab, why not?. I would take a relatively pragmatic approach here."[26]

The impacts of the COVID-19 pandemic can be observed in the entire tourist ecosystem, and access to and reopening of destinations around the world will require concerted efforts. Stakeholders and their employees may be benefitting from interim financial assistance; in the meantime, measures to support the leisure and tourist industry have also been introduced. These measure are unquestionably important but there does need to be a coordinated approach. Only if all the players involved in Bavarian tourism – the elected representatives responsible for tourism policy, the representatives of the destinations, the tourist businesses and, last but not least, tourism science – enter into an ongoing dialogue and consult with each other closely, will it be possible to navigate the leisure and tourism industry through this crisis. Professional interest-driven politics in terms of successful tourism lobbying[27] is today more than ever a sine qua non. The action taken today will shape and determine the tourism of tomorrow and this is precisely why both governments and individual members of parliament must immediately take into consideration the longer-term implications of the crisis. It is essential to actively map out the transformation process needed for establishing a stronger, more sustainable and thereby resilient leisure and tourism industry.[28] The crisis is – to allude to the quote by Helmut Schmidt used at the beginning – a chance to rethink tourism for the future, and this is the judgemental yardstick which the Bavarian tourism policy and in particular the tourism policy spokespersons will be answerable to.

## Approved research project

The Bavarian Ministry of Economic Affairs, Regional Development and Energy is funding a research project with a six-figure sum for three years on "COVID-19 and the Bavarian tourist industry – crisis management, resilience factors and recommendations for action". The project leaders are Prof. Dr. Markus Pillmayer and Prof. Dr. Celine Chang, both of whom have proven expertise in this field. The main thrust of this approved project is to devise specific tools for crisis management and fostering resilience for the Bavarian leisure and tourist industry. This makes the research project one of the first of its kind in the German tourism research landscape and underlines the relevancy the Department of Tourism wishes to achieve as an acknowledged interface for the transfer between tourism science and tourism practice.

There will be regular reports here on the status of the research project.

22 www.fvw.de/destination/news/skisaison-in-gefahr-soeder-ist-fuer-europaweite-schliessung-von-skigebieten-213596 [12.12.2020]
23 Wash your Hands, cover your Face, make Space
24 www.focus.de/politik/ausland/ischgl-2-ist-vorprogrammiert-fassungslosigkeit-nach-ansturm-auf-oesi-skipisten_id_12814174.html [30.12.2020]
25 www.focus.de/familie/eltern/bayern-soeder-sagt-wegen-pandemie-faschingsferien-ab_id_12840590.html [06.01.2021]
26 www.sueddeutsche.de/politik/coronavirus-impfung-sonderrechte-1.5160935 [30.12.2020]

27 Pillmayer/Scherle 2014
28 Brouder 2020, Ioannides/Gyimothy 2020

**Literature**


Barbe, Danielle; Pennington-Gray, Lori (2018): Using situational crisis communication theory to understand Orlando hotels' Twitter response to three crises in the summer of 2016, in: Journal of Ho- spitality and Tourism Insights, 1(39), pp. 258-275.

Bayerisches Staatsministerium für Wirtschaft, Infrastruktur, Verkehr und Technologie (2010): Tourismuspolitisches Konzept der Bayerischen Staatsregierung. München.

Bayerisches Staatsministerium für Wirtschaft, Landesentwicklung und Energie (2020): Tourismus in Bayern. Daten - Fakten - Zahlen 2020. München.

Bellini, Nicola; Grillo, Francesco; Lazzeri, Giulia; Pasquinelli, Cecilia (2017): Tourism and regional economic resilience from a policy per- spective: lessons from smart specialization strategies in Europe, in: European Planning Studies, 25(1), pp. 140-153.

Brouder, Patrick (2020): Reset redux: possible evolutionary path- ways towards the transformation of tourism in a COVID-19 world, in: Tourism Geographies, 22(3), pp. 484-490.

Cheer, Joseph M.; Lew, Alan A. (2020): Understand tourism resilience: adapting to social, political, and economic change, in: Cheer, Joseph M.; Lew, Alan A. (ed.), Tourism, Resilience and Sustainability: Adapting to Social, Political and Economic Change. London: Routledge, pp. 3-17.

Cooper, Chris (2018): Challenging tourism contexts for planning and policy: revitalising failing destinations, in: Andriotis, Konstan- tinos; Stylidis, Dimitrios; Weidenfeld, Adi (ed.), Tourism Policy and Planning Implementation: Issues and Challenges (= Contem- porary Geographies of Leisure, Tourism and Mobility). London: Routledge, pp. 80-95.

Grimm, Volker; Calabrese, Justin M. (2011): What is resilience? A short introduction, in: Deffuant, Guillaume; Gilbert, Nigel (ed.), Viability and Resilience of Complex Systems Concepts, Methods and Case Studies from Ecology and Society. Berlin & Heidelberg: Springer, pp. 3-13.

Hall, Colin Michael; Prayag, Girish; Amore, Alberto (2018): Tourism and Resilience. Individual, Organisational and Destination Per- spectives. Bristol: Channel View Publications.

Ioannides, Dimitri; Gyimothy, Szilvia (2020): The COVID-19 crisis as an opportunity for escaping the unsustainable global tourism path, in: Tourism Geographies, 22(3), pp. 624-632.

Liu, Bingjie; Pennington-Gray, Lori; Krieger, Janice (2016): Tourism crisis management: Can the Extended Parallel Process Model be used to understand crisis responses in the cruise industry?, in: Tourism Management, 55, pp. 310-321.

Muskat, Birgit; Nakanishi, Hitomi; Blackman, Deborah Ann (2014): Integrating Tourism into Disaster Recovery Management, in: Ritchie, Brent W.; Campiranon, Kom (ed.), Tourism Crisis and Disaster Management in Asia-Pacific. Wallingford: CABI, pp. 97-115.

Pillmayer, Markus; Scherle, Nicolai (2018): Krisen und Krisenmanagement im Tourismus - Eine konzeptionelle Einführung, in: Hahn, Silke; Neuss, Zeljka (ed.), Krisenkommunikation in Tourismusorganisationen. Grundlagen, Praxis, Perspektiven. Wiesbaden: Springer VS, pp. 3-18.

Pillmayer, Markus; Scherle, Nicolai (2014): Tourism Lobbying in Bavaria: Between Ignorance, Parochialism and Opportunism, in: European Planning Studies, 22(8), pp. 1671-1692.

Prayag, Girish (2018): Symbiotic relationship or not? Understanding resilience and crisis management in tourism, in: Tourism Management Perspectives, 25, pp. 133-135.

Rittichainuwat, Bongkosh; Laws, Eric; Maunchontham, Rengson; Rattanaphinanchai, Suphaporn; Muttamara, Sanvicha; Mouton, Kris; Lin, Yueling; Suksai, Chanatip (2020): Resilience to crises of Thai MICE stakeholders: A longitudinal study of the destination image of Thailand as a MICE destination, in: Tourism Management Perspectives, doi: 10.1016/j.tmp.2020.100704.

Rolfe, Mirjam (2018): Positive Psychologie und organisationale Re- silienz: Stürmische Zeiten besser meistern. Wiesbaden: Springer.

Schulz, Axel; Eisenstein, Bernd; Gardini, Marco A.; Kirstges, Tors- ten H., Berg, Waldemar (2020): Grundlagen des Tourismus. Berlin: Walter de Gruyter.

Scott, Noel; Laws, Eric; Prideaux, Bruce (2008): Tourism Crises and Marketing Recovery Strategies, in: Journal of Travel & Tourism Marketing, 23(2), pp. 1-13.

Simtion, Alexandra (2016): Strategische Stakeholder-Ansprache: Eine Fallstudie zur BtB-Kundenkommunikation auf Messen. Wies- baden: Springer.

Walker, Brian; Holling, Crawford S.; Carpenter, Stephen R.; Kinzig, Ann (2004): Resilience, adaptability and transformability in so- cial-ecological systems, in: Ecology and Society, 9(2):5. [online] URL: http://www.ecologyandsociety.org/vol9/iss2/art5.

Wink, Rüdiger (2010): Evolution regionaler Resilienz: theoretischer Rahmen und Messkonzepte, in: Dreger, Christian; Kosfeld, Reinhold; Türck, Matthias (ed.), Empirische Regionalforschung heute: Festschrift für Professor Hans-Friedrich Eckey. Wiesbaden: Springer, pp. 111-126. Suchst Du einen coolen Job in Hospitality Tech? Anzeige Eal#s ßihrsncl© DiMnh IJ: C -1 T ITJCCTJ Stirtt mit uns dlurähS Toedt, Dr. Selk & Coll. GmbH Augustenstr. 79 / 80333 München P: +49.89.1893569 0 / info@dailypoint.net

# So what's next after short-time work?

## The corona crisis as a job crisis in tourism

Compared with other sectors, tourism has been particularly hard hit by the current crisis. Short-time work, job insecurity, the threat of insolvencies and redundancies worry both employers and employees. This article looks at the consequences of the pandemic for employers and employees and ventures an outlook for the tourism job market and working in tourism after short-time work and the pandemic. Various actors in the tourism field have given their assessments of the prospects.

Sabine Bösl, Celine Chang

The corona crisis has hit the employers and employees in the tourism industry hard. Legal measures such as travel restrictions, stay-at-home orders, closing borders and social distancing are directly impacting on tourist activities too. The hospitality industry in Germany, for example, posted for 2020 approximately 40% less turnover than 2019 (Federal Statistical Office 2021a). Global air traffic is estimated to have fallen by as much as 70% compared with 2019 (Statista 2021a). These developments pose major challenges for the industry's employers, for without tourists there are no revenues but the costs continue. This is especially hard on the staff in tourist businesses when one considers that salaries are one of the biggest cost pools in many such organisations. Fewer journeys, hotels, restaurants and pubs closed, and events cancelled mean there is hardly any work for many of the staff to do. A large number of them are currently at home worrying about their future. The situation is similar for trainees as well or for graduates with degrees in tourism who had been counting on a secure job in the sector.

### The consequences: short-time work, insecure employment and job cuts

An important labour-market policy instrument in Germany during phases of economic crisis is the short-time worker's supplement. This enables companies to temporarily reduce their personnel costs, avoid lay-offs and to keep workers and skilled staff (Konle-Seidl 2020).

This supplement can only make up for a part of the employee's loss of income, however (at least 60% and 67% for parents). This means that low-wage staff are feeling the pinch to a much greater extent in this current crisis. Due to tourist businesses being classified under different branches, no detailed information is available on how many staff in the tourist industry are actually affected by short-time work at the present time. The largest proportion of employees in tourism work in the restaurant and accommodation sector (BMWi 2017), where short-time work was reported for some 95% of those liable to social security contributions in April 2020 (DEHOGA 2020). In addition, there is a large number of employees who cannot claim the short-time-work supplement because they work part-time doing very few hours, for example, or are self-employed or unpaid family workers. Moreover, it is often the case that only employees with open-ended employment contracts benefit from the regulations governing short-time work (European Commission 2010). There is widespread use of fixed-term contracts in the tourism industry, however, due to seasonal employment.

But receiving short-time benefit cannot safeguard jobs for which there are no long-term employment prospects (Konle-Seidl 2020). The "BDL" (German Aviation Association), for instance, says that air traffic might not reach the pre-crisis level again until 2024 (BDL 2020). The situation has already seen Lufthansa cut some 30,000 jobs around the world (Koenen 2020). There is a similar scenario playing out at the world's biggest tourism group TUI, with the company planning to shed some 8,000 jobs worldwide (Schlautmann 2020). Both corporate groups have promised their staff in Germany protection against unfair dismissal until the end of 2021 (Lufthansa Group 2020; TUI Group 2020). In addition, there have already been numerous terminations of employment in the hotel and restaurant trade too: in October 2020 and seasonally adjusted, there were some 90,000 fewer employees liable to social security contributions than in February 2020 (Statista 2021b).

In spite of the curbs on economic activity, a wave of businesses becoming insolvent has so far not materialised.

Insolvencies in fact fell in 2020 (Federal Statistical Office 2021b). However, with the obligation to file for insolvency having been suspended, it is unclear how many tourist businesses are actually insolvent at the moment and will make their staff redundant in the future (IAB 2020). The first signs of firms in the hospitality industry closing have recently been emerging, however, with the well-known Grandhotel Hessischer Hof in Frankfurt and the Anna Hotel & Restaurant in Munich announcing they are closing their establishments because of the consequences of the pandemic.

The state support measures which can still prevent lay-offs are for a limited period, however. Entitlement to claim the short-time work supplement is also set to come to an end on 31.12.2021. It is doubtful whether tourism will have completely recovered by then. It would therefore seem to be even more important to take a look into the future in order to gauge the long-term consequences for the tourism labour market.

### Outlook: so what's next after short-time work?

It is very difficult to make specific predictions about how the tourism labour market will develop since they depend on a range of determinants, starting with the further development of the pandemic, the regulations which then follow, but also, for example, the geographical location of the service providers, the customer and guest structure, the business strategy and the particular sub-sector.

It is, thus, not yet possible to forecast a speedy end to the crisis for those firms in the hospitality sector reliant on international air travel or on events and trade fairs (Weber 2020). Leisure tourism in Germany or Europe, however, is likely to recover more quickly (Stauß 2020; Strasdas et al. 2020).

Operators who own their premises are in a better position than those that have the financial obligations which come with rent or lease arrangements. Additional financial burdens make it more difficult to weather the crisis or even to invest in the future, and that means in staff as well. It is mainly small, often owner-managed businesses that are to be found in the tourism industry. Despite less financial power, there is the hope with these firms that it is in their own self-interest they remain a going concern. For it is also the owner structure and the legal form in conjunction with the anticipated returns that can decide the continuation of companies and hence the security of jobs.

The crisis has shown businesses that a lot of work, such as meetings with customers, events or further training courses, can also be done no matter where you might happen to be. In a survey carried out by the VDR, Germany's business travel association, 85% of the firms questioned in December 2020, for instance, think they are "very likely" or "more likely" to look more carefully at the necessity of business trips in the future (VDR 2020). The corona crisis is in parts thus already seen as having a transformative character (Hutter/Weber 2020). This will change the nature of the work done in tourism in the future, for example in new business segments or with a keener focus on digitalisation.

With the great diversity of employers in tourism, it is not possible to forecast in the various sub-sectors any universally acknowledged consequences of the corona pandemic for the job market. This being the case, we are letting various actors in tourism have their say on the following pages so that an overall picture emerges of what the industry's employers and employees are in for.

A number of basic assumptions may be made, however: it may be presumed that the market will see consolidation

It is very difficult to make specific predictions about how the tourism labour market will develop since they depend on a range of determinants.

Andrey Popov/panthermedia

(Stauß 2020; Strasdas et al. 2020). There will be more insolvencies and redundancies. The number of employees leaving their job of their own volition will increase and there will be even more people moving into other sectors. The employers who were well positioned before the pandemic, with regard to their HR management as well, will successfully ride the crisis. This also involves, and especially at this moment in time, staff-oriented leadership, needs-driven (crisis) communication and appreciative staff management. But this may also mean letting employees go and then winning them back again when tourism returns, and keeping in touch until then. It is especially in tourism that staff live for providing services, being the host, in other words: interacting with people. Having to stay at home in these times is, thus, difficult for many of them.

Employers in tourism will generally continue trying to keep their staff in their company, however. The glaring shortage of skilled manpower in tourism even before the pandemic (e.g. Chang/Eberhardt 2020) will not be gone when business picks up again. The outflow of labour to other parts of the economy will continue to be a particular problem. Consolidation in the market might mean there will be more tourist specialists on the job market again but it must be presumed that this phenomenon will be but ephemeral.

In order to gain reliable insights into these aspects and to be able to make specific recommendations, more research needs to be carried out too. The research project under way since 2021 "COVID-19 and the Bavarian tourist industry – crisis management, resilience factors and recommendations for action" headed by Markus Pillmayer and Celine Chang and set to run at the department for the next three years, explicitly integrates the employer and employee perspectives.

## Recommendations for employers

What can employers do in the current situation to continue to get their staff through the crisis in good shape?

For employees in tourism, the insecurity which many people in general feel because of the corona crisis includes their own jobs as well. In order to address the employees' concerns, it is important to maintain close contact with them. Direct contact especially suffers in phases of short-time work or where employees are working from home. In addition to the classic forms of communication, such as e-mail, telephone and WhatsApp, there are numerous creative ideas to help prevent an information and communications vacuum. Those who don't have the luxury of their own staff app can take advantage of digital formats with video-conferencing or videos. These even make it possible to organise celebrations and events, for which staff can be equipped with goodie bags beforehand. Christmas parties were held in many places via Skype, Zoom and co., for example, and employers sent staff mulled wine and snacks by post for the festivities. Other formats can also be used at an institutional level to help colleagues keep in touch with each other, for instance. At a "mystery lunch" the employer draws lots to choose staff who arrange to have lunch together online (Engelhardt 2020). In this way, various (occasionally also unknown) colleagues can meet regularly and this also gives them the chance to talk about similar problems with each other.

Being able to communicate with the employer at the same time strengthens the employees' trust and confidence, for in these challenging times, it is particularly important for staff to know that their company is doing what it can for their well-being despite the difficult economic situation. Companies may not be able to make any reliable predictions in many cases about how business (and the situation of the staff) will develop, but employers should signal that they are taking all the necessary measures to safeguard jobs.

It is also becoming increasingly evident that retaining employees is proving to be more important than ever in order to counteract the risk of staff changing to another sector. It is not only the employer who benefits from further training programmes designed to develop the job and/or personal skills of the staff. These programmes also contribute to employee satisfaction, increase their commitment to the company and are a meaningful pursuit not only in times of short-time work. The further training programmes can be selected according to the employees' individual development goals, for instance, or to the type of skills the company needs now or in the future. At this point, and in view of the demands placed on employees, it is advisable to examine whether the corona crisis should go hand in hand with changes for one's own company (e.g. changed guest/customer structure, growing significance of aspects such as digitalisation and sustainability). In this context, training senior personnel in "Leadership in the Crisis" and "Digital Leadership" may also be expedient. Such further training measures can be organised in collaboration with other (tourist) businesses. This would also reduce the cost of holding courses and workshops.

To end on a note of hope: due to the great emotional involvement of those affected, crises also offer the chance to share intense experiences (Schein 2018). Furthermore, something meaningful can be gained from depressing situations. Individual people can rise to the challenges, for example, or entire teams be strengthened in their team spirit. Employers and executives should exploit the chances to emphasise the point and the purpose and the prospects for the future so that employees can summon up the strength to continue to weather the pandemic.

# Voices from practice

## On the impact of the corona pandemic on employers and employees

The order of the contributions is based purely on space and layout considerations.

### Kerstin Winkelmann, Head of Human Relations, Motel One

**What does HR management mean in these corona times?**
"Corona has moved the role of HR management even further to the centre of the company. Where we were mainly concerned with recruiting and talent management before corona, we now find ourselves dealing with a wide variety of structural and organisational tasks: internal communication, managing short-time work, advising management and the hotel managers, and strategic organisational development. And in future? In 2021 it's important to map out the course for the successful fresh start of our hotels. What will working life look like after corona and what will the teams need? Further developing our online campus with onboarding programmes and leadership and talent development as well as implementing new digital HR tools are right at the top of the HR agenda. I see 'New Work' in the hotel business as a great chance for us because corona has brought and will bring a lasting change to our working world. And I have set myself the goal of breaking up 'old' working structures and devising new working models so that we in our sector can become more attractive again for the employees. You see, whether before corona, during or after corona, the employee is the focus of our HR work."

**We've got a shutdown again at the moment so the staff are at home. What are the demands on leadership in** these times?
"The culture we live at Motel One has always been characterised by very frank, transparent and swift communication on an equal footing with our teams. The crisis shows us that we will resolutely continue down this path to keep our employees on board. They long for the dialogue with their teams, for information on the current situation of the company and for regular updates. There's no denying that leadership from a distance is not always easy and takes time. But if we show understanding for the individual situation of each and every employee in these exceptional times, then that is the basis for a trusting working relationship. Everyone experiences the time in lockdown differently and has different challenges and issues which become important. I see the leadership teams having a feel for these issues and addressing them as being essential because only then will we succeed in guiding our employees through these difficult times and in giving them hope and security."

**To what extent is there the risk of losing staff to other lines of business? How are you trying to prevent this?**
"That employees in the hospitality industry have been actively poached by other sectors such as the retail trade is not a new phenomenon. It's been going on for years now. What is new are the large-scale recruiting campaigns of some of the discount stores focussing clearly on the employees in our industry. These and other companies too are understandably exploiting the plight in our sector to recruit manpower for themselves and to offer jobs without short-time work. In the short term, there is direct added value for the employees in switching to another sector in that they can plan how to get out of working reduced hours. How long this poaching will continue and if such employees will be happy there as well beyond corona remains to be seen and also depends very much on what sort of working environment the new employers provide – AND what working conditions and opportunities we can offer our staff. We are engaging in an active dialogue with our employees and talking frankly about the prospects. The hotel business and especially Motel One was a highly successful sector before corona and I'm looking very optimistically into the future. The staff need to know there are real opportunities and realistic chances. We can offer them this over the long term too. I mean, in which other industry have you got these multi-faceted and quick career and development possibilities?"

Deutsche Fassung in der App verfügbar

## Prof. Armin Brysch, Vice-President Travel Industry Club

**Tourism has been hit really hard by the corona pandemic. How are the employers in tourism coping with it?**
"Very differently! The heterogeneous nature of this cross-sector industry is reflected in the very different ways businesses are impacted. Following a phase of short-time work and other restrictions, a number of firms have unfortunately slipped into insolvency, which has resulted in all the staff being made redundant. What's more, many companies which are still severely to existentially constrained by persistent losses in turnover are trying to retain employees in various employment models. A small proportion of them, primarily firms operating online and offering services such as online advice and online training, can maintain the staffing levels or even increase them slightly."

**What is your assessment of the impacts of the corona pandemic on the attractiveness of a job in tourism for employees?**
"Just as different with light and shadows. Through structural changes brought about by the pandemic and by travellers' changes in behaviour – so we're talking about 'more domestic holidays', 'sustainable and mindful travel' and also 'digital solutions for business travel' –, many segments of the tourism industry will flourish again and in 2 to 3 years might see themselves enjoying the pre-2021 successes and level, and even surpass these for many years to come. Jobs will be created in the industry again and qualified personnel who have studied tourism management, for example, are much in demand. But some tourism activities will fall by the wayside forever so jobs will be lost there too or employees will find a new field in modified (digitalised) solutions."

**What recommendations do you have for employers in tourism for their HR management so that they can successfully get through the crisis?**
"Where possible, employers should exploit the chances given by targeted upskilling and digitalisation. The Travel Industry Club launched a new programme for this purpose last year aimed at supporting young talents in the industry. The TIC's Young Mind Talent Programme 2020 is, thus, a positive sign that promoting talent is vital for the future of tourism in times of crisis as well (more information at: https://travelindustryclub.de/). Talents from various segments of the industry have devised solutions together in three workshops spread over the year and covering personality development, new work and digitalisation as well as agile working methods. A repeat is planned for 2021."

## Jochen Szech, President of asr Allianz selbständiger Reiseunternehmen – Bundesverband e.V.

**What impacts does the corona pandemic have on the medium-sized travel companies as employers?**
"The global corona pandemic will mean significant adverse effects for the medium-sized tourism employers in the short, medium and long term. The owner-managed tour operators and travel agencies are posting declines in turnover in the last ten months of over 85% on average. Nearly all employers were therefore forced out of economic necessity to reduce the working time of their staff by 80 to 100%. The time would have been more meaningfully used for further training, product development and customer care, but it was financially simply not feasible to bring back the staff from short-time work and to pay them. So in the short term what's missing in most of the businesses is the necessary structures for a swift and successful fresh start when tourists start travelling at home and abroad again.

The travel industry has lost some of its attraction in the medium term due to the pandemic because although the pay for jobs in tourism was seen as below average till now, the job itself was regarded as attractive and crisis-proof in view of the decades of growth in the sector. Corona and climate change have given rise to considerable doubts about this security, and with it about the employees' professional prospects, especially as an ever bigger question mark is being put on holiday trips by both politicians and society itself, and holidays are even being stigmatised in some cases.

In the long term, the current lack of political support for trainees in tourism and for students on degree courses in tourism will further exacerbate the skills shortage in the industry. Internet price comparison companies such as Check24, which on the one hand goes for quantity instead of quality, but on the other hand can compensate for the loss of the tourist market through other business segments, will benefit just as much from this development as, say, the Lufthansa Group, which will step up its expansion in classic mid-sized operator markets with the help of billions of euros of taxpayers' money and all to the detriment of medium-sized businesses and employers."

**Can this development still be stopped or even partly reversed?**
"Yes, if the tourism sector takes a critical look at itself and all the players realise that tourism has to become more sustainable and deliver higher quality. In the final analysis , this is the only way we can pay competitive salaries when we are competing with other lines of business. The industry itself has to put an end to flogging off cheap holidays as mass-produced goods à la Check24. What the decision-makers in the sector really have to do now is to get that across to the medium-sized businesses and also to communicate the new value of travelling to the customers."

**Susanne Droux, Executive Director of Vocational Training/Sector Promotion, Bayerischer Hotel- und Gaststättenverband DEHOGA Bayern e.V.**

**What concerns and worries do the employers have who contact the DEHOGA in Bavaria?**
"Since the beginning of what for tourism and its key players, the hotel and restaurant trade, is a pandemic of truly existential proportions, the business owners have contacted the Bavarian branch of the German Hotels and Restaurants Association, DEHOGA, about the following matters and in the following order. In the first shutdown, the major concerns were the complex short-time worker's supplement, the emergency aid, business interruption insurance, the proper way to shut down a hotel and the whole complex of liquidity and credit facilities, meaning maintaining liquidity.

In the spring of 2020, however, with outside dining being allowed, the DEHOGA together with the Health Ministry drew up hygiene measures for restaurants, hotels, takeaways, beer gardens, events, wellness areas, clubs and school canteens. Based on the understanding 'as little as possible, as much as necessary' and together with Walter Nussel, Member of the Landtag and commissioner of the Bavarian State Government for reducing red tape, these measures were trialled and published as guidelines with explanatory videos. In addition, the DEHOGA in Bavaria set up in collaboration with the Bavarian digital minister Judith Gerlach 'Darfichrein.de' ('MayIcomein.de') for registering guests via a QR code. It's a tool which the local health authorities now also use for contact tracing.

The summer of 2020 saw high levels of domestic tourism, which on the one hand almost managed to make up for the lost months in rural regions in particular, but the large cities were unfortunately hardly able to benefit from this domestic boom. There were also numerous court rulings at this time which suspended bans on offering accommodation and wellness services or on closing times, or tenancy and lease agreements were brought into line, something which was initiated by the industry.

The second shutdown in the autumn of 2020 and the loss of the strong Christmas trade hit the hospitality businesses and their staff very hard. Businesses realised from the previous year, you see, that that it was highly unlikely they would be able to reopen before the spring. So from November 2020, the November and December aid, deferring contributions and taxes and also the financial bridging assistance arranged by the DEHOGA with the trade associations and the suspension of the obligation to file for insolvency were crucial."

**How does the association support businesses in coping with the crisis?**
"The key factors for us in this crisis have been close communication and the firms being able to reach the right people at DEHOGA in Bavaria whenever they felt the need, ranging from the president and the regional manager through to the legal and business managers. We also set up teams of specialists within DEHOGA who have the latest expert knowledge on the corona regulations, which are frequently revised on a daily basis. To support the firms, these teams have prepared checklists, information leaflets, FAQs, notices and downloadable information signs for mandatory masks or social distancing regulations. These signs with the DEHOGA Bavaria logo can be seen in all the hospitality sector businesses and also everywhere else in the whole of Bavaria and have created a sense of community too, which has given the sector additional emotional support. The meanwhile more than 250 newsletters and 150 web pages each day have notched up 2 million visitors, 3 million previews and 1.3 million downloads.

Liaising with politicians and the ministries has also been of signal importance in order to decide on and often modify processes for the sector to ensure they will work in practice. One stimulus measure we got through, for example, was not least the reduction in VAT on meals as well to 7%, which demonstrably secured the survival of the smaller hospitality businesses in particular.

But also with a pool of ideas to draw on and cool campaigns, such as the radio station BAYERN 3's marketing campaign 'Local heroes – save your favourite restaurant!' for takeaways and delivery service, the gastro-initiative Bavaria 2020 for establishing a second economic mainstay and the campaigns 'Bavarian love of life? You bet', 'Festivities at Home', 'Hotels and restaurants: the doors must stay open!' or the spectacular summer highlight 'The week of Bavarian beer-garden music with LaBrassBanda', the Bavarian branch of DEHOGA has given its nigh on 40,000 firms solid guidance and motivation."

**Emotions and trust**
"But the most important thing in any crisis, along with the financial aspect, is to maintain trust and emotional strength. That's why the 'DEHOGA Bavaria Helpline' was set up too so that proprietors can get their worries off their chest in the evenings. Following a similar pattern, the blow to staff was cushioned with the campaign 'Helping hands – Bavarian proprietors help clinics' to support the pool of care workers during the shutdown. And last but not least, exam training videos provided by DEHOGA Bavaria helped the trainees to pass their final exams. An extremely emotional and busy year lies behind and ahead of us, a year which above all in the second shutdown after closing for nearly 9 months in some cases, has threatened the very existence of many businesses. But it is precisely in these times that the DEHOGA Bavaria will stand by its member firms, whose numbers have even appreciably increased in the pandemic."

### Michael Buller, Chairman of the Verband Internet Reisevertrieb e.V.

**What will the working world of tourism look like after corona? How does tourism work have to be rethought?**
"The corona crisis has resulted in a massive increase in the ways people work together digitally and the concomitant blurring of the boundaries between private and working life. This will lead to quite a change in the work culture. The tourism industry is open to the aspects of 'New Work'. It will implement new forms of working and make them available to the customers by offering a range of products geared to their specific needs. The mingling together of professional and private interests but also the lack of both the demarcation of working time and interpersonal relationships will further open up the borders between tourism and non-tourism. Workation as a derivative way of life will not only be lived by digital nomads but will become the natural way to do things in many levels of society. It is here that the tourism industry will create credible and value-adding products."

### Hans Simon, Shareholder in Onlineweg Touristik GmbH and New Travel League

**What consequences does the corona pandemic have for the employers in the tour operator and travel agency segments?**
"The short-time work scheme and temporary financial assistance are currently helping the employers in the tour operator and travel agency segments. But there will definitely be a shake-out in the market. Businesses that were well-placed before the pandemic will get through the crisis better. Medium-sized firms as well seem to be on a more stable footing than some large undertakings, as can be seen from Lufthansa and TUI, which have to shed thousands of jobs. A fresh start in tourism can only succeed if we steadfastly focus on sustainability on both the customer and the employee side.

### Prof. Dr. Torsten Busacker, Mobility expert, Munich University of Applied Sciences

**Airlines such as Lufthansa, but also airports have been hit hard by the pandemic and have announced redundancies on a large scale. How do you read the medium- and long-term consequences for the job market in this sub-sector of tourism?**
"It is especially airlines and airports in Europe that have been hit even harder than other sub-sectors of tourism because their core business is impacted to a greater extent due to their relatively small domestic markets by borders closing and travel deterrents, such as quarantine measures. It's really difficult in this current and constantly fluid state of affairs to make any reliable forecasts as to when air traffic will reach the pre-pandemic levels again – it will probably not be until between 2023 and 2025, in fact perhaps even later. You can't keep all the staff on board for that length of time, of course. That would deplete what is in any case the very tight liquidity even faster and the bridging lenders – both public and private – are also calling for the airlines to bring their staffing into line with the lower demand there will be for years.

The airlines are also using this cutback in personnel to streamline their operations, with many activities not directly relevant for the cash flow or safety also being scaled down or dropped for the time being to reduce overheads. What's more, in the prevailing air-traffic situation, virtually no new people are being taken on, of course, which means that even important positions which become vacant through natural wastage, such as staff retiring or switching jobs, are only being filled internally for the time being and to a limited extent.

At the same time this also means that as soon as passenger demand picks up again and airlines and airports can take on staff again, there will be pent-up demand, especially for our graduates too who can fill jobs in commercial or strategic functions, such as network planning and revenue management, but also in marketing or in other strategic areas which the airlines can scale down relatively quickly but which are indispensable in the medium and long term.

It goes without saying that the medium- and long-term prospects on the job market also depend on when and how many people want to travel by plane again. I'm personally convinced that there will be a strong catch-up effect for private journeys by air as soon as carefree trips are possible again – who wouldn't have wanderlust as things stand now? I also expect business travel to recover more quickly than many imagine today. The many video conferences which by now have reached really every desk create totally new possibilities for working together each day over great distances, even across continents. In the medium term, however, this will generate a fresh demand for journeys by air because the colleagues working together this way are bound to want to meet each other in person sooner or later."

### Otto Lindner, Chairman of the Board of the Hotelverband Deutschland (IHA) e.V.

**What are the consequences of the corona pandemic for the job market in the hotel industry?**
"The consequences are brutal and diverse and their whole impact impossible to foresee at the moment. The onset of the economic woes caused by the pandemic as early as March 2020 led to many staff in their probationary period or doing casual work being laid off at short notice. Depending on the location and type of business, there were and still are today up to over 90% of the remaining staff on short-time work and they have been brought back temporarily as far as this is legally possible. Quite a large number of them have been working reduced hours for 10 months now, and that with all the material losses they have suffered as a result. The psychological stress is huge as well, with the lack of career prospects, the despair caused by the dire reports in the news and also the lack of structure of a normal working day massively felt. It now depends on really all of the November and December financial help promised by the politicians being paid out in order to stop further lay-offs."

**How will employers manage to get through the shutdown in good shape and not lose good staff to other sectors?**
"No hotel or restaurant business is getting through the crisis 'in good shape' at the moment; this term of phrase is completely out of place. Each business is struggling with its own challenges and with varying success. It's vital for all hotels and restaurants to keep the trust of their staff in this critical period in order to help safeguard their future viability. The prerequisite here is that they have already built up a trusting relationship over the years they have been working together and that they communicate clearly and in a timely manner with their staff during the crisis as well. There's no doubt that short-time work is a precious tool, a basis at least for securing salaries and also helping companies to ensure their business survival and giving them the option to keep staff employed. But we are increasingly losing valuable well-trained personnel in the crisis to sectors outside of our industry and we need to be very careful that we still fulfil our priority duty of energising and training young people in a professional manner. Already today there is, moreover, a marked increase in the unemployment figures for the hotel and restaurant trade. We can only partly stop this trend because we are not in the position ourselves to be able to put across the idea of career prospects which in these days are determined by exogenous factors.

It is our duty to fight for good employees, for only with them will the fresh start succeed."

### Tobias Klöpf, Founder of Young TIC (Travel Industry Club)

**How are junior employees and young entrepreneurs in tourism dealing with the current situation? What worries and troubles do they have?**
"Young people are still exuding a lot of optimism at the moment, which makes them a valuable factor as regards the mood in the firms. Junior staff don't have the expectation of 'bigger, faster, further' but are in a very reflective mood and are open to a new tourism industry.

This new market will put meaningfulness and sustainability centre stage. What was up to now only felt to be trends in the firms will hopefully now change the products and services."

**What signals can employers in tourism send out to young employees who no longer see tourism as a guarantee for job security?**
"The future in this ceaselessly volatile market will only work out if young and motivated employees are included in decisions at an early enough stage.

Young people find it much easier to sell what there is a demand for tomorrow, while many business leaders despair of finding their way back to the 'customary and established' processes and products again.

A good opportunity to dismantle hierarchies, to let in fresh wind and young ideas and thus to emerge from the crisis as a more attractive employer."

**Prior to corona we had a shortage of skilled personnel in many sectors of tourism. How do you think the tourism job market will change?**
"We were short of staff in my opinion. All highly motivated and well-trained staff who were networked in Young TIC, for example, also found great jobs.
You can certainly talk of the switch to the employers' market after corona, of course, because the demand is bound to fall.

The declining negotiating power of career starters is not only bad. Loyalty to the employer, the focus on higher salaries and competitive ideas might then increase again. To put it another way: the work-life balance discussion is waning again. You can always see these issues from all sides but what is needed at the moment is enduring optimism and consistent flexibility."

Sabine Bösl and Celine Chang asked the questions.

(BDL) German Aviation Association (2020): Bericht zur Lage der Branche. www.bdl.aero/de/publikation/ bericht-zur-lage-der-branche/ [12.01.21]

(BMWi) Federal Ministry for Economic Affairs and Energy (2017): Study “Wirtschaftsfaktor Tourismus in Deutschland”- Kennzahlen einer umsatzstarken Querschnittsbranche. www.bmwi.de/Redaktion/DE/Publikationen/Tourismus/wirtschaftsfaktor-tourismus-in-deutschland-lang.html [12.01.21]

Chang, C. , Eberhardt, K. (2020): A regional approach to attracting and retaining employees - a chance for small and medium-sized hotels? In: Gardini, M. A., Ottenbacher, M. C., Schuckert, M. (eds.): Routledge Companion to International Hospitality Management: 401-422. Routledge.

(DEHOGA) The German Hotels and Restaurants Association (2020): Aktuelle Zahlen zu Kurzarbeit und Arbeitslosigkeit - Corona-Schock im Gastgewerbe. www.dehoga-bundesverband.de/presse-news/aktuelles/aktuelle-zahlen-zu-kurzarbeit-und-arbeitslosigkeit-corona-schock-im-gastgewerbe/ [12.01.21]

Engelhardt, K. (2020): Interne Kommunikation mit digitalen Medien. Springer.

European Commission (2010): Short-time working arrangements as response to cyclical fluctuations. European Economy Occasional Papers 64.

Gössling, S., Scott, D., Hall, M. C. (2021): Pandemics, tourism and global change: a rapid assessment of COVID-19. Journal of Sustainable Tourism, 29(1), 1-20.

Hutter, C., Weber, E. (2020): Corona-Krise: die transformative Rezession. Wirtschaftsdienst, 100, 420-431.

(IAB) Institute for Employment Research (2020): IAB-Prognose 2020/2021: Arbeitsmarkt auf schwierigem Erholungskurs. www.iab.de/194/section.aspx/Publikation/K200922DR4 [12.01.21]

Koenen, J. (2020): Stellenabbau bei der Lufthansa geht schnell voran - außer in Deutschland. www.handelsblatt.com/unternehmen/handel-konsumgueter/luftfahrtkrise-stellenabbau-bei-der-lufthansa-geht-schnell-voran-ausser-in-deutschland/26690942.html?ticket=ST-6360674-RwG7vV-Z7Q17upBPTxqYb-ap4 [20.01.21]

Konle-Seidl, R. (2020): Kurzarbeit in Europa: Die Rettung in der aktuellen Corona-Krise? www.iab.de/185/section.aspx/Publikation/K200527BRY [12.01.21]

Lufthansa Group (2020): Lufthansa und ver.di einigen sich auf Krisenpaket bis Ende 2021. www.lufthansagroup.com/de/newsroom/meldungen/lufthansa-und-verdi-einigen-sich-auf-krisenpaket-bis-ende-2021. html [12.01.21]

Schein, E. H. (2018): Organisationskultur und Leadership. Vahlen.

Schlautmann, C. (2020): Tui streicht in der Coronakrise 8000 Stellen. www.handelsblatt. com/unternehmen/handel-konsumgueter/ reisekonzern-tui-streicht-in-der-coronakrise-8000-stellen/25824778.html?ticket=ST- 6475796-gq5nj4CLD-O0UIAb6w1zH-ap4 [20.01.21]

Statista (2021a): Weltweiter Umsatz mit Passagieren im Flugverkehr von 2004 bis 2021*. https://de.statista.com/statistik/ daten/studie/4366/umfrage/weltweiter-umsatz-mit-passagieren-im-flugverkehr/ [18.01.21]

Statista (2021b): Anzahl der sozialversicherungspflichtig Beschäftigten im Gastgewerbe (saisonbereinigt) in Deutschland von Oktober 2020 bis Oktober 2020*. https://de.statista.com/statistik/daten/studie/483126/umfrage/anzahl-der-beschaeftigten-im-gastgewerbe-in-deutschland/ [12.01.21] Federal Statistical Office (2021a): Press release no. 024 of 18 January 2021. www.destatis.de/DE/Presse/Pressemitteilungen/2021/01/PD21_024_45213.html [18.01.21] Federal Statistical Office (2021b): Press release no. 061 of 11 February 2021. www. destatis.de/DE/Presse/Pressemitteilungen/2021/02/PD21_061_52411.html;jsessionid=C2B-F16733CCEB824C32EB6EE424EB547.internet722 [16.02.21]

Stauß, S. (2020): Wer schafft den Weg aus der Krise? Allgemeine Hotel- und Gastronomiezeitung, 42, p. 19.

Strasdas, W., Lund-Durlacher, D., Giraldo, M., Kück, F., Lehners, S. (2020): Die Corona-Krise und ihre Implikationen für die nachhaltige Entwicklung des Tourismus. www.kompetenzzentrum-tourismus.de/wissen/studien/394-die-corona-krise-und-ihre-implikationen-fuer-die-nachhaltige-entwicklung-des-tourismus [12.01.21]

TUI Group (2021): Annual report 2020. www.tuigroup.com/de-de/investoren/geschaeftsberichte/sonderseite-geschaeftsbericht-20 [12.01.21]

(VDR) Verband Deutsches Reisemanagement e.V. (2020): Ergebnisse der VDR-Barometerumfrage zum Coronavirus/Covid-19 (Unternehmen). www.vdr-service.de/corona/ergebnisse-der-vdr-barometerumfrage-zum-coronaviruscovid-19-corporates [12.01.21]

Weber, E. (2020): Corona, Strukturwandel und Arbeitsmarkt. ifo Schnelldienst, 73(9), 17-19.

# Corona in Figures

## Analysing the hotel market in Germany and Europe

A sector in crisis: for a long time hotel businesses' sensitivity to economic fluctuations hasn't been as manifest as it has been recently.

bong/stock.adobe.com

In every crisis lies an opportunity: How has the corona pandemic transformed the hotel industry in Germany and Europe? What opportunities does this momentous sea change offer for the long-term development of the European accommodation market? A demand-side analysis of various German and European accommodation markets sets out to examine the impacts of the pandemic on the hotel trade.[1]

1 The analysis covers the period up to the cut-off date 23.12.2020. The data situation at this point in time was as follows: Germany as a whole up to and including October 2020; European cities, German cities and the Tegernsee valley up to and including November 2020.

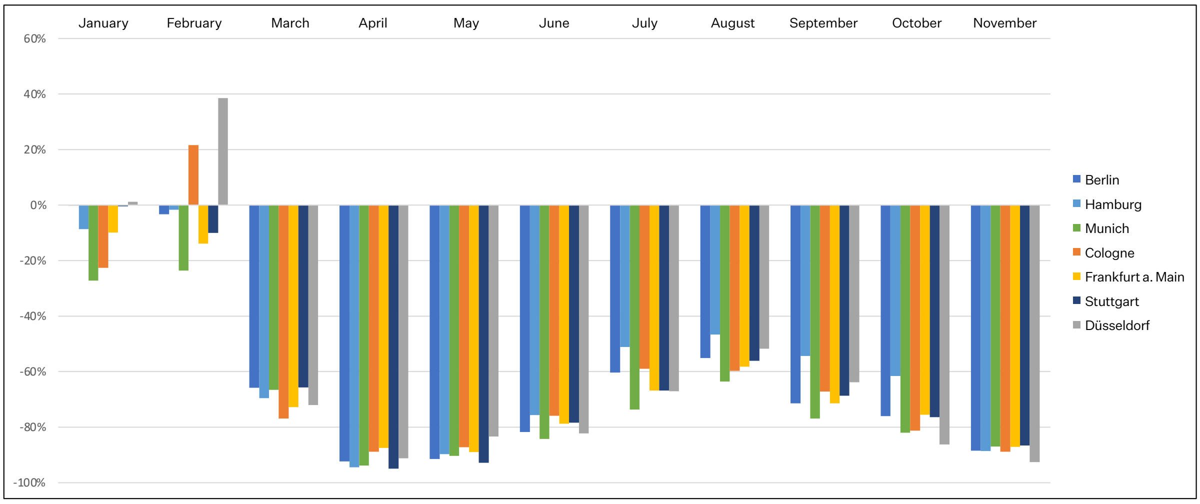
Anja Bödinger, Dennis Imhof

### Development in Germany

The German accommodation market had been seeing arrivals and overnight stays growing continually in the years prior to 2020. With 495.6 million guests staying overnight, 2019 was the tenth record year in succession.[2] With the outbreak of the corona pandemic at the beginning of 2020, the situation in Germany changed radically. The upward trend over many years came to an abrupt end due to the restrictions and business shutdowns imposed. While there was still a positive change on the previous year across Germany in arrivals (Δ 4.1%) and overnight stays (Δ 5.3%) in February 2020, these fell one month later by 61.0% and 52.6% respectively compared with the same month the previous year. The two quantities reflecting demand were likewise significantly below the previous year's values in the months that followed, although domestic tourism saw an upswing again in the summer months. Owing to the cancellation of most of the (large-scale) events and trade fairs for the whole year, stability

2 cf. Hotelverband Deutschland 2020, p. 67

English version of this article available for iOS and Android on our app "Tourismus Management Passport"




Illustr.1: change in monthly RevPAR in German cities 2020 on the previous year in % (January to November).

STR

did not return to the accommodation for this entire period.[3]

From the beginning of November, the accommodation establishments across Germany had to close their doors yet again to tourist guests, with only a few exceptions in a number of Länder during the Christmas public holidays. The renewed closure, which at the time of publication may extend until after Easter 2021, exacerbates the situation of the establishments. The so-called "corona aid" of the federal government, lowering VAT[4] and prolonging the increased short-time workers' supplements[5] are designed to help the tourism businesses too for their losses of turnover. The businesses are treading various paths through the crisis, with some of them using the time they are closed for renovations, while others are thinking up new business ideas (for example renting out hotel rooms to people working remotely). A number of hotels are offering their rooms for quarantine or for isolating the ill. Irrespective of the hotels' crisis strategy, agreements with property owners and other stakeholders are an important factor in these troubled times (suspending instalments, for instance, or lowering the rent). For all hosts in Germany, the year 2020 meant getting to grips with extreme circumstances and unprecedented regulations, be they to prepare a totally new hygiene and social-distancing plan to reduce the risk of infection or to implement the constantly changing bans on providing accommodation to guests arriving from hot spots.

## Development in German A locations

The colossal adverse impact of the pandemic on the hospitality sector can be clearly seen from the change in the hotel-specific key indicators of the top 7 cities, namely Berlin, Hamburg, Munich, Cologne, Frankfurt am Main, Stuttgart and Düsseldorf. The main reasons for the sharp falls in these cities are to be found in the strong focus on international source markets, the dependence on large-scale events such as trade fairs, and the tendency for there to be higher rates of infection in cities.[6]

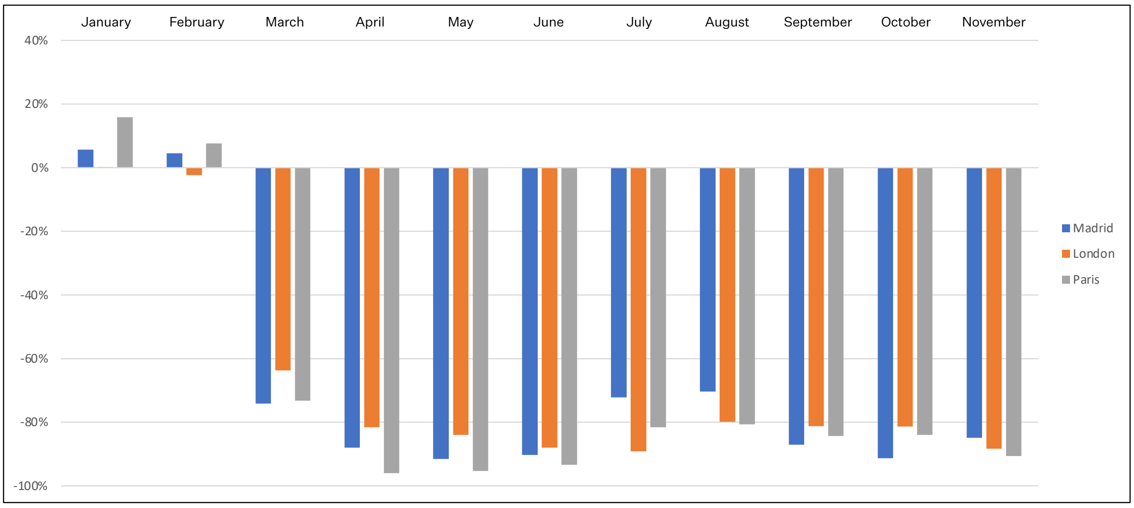
The German A locations started off into the year with stagnating to slightly declining performance numbers. In January, Munich and Cologne were already seeing significant falls in their RevPAR (revenue per available room). Whilst a mixed picture emerged in February and increases were observed at least in Cologne and Düsseldorf, the consequences of the pandemic breaking out and the restrictions imposed on businesses were immediately apparent in March. The revenues per available room fell to between a quarter and a third of the previous year's level (e.g. Cologne: €24.87 in March 2020 compared to €107.58 in March 2019). The months of April and May, which fell victim to the lockdown for almost the entire period, led to RevPAR plummeting by some 80 to 90% in the top 7 locations. Stuttgart was visited with the most extreme loss of the year in April – the RevPAR nosedived by 95% compared to April 2019 and resulted in an alarming value of € 3.76.

A recovery of sorts surfaced in the summer of 2020 but this primarily benefitted not the city hotels but the holiday hotels in the domestic target areas. Due to the falling number of cases and with it the lifting or easing of travel restrictions, the declines for the months of July to September turned out to be kinder in some cases. Be that as it may, the RevPAR of the German cities reached roughly half of the previous year's level at the most. Standing out here is the fact that Hamburg showed the smallest declines (e.g. "only" 47% down to €47.30) for five months in succession, while Munich with average falls of 75% from June to September performed relatively poorly.

The beginning of the second surge of infections and tighter restrictions on travel, which culminated in a renewed ban on tourist travel being declared from the beginning of November, had a devastating impact on the key performance indicators of the German city hotels. The drops in RevPAR were already between 62% (Hamburg) and 86% (Düsseldorf) as early as October. In November, which represents the last month for this analysis, the losses in all A destinations were once again roughly 90%.

3 cf. Federal Statistical Office n.d.
4 cf. Dehoga n.d.
5 cf. Federal Government 2020

6 cf. Tagesschau 2020




Illustr. 2: change in monthly RevPAR in European metropolises 2020 on the previous year in % (January to November).

STR

Looking more closely at the indicators shows that the falls in the RevPAR key figures, which are defined as the product from the room occupancy and the average net room rate, can be attributed first and foremost almost entirely to the declining rates of occupancy. The price level of accommodation services may have fallen by approx. 9% (Düsseldorf) to roughly 29% (Munich), but on the occupancy side there were strikingly stronger declines of 52% (Hamburg) to 60% (again Munich) in the period under review.

On the basis of this market analysis, Munich emerges as the "loser" among the German cities. The Bavarian capital was walloped by a 70% tumble in the RevPAR compared to the same period of the previous year, which resulted in a value in the region of a mere €27.00[7]. Hamburg saw the lowest, albeit still strong decline, with RevPAR in the months of January to November 2020 falling by 58% to approx. €34.00 compared to 2019.

## Development in European cities

Madrid, London and Paris – European metropolises which hold an appeal for city tourists and business travellers alike – (slightly) increased their RevPAR on the corresponding month of the previous year in January 2020. Madrid and Paris posted a further increase in the following month, while a negative trend was already materialising in London. From March, both room occupancy and the ADR (average daily rate) plunged in the three European capitals – much the same as in the German locations -, which accordingly resulted in a sharp drop in the RevPAR. It was above all Paris which suffered a decline in the months of April and May – roughly 96% and 95% respectively – in the revenue per available room, this being because room occupancy fell to below 10% in these two months. Similar to Germany, a less serious deterioration in the figures reflecting demand was recorded in the summer months of July and August. September had no sooner started, however, than the three cities were again hit by a negative change in excess of 80% on the same month in the previous year. The European metropolises fared badly in terms of demand in 2020 and generated less demand in the summer months than the German cities.

## Development in the Tegernsee valley

As already indicated, the summer of 2020 witnessed an upswing in domestic tourism. A few hotels reported of a better high season than the previous year, which is why the holiday hotels were swiftly and perhaps overhastily declared the supposed "winners" of the crisis. In order to objectively assess these impressions, the demand is analysed below using the accommodation market of the Tegernsee valley to illustrate this.[8]

At first glance, a similar trend to that in the German cities can be discerned in the Tegernsee valley. Following heartening developments in the first two months of the year, the national lockdown from the middle of March precipitates a serious deterioration in the figures for overnight stays, with the month of April and its slump of 94% (roughly a mere 7,000 overnight stays; 111,000 the previous year) proving to be the most problematic month.

Signs of a recovery and an upward trend subsequently appear and they reach their peak in the months of August and September with an increase in overnight stays on the previous year of approx. 4 to 7%. The second lockdown descends on the region around the Tegernsee as well from November, causing overnight stays in this month to fall by 57% compared to the previous year.

The number of overnight stays in the Tegernsee valley in the period from January to November 2020 totalled 1.16m – some 294,000 fewer than in the same period the previous year (loss of 20%). Arrivals fell by 28%, which on the other hand is a sign of an increase in the length of the stays (2020: 4.6 days; 4.2 days in the previous year). The short-lived boom of the summer was thus insufficient to compensate for the losses suffered when hotels had to close and during the periphery phases before and after the lockdown.

Future prospects

7 Annual RevPAR (January to November) determined with the help of the arithmetic average; minimal deviations possible.

8 Pure observation of arrivals and overnight stays since no data on prices is available for the market.


Illustr. 3: change in the monthly arrivals and overnight stays in the Tegernsee valley* 2020 on the previous year in % (January to November).

* The Tegernsee holiday region comprises the towns of Bad Wiessee, Gmund am Tegernsee, Kreuth, Rottach-Egern and Tegernsee (town).

Tegernsee Tal Tourismus GmbH

When summing up 2020 as a whole, a positive picture for the German and European hotel trade fails to emerge. It is of great importance, however, to look towards the future in any crisis. It needs to be borne in mind that the future development of the German accommodation market depends on a range of social, economic and political determinants, and certain changes are foreseeable:

- acceptance and rollout of effective vaccines as a boost for the economy and thus for the hospitality industry as well;
- stimulating domestic tourism: based on the travellers' desire for increased safety and hygiene (guests want good medical care) and the realisation that going on
- holiday in Germany can offer an interesting and varied experience too;
- greater focus on holiday hotels: hotel operators are already increasingly expanding in holiday regions;[9]
- B locations (Bremen, Rostock, Freiburg, Münster) have become more attractive for hotel operators;[10]
- change in the booking behaviour (at shorter notice or with travel cancellation insurance);
- slow upswing in international tourism: depending on how things develop for the airlines (mandatory testing or "vaccine passports" might be required in order to fly). Cities with many international guests will have to adapt to reach national guests too;
- swifter market shake-out: businesses without any special USPs and/or viable cost structures will leave the market;
- slow recovery of the trade fair and events segments expected; a trend towards hybrid events[11] is discernible;
- digitalisation in the hospitality sector will continue to gain in importance;
- the industry grappling with insecurity and not being able to plan with various consequences (e.g. staffing should be more flexible).

It will take time to return to the pre-crisis levels. Depending on the segment, the phases of recovery will take longer and the changes will be more profound.

**Many thanks to STR and Christian Strieder for providing the accommodation data.**

9 cf. Cushman & Wakefield 2020
10 cf. ibid.

11 With hybrid events, only some of the participants are physically present at the venue; other participants are linked up digitally.

**Literature**

Federal government (2020): Erleichterter Zugang zur Kurzarbeit wird verlängert; www.bundesregierung.de/breg-de/themen/coronavirus/verlaengerung-kurzarbeitergeld-1774190; retrieved on 19.12.2020.

Cushman & Wakefield (2020): Operator Beat Q4 2020: Betreiberinteresse der Top 20 Hotelstandorte in Deutschland.; www.cushmanwakefield.com/de-de/germany/news/2020/12/hotel-operator-beat-q4; retrieved on 20.12.2020.

Dehoga (n.d.): Wichtige Informationen für Gastronomen und Hoteliers; www.dehoga-corona.de/; retrieved on 20.12.2020.

Hotelverband Deutschland (IHA) e.V. (publisher), Hotelmarkt Deutschland 2020, IHA-Service GmbH, Bonn

Federal Statistical Office (n.d.): Gastgewerbe und Tourismus; www.destatis.de/DE/Themen/Branchen-Unternehmen/Gastgewerbe-Tourismus/_inhalt.html; retrieved on 19.12.2020.

STR Germany GmbH (n.d.): Personalisierter Marktreport für ausgewählte Städte; cut-off date 23.12.2020. (main source of the data analysed)

Tagesschau (09.10.2020): Risikogebiet Großstadt; www.tagesschau.de/inland/corona-grossstaedte-101.html; retrieved on 21.12.2020. Issue 01|2021 Tourism Management Passport 39

# Travelling into the Past

## Cultural travel experiences using virtual-reality technology

A department research project on using virtual reality (VR) in a cultural heritage context was conducted in the summer term of 2020. The idea behind it was to examine to what extent VR technology applications are suitable for conveying the Bavarian cultural heritage*.

The research project was carried out by Prof. Dr. Andreas Humpe and Prof. Dr. Marion Rauscher. We would like to thank Ms Sabrina Coler for her valuable support in writing this article.

* see Rauscher 2020 for the conceptual background

Marion Rauscher

The Munich-based company TimeRide GmbH, which offers a virtual journey back in time through the history of Bavaria, acted as our partner in practice. This virtual journey means travellers can experience a trip which in reality could not be done at all in this form. The places TimeRide takes you to can of course be visited in today's form and in their current ambience (Theresienwiese/Oktoberfest, Neuschwanstein, Bamberg Cathedral etc.), but the VR technology means you can experience the works and events in the past and it transports you to a faithful copy of the scenery of that time. Given this context, TimeRide thus offers an enrichment to travelling which enables you to experience at first hand what you have only theoretically heard about or seen. With the help of a visitor survey, the department identified the points of departure for the acceptance of the technology in the context described.

## Virtual journey through the history of Bavaria

The experience itself lasts around 45 minutes and begins with an introduction to the life and the interests of the erstwhile Bavarian King Ludwig II. The setting for the first stage is the library of the king, where excerpts from an "antique" electronic book, which is also suitably illustrated, are read out to the visitors. In a second room, the visitors then go on a VR journey in a flying peacock gondola – one of the king's fantastic dreams – through 7,000 years of Bavarian history. They are accompanied by a fictitious time-traveller, the narrator of the story. The narrator speaking personally to the visitors makes it easier for them to immerse themselves in the experience (Jacobson & Holdens 2007). The focus, however, is on the visual elements. The story itself is very condensed and easy to understand. This helps to prevent the visitors being cognitively overstretched and confused, something which Wu et al. (2013) warned against.

Illustr. 1: the first Octoberfest in 1810 – flight over Munich's Theresienwiese in a flying peacock gondola

TimeRide GmbH Munich

Illustr.2: Frederick I. Barbarossa's ride over the Stone Bridge in Regensburg in the year 1189 – setting off for the Third Crusade.

TimeRide GmbH Munich

The participants wear VR glasses during the VR experience which completely cut them off visually and auditorily from their real surroundings. Haptic stimuli are added as well to reinforce the feeling of being present in the experience. Specifically, the time-traveller senses wind and his chair rocking slightly, which serves to simulate the flight. All in all, the setting is, thus, technically very sophisticated. Any activity by the visitor is limited during the VR experience to purely watching, however (cf. in this respect Flavian et al. 2019).

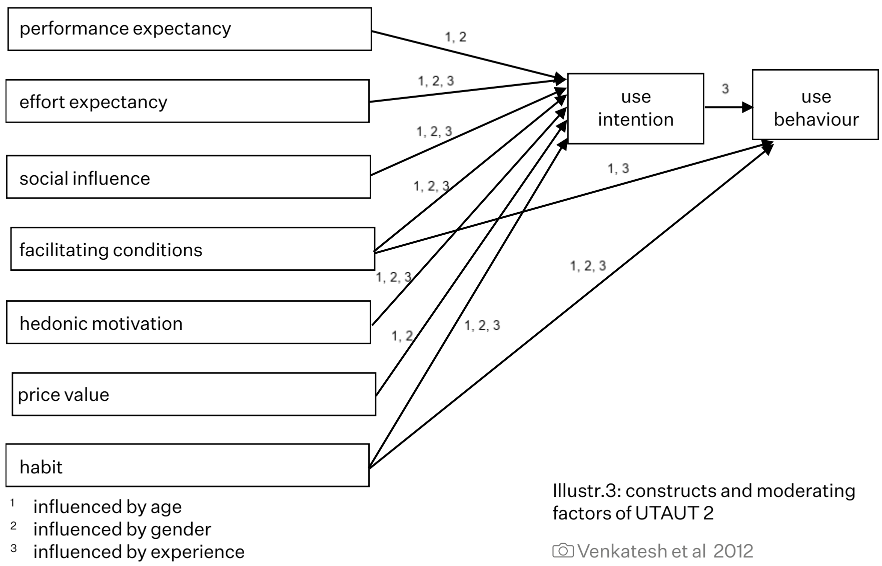
The study was conducted in the premises of TimeRide GmbH in Munich in August 2020. Those participating in the survey were asked to fill out a 2-page standardised questionnaire about their experience straight after taking part.

## Theoretical background

The theory underlying the survey is based on the second iteration of the "Unified Theory of Acceptance and Use of Technology (UTAUT 2)" (Venkatesh et al. 2012). The aim of this model is to assess the intention to use a certain consumption-based technology and to explain the resultant actual user behaviour. The central research question of this study was whether VR applications can convey travel experiences in the cultural-historical context. In order to answer that question, the factors driving an acceptance of the technology were to be analysed by means of the model.

UTAUT 2 consists of seven constructs which influence the intention to use a technology: performance expectancy, effort expectancy, social influence, facilitating conditions, hedonic motivation, price value, and habit. The use intention in turn influences the actual use behaviour together with the facilitating conditions and the habit. The respondents' age, gender and experience have an effect on the above-mentioned constructs to a certain extent, with the result that the model takes the following form:

Since it was the aim to evaluate whether a pure VR experience is accepted as a means of communicating the cultural heritage, the questions asked were not limited solely to the use of the technology as such. It was rather the case that the participants were asked about the content too. The point "performance expectancy" in particular, for instance, was exclusively tailored to using the technology, while the thrust of the point "facilitating conditions" was the comprehensibility of the content. The latter is based on the assumption that the intention to use a technology for educational purposes vis-à-vis the performance expectancy subject of cultural heritage is all the greater the more clearly and lucidly the content is presented to the user.




Illustr.3: constructs and moderating factors of UTAUT 2

Venkatesh et al 2012

Deutsche Fassung in der App verfügbar

The interviewees were not asked about their previous experience. Virtual reality applications of the type in the study are something of a new phenomenon and are generally not yet used on a regular basis. It was therefore felt that there was nothing really to be gained from enquiring about their previous experience.

**Results**

A total of 314 questionnaires were evaluated. The demographic information is as follows:

A quality measurement of the model produced reasonable results, although there is potential for improvement on the whole.

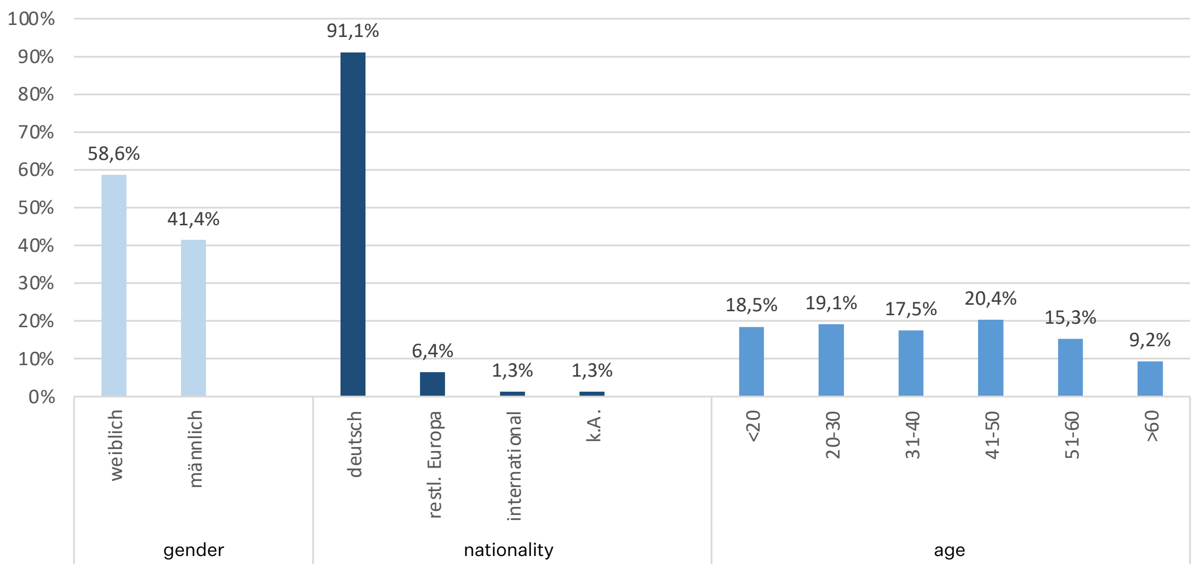
In line with Venkatesh et al. (2012), it was confirmed that the performance expectancy, the facilitating conditions, the hedonic motivation and the price value have a positive effect on the use intention. The social influence, on the other hand, does not appear to influence acceptance of the technology. It is rather that the product itself attracts sufficient attention of people happening to pass by for them to then want to enter the premises and book the experience. This may be attributable to the fact that such technology-aided experiences are fundamentally new and they arouse such a level of curiosity in the customers that even without any specific recommendation, they want to find out for themselves. This might also be the reason why the study participants have not yet developed any habitual behaviour, which is why this factor too does not show any significant influence on the use intention. Another possible explanation is that people going on journeys prefer “more natural” experiences and the technology is

just an entertaining sideshow. So for the interviewees it is not that they search for technology-aided travel experiences out of habit, but rather that these might merely be consumed incidentally along the way.

As regards the expected use, a good story which provides interesting insights and background knowledge seems to help the technology gain acceptance. This correlation was also demonstrated by tom Dieck et al. (2019). It emerges – and this is consistent with other research findings – that a visually supported and lively account is one of the main advantages of VR applications. The results of this survey further underpin this theory since the influence of the hedonic motivation on the intention to use the technology produces the highest value. The effort expectancy, on the other hand, has an adverse effect on the use intention, in that a lower effort reduces the use intention. This seems unusual. A possible explanation is that handling the technology in this particular research setting requires hardly any effort on the part of the user. The device is already fully functional. All the visitors need to do is put the VR glasses on and watch the story. It is therefore very difficult for the users to judge whether they would have the technical wherewithal to set up the device, should they wish to use it by themselves in the future.

The actual use behaviour with regard to VR technology was the last variable considered in the study. The research results show that this is only influenced by the variables “habit” and “use intention”. Overall, most of the responses on use behaviour were more towards the bottom of the Likert scale (“seldom” to “never”), i.e. the majority of those asked do not use extended reality technology (AR, VR, 360°) on a regular basis.

This Research analysis shows that only those few for whom technology-aided (cultural) journeys have already become a habit will continue to use such applications in the future too. Interestingly, the




Illustr.4: demographic data of the survey

Eigene Darstellung

influence of use intention on actually using the technology is rather low, which again might be linked to the high innovative level of such technology-aided experiences. The use of the technology currently seems to be driven more by those who are already relatively tech-savvy. It can be presumed, however, that VR technology will see great improvements in the coming years and will also be used in the mass market. Given this environment, whether the use intention is reflected to a greater extent in actual use in the future should be kept under observation.

As far as age is concerned, it is above all the higher age groups which appreciate the acquisition of knowledge made possible through the VR setting. This is at odds with Avci (2019), who found that it is primarily the young generation who are receptive to extended reality technology as a means of learning opportunities. It needs to be pointed out, however, that in our research setting, learning was not an active process like it was with Avci (2019) but rather just passive consumption, which might account for the different result. At the same time, entertainment or hedonic aspects play a more important role for the higher age groups, who might not be as familiar with this technology-based experience as their younger counterparts. Gender did not influence the result in the main. Only the facilitating conditions were judged differently. Specifically, male users demonstrated a greater paucity of information than female users in this context with regard to cultural background knowledge.

### Relevance of the results

Empirical research has a number of limitations. The study was conducted during the time of the corona pandemic and so the visitor sample is not representative. This becomes evident just from the high proportion alone of the respondents with German nationality. The greatest percentage of them by far are resident in Bavaria – over 50% in fact in Munich and its immediate vicinity. Moreover, it is possible that the strict hygiene regulations which had to be observed detracted from the visitor experience, thereby influencing the results of the survey.

Notwithstanding these and other limitations, the results of the survey are of significance for various stakeholders, for they support providers of VR cultural experiences in creating entertaining and personally appealing VR encounters for their customers. It has been shown that telling a good story coupled with a high entertainment value (hedonic motivation) is the most relevant factor for the acceptance of the technology. If these two aspects are appropriately combined, a VR entertainment experience can be created which is attractive and informative at the same time (Palumbo et al. 2013). In this respect, the study can also help operators of real sites of archaeological and cultural interest who are prepared to tread new paths with VR technology. For VR technology promotes a transfer of knowledge and values even if, or precisely when sites are closed to the public or there is only limited access. Finally, the results are interesting for larger destination units. VR-supported applications can attract new groups of visitors and simultaneously convey impressions and values of the cultural heritage of this destination.

**Literature**

Avci, E. (2019): Enhancing the Cultural Tourism Experience Through Augmented Reality. Advances in Global Business and Economics. Globe 2019, 2, 215-230.

Flavián, C., Ibánez-Sánchez, S. & Orus, C. (2019): The impact of virtual, augmented and mixed reality technologies on the customer experience. Journal of Business Research, 100(C), 547-560. https://doi.org/10.1016/j.jbusres.2018.10.050

Jacobson, J. & Holden, L. (2007): Virtual Heritage: Living in the Past. Techne: Research in Philosophy and Technology, 10(3), 55-61. https://doi.org/10.5840/techne200710312

Palumbo, F., Dominici, G. & Basile, G. (2013): Designing a Mobile App for Museums According to the Drivers of Visitor Satisfaction (SSRN Scholarly Paper ID 2298361). Social Science Research Network. https://papers.ssrn.com/abstract=2298361

Rauscher, M. (2020): Design im virtuellen Raum. Reisen in die Welt von gestern. Passport 2020(1), 38-41.

tom Dieck, M. C., Jung, T. & Michopoulou, E. (2019): Experiencing Virtual Reality in Heritage Attractions: Perceptions of Elderly Users. In: tom Dieck, M. C. & Jung, T. (ed.): Augmented Reality and Virtual Reality: The Power of AR and VR for Business, 89-98. Springer International Publishing. https://doi.org/10.1007/978-3-030-06246-0_7

Venkatesh, V., Thong, J. & Xu, X. (2012): Consumer Acceptance and Use of Information Technology: Extending the Unified Theory of Acceptance and Use of Technology. MIS Quarterly, 36(1), 157. https://doi.org/10.2307/41410412

Wu, H.-K., Lee, S. W.-Y., Chang, H.-Y. & Liang, J.-C. (2013): Current status, opportunities and challenges of augmented reality in education. Computers & Education, 62, 41-49. https://doi.org/10.1016/j.compedu.2012.10.024