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# Contextual Factors of Resilient Tourism Destinations in a Pandemic Situation: Selected Cases from North and South Tyrol during the SARS-CoV-2 Pandemic

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**Abstract:** This study examines critical factors for tourism destination resilience in the first year of the SARS-CoV-2 pandemic in North Tyrol (AT) and South Tyrol (IT). Based on a mixed-method approach, the summer seasons of 2019 and 2020 are compared regarding change in overnight stays in 26 municipalities. The results highlight the importance of the classical 4Ps of marketing and specific contextual factors. These and their implications for research and practice are discussed. Marketing mix aspects most relevant for resilience in a highly tourism-dependent region are outlined.

**Keywords:** resilience; absorption; SARS-CoV-2; Tyrol; marketing; marketing mix



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## 1. Introduction

As an important part of the global economy [1,2], the tourism industry contributes significantly to economic development in various regions [3,4]. It is characterized by intense competitive rivalry, risk, leverage, capital intensity [5]. Moreover, it is inherently vulnerable to various types of crises [6,7], especially to the regional occurrence of infectious diseases [8]. Crises and disasters always harm tourism [9], especially in destinations that are highly dependent on tourism such as remote rural areas [10]. These destinations and the industry, in general, are pressured to quickly recover and/or adapt. Doing so sustainably in the sense of a rapid reaction using existing resources is essential in the first phase of reacting to a crisis, while keeping a strategic outlook on the long-term effects of chosen coping strategies.

As an example, and case, this paper examines how the hospitality and tourism industry of North and South Tyrol (the former in Austria, the latter in Italy) was affected by the pandemic and which characteristics of the marketing mix influence different levels of resilience by comparing municipalities with substantial versus more moderate losses. For this, quantitative data on overnight stays of the summer 2020 are compared to 2019 and analyzed in depth. Furthermore, the findings of the data analysis are complemented by information gathered through qualitative interviews. This paper focuses on short-term resilience and absorptive capacity, thereby addressing this gap in the literature.

The contribution of the study is twofold: First, it contributes to a deeper understanding of tourism destinations from a resilience and crisis perspective and highlights critical (survival) factors in a pandemic changed macro-environment. Second, limitations for assessing and evaluating resilience-relevant characteristics of tourism destinations are

explored and discussed. Thereby, scale in the sense of different levels of action and operation is applied, plus the marketing mix concept as a framework for analysis.

### *1.1. Resilience in Tourism and Tourist Destinations*

The concept of resilience has seen a proliferation of different definitions, of which one of the most utilized is the one provided by the United Nations Office for Disaster Risk Reduction [11]. It defines resilience as “[t]he ability of a system, community or society exposed to hazards to resist, absorb, accommodate, adapt to, transform and recover from the effects of a hazard in a timely and efficient manner [ . . . ]” [11].

As the first step in a resilience assessment, the object under scrutiny and the disruption impacting the object need to be defined [12]. For the present paper, the impacts of the SARS-CoV-2 pandemic on tourism destinations will be analyzed. The latter are socioeconomic systems composed of many actors collaborating to create a coherent tourism product [13]. The term destination is used at different scales and can be applied to a municipality or part thereof, a region, a country, and even larger transnational areas [14]. The present paper uses the term destination to refer to political districts consisting of geographically connected individual municipalities, of which eight per destination are analyzed (also see Section 2).

The current disruption affecting tourism destinations can be defined as an external shock whose sudden emergence revealed the vulnerability of the tourism systems regarding disease outbreaks [15,16]. In case of a shock, coping is especially challenging, as there is a sudden increase in uncertainty, requiring immediate actions in an often complex and volatile situation [17].

Depending on the magnitude and the temporal continuation of the shock, the intensity of its impact on tourism destinations can be minor or long-lasting, requiring different coping strategies. Initially, the aim is absorbing the disruption while maintaining the overall system structure [18–20]. This pursuit of system stability in the face of turmoil is delineated by the concept of Engineering Resilience. It focuses on the duality between the preservation of the system’s initial equilibrium and a certain degree of systemic flexibility, although the latter does not lead to a modification of the system’s structures [21,22]. In case of the temporal persistence of the effects of the disruption, adaptations can be necessary through which the system’s structure is slightly modified [23]. Destinations that managed an initial reaction to the shock better, i.e., more sustainably, could be expected to have an economic and temporal advantage for proceeding through the coping phases. This hypothesis, however, needs to be investigated, starting by analyzing which destinations recover in a more timely manner in terms of overnight stays and focusing the notion of Absorptive Capacity.

According to Cutter et al. [24], “absorptive capacity is the ability of the community to absorb event impacts using predetermined coping responses”. Due to the novelty of the situation [25], the complex structure of tourism destinations [26], the high level of uncertainty regarding the future development of the pandemic [27], and the limited innovative capabilities of family tourism businesses [28], which are a cornerstone of alpine tourism [13], immediate responses to the situation are challenging. These were required in the first year of the pandemic and its summer season, lasting from May to October 2020.

The initial phase of the crisis was characterized by the closure of the tourism businesses and infrastructures, demarking the inoperative dimension of the tourism industry, during which internal economic resources were utilized to counteract the loss of revenue, which was followed by the depletion of public economic resources in order to support (tourism) businesses and employees [29,30]. Although the restrictions were alleviated, the effects of the pandemic lasted well throughout 2020 (and, of course, in the subsequent years). Due to limited immediate infrastructural and organizational flexibility, the short-term absorptive coping mechanisms of tourism systems during severe disruptions largely rely on marketing activities within the scope of national pandemic-related travel regulations.

### 1.2. Marketing Mix (7P)

The marketing mix is “the most fundamental concept of marketing” [31] with a history of several decades of development and refinement [31,32], leading to a widely used framework of seven elements. This is based on the so-called 4P model of marketing that focuses on tangible products and thus considers the product itself, its price, promotion, and place/distribution [33]. By adding three elements relevant for services, namely physical evidence, process, and people (or: participants), the model becomes applicable for tourism [34], which combines tangible and intangible aspects [35].

With a certain product, a company aims at satisfying client needs. This has to be communicated to the prospective customers (promotion), and its accessibility needs to be ensured via distribution channels, etc. (place), as well as a price set determining its value [36]. In the tourism context, the product typically is a product-service mix; thus, this P can be described as “the overall impression of the intangible, experiential product”, while place also refers to location [32]. Physical evidence is mainly relevant within the service sector as the perceivable context influences the perception of its worth and quality [36,37], it constitutes “the tangible aspects of the experiential product” [32]. People refer to the organizations’ staff dealing with the (prospective) clients, while processes comprise all activities connected to delivering a service [36,37].

Research shows that all elements of the enlarged marketing mix (7Ps) are relevant [38], but their importance depends on the type of tourism [32]. The concept provides a basic categorization of important elements but needs to be more comprehensive and refined for specific settings, approaches, and situations. Some contexts might require further elements such as co-creation/production of the experience with the client, which is included in specific concepts that were proposed [35], or adding a quality and productivity dimension to highlight their importance for the interaction between client and organization [36]. To be generalizable, this paper builds on the commonly employed 7P model, which is recommended for tourism research as it provides a broad base for application and analysis [32].

The definition of destination outlined above employs an ecosystem perspective, highlighting the actors’ interdependence and activities. Thus, we apply the marketing mix perspective on the unique selling proposition (collectively) created for the destination. As Calgaro et al. [39] highlight regarding the climate change crisis, the vulnerability of destinations regarding external shocks depends on their characteristics. These need to be taken into account to define sustainable short-term and long-term reactions. Focusing on the factors not relevant solely for climate change, our conceptual framework (see Section 2 and Appendix A) summarizes them based on the marketing mix elements.

This work examines the marketing mix and its effects on resilience in terms of absorptive capacity based on a mixed-methods design. We investigate municipalities in North and South Tyrol, which are highly tourism-dependent regions in Austria and Italy. In crises, first reactions are of high relevance. This paper aims at providing deeper insights into this phase, which has not been intensively researched so far.

## 2. Materials and Methods

A conceptual framework (see Figure 1) was created by the authors which is based on the combination of resilience and marketing, differentiating between individual organizations (hotels, etc.) and destinations, but also highlighting that the former are located in the latter.

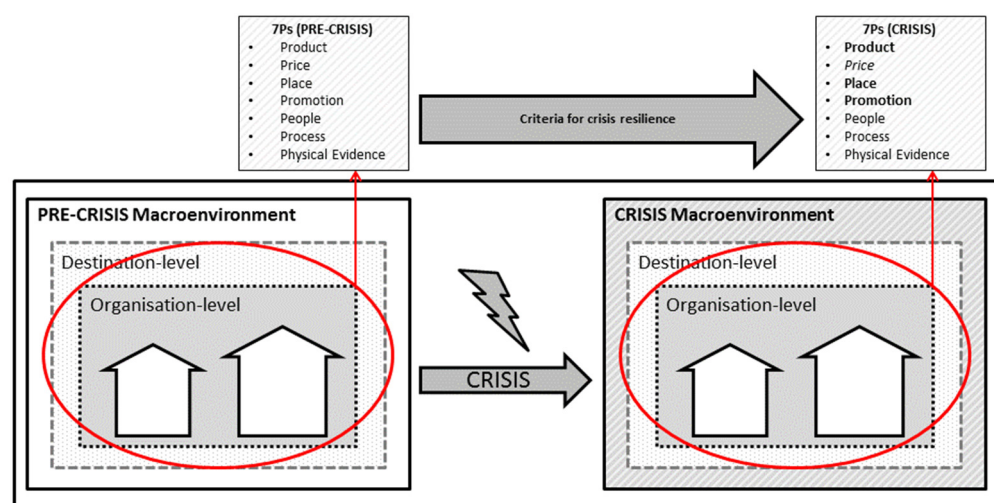


Figure 1. Conceptual Framework.

The model assumes a changing macroenvironment (from pre-crisis to crisis macroenvironment) due to the COVID-19 pandemic (e.g., lockdowns, guest limitations) and postulates that the marketing mix criteria and conditions of destinations are decisive for their crisis resilience. As the scope of changes and options for resilience differ depending on the time of analysis, the status within and after the pandemic needs to be distinguished. During a crisis, reactions are limited to given facts and possibilities at hand. However, these can already affect post-crisis choices due to path dependency, creating a dynamic interdependence. Therefore, and as the crisis is still ongoing, the paper focuses on factors connected to resilience during the pandemic from an absorptive capacity point of view.

In addition, the framework includes scale as a further theoretical perspective by considering different levels (organization level and destination level), thus recognizing that individual levels alone cannot fully control or realize tourism development and resilience [40,41]. Rather, stakeholder collaboration within and between the levels is seen as crucial, especially for resilience [42,43]. This applies not only to adaptation measures regarding corporate social responsibility, as highlighted by Font and McCabe [43], but also to the utilization of existing elements of the marketing-mix portfolio and conditions of the destination influencing its absorptive capacity. As the SARS-CoV-2 pandemic has shown, the global and national contexts have to be considered regarding, for example, travel restrictions and lockdowns, which are leading to forced standstills within the hospitality industry [44]. Thus, we assume place as location, as well as promotion, and product to be the most important aspects during the phase in which absorptive capacity is prominently needed.

This study uses a mixed-method research design, following a pragmatic approach [45,46] as widely used in tourism research [47–49]. Resilience is operationalized using overnight stays, as this is considered a direct and objective measure of tourism development [50,51] and a characteristic variable of resilience and stability in a tourism system context [50].

## 2.1. Study Areas

For a map, please refer to [52].

### 2.1.1. North Tyrol

Before COVID-19, tourism accounted for 17.5% of North Tyrol's gross value-added. Almost every fourth full-time job was connected to the tourism industry [53]. It is characterized by family-run small and medium-sized enterprises [3,54] but also by regional differences and seasonal fluctuations [48]. Due to the COVID-19 pandemic, tourism flows experienced substantial declines [55], although compared to urban tourism, faster recovery is expected in areas close to nature, within which the majority of the main tourism desti-

nations are located in North Tyrol [56]. Moreover, except for the first lockdown in March 2020, health tourism was always possible in North Tyrol during the pandemic.

### 2.1.2. South Tyrol

In South Tyrol, the tourism structure is characterized by a prevalence of family-run small and medium-sized enterprises as well [57]. In 2019, tourism (defined as accommodation and food service activities by the National Statistic Institute) accounted for 11.4% of South Tyrol's gross value-added [58]. After this year, within which the highest tourism flows ever have been recorded, due to the pandemic and subsequent closing of borders as well as national lockdowns, in 2020, a sharp decline in arrivals and overnight stays was registered, amounting to an overall decrease of 35% of the overnight stays in comparison to 2019 [58]. Thus, it is especially interesting to see variations of impacts on destinations in South Tyrol and to which determinants this might be attributed.

## 2.2. Study Design

The study is structured in two parts: First, following a quantitative approach, it identifies destinations with higher and lower resilience based on the number of overnight stays. The analytical process is described in detail in Section 2.2.1. Second, based on the findings and selections of the first part, qualitative analyses were conducted to identify criteria and factors that can explain the differences between the winning and losing municipalities and thus destinations. We did so by combining two qualitative approaches: interviews with selected experts as well as structured analyses of the websites of the municipalities. In Section 2.2.2, the qualitative approaches are described in detail.

The results of all analyses were triangulated, which is an approach that examines the convergence, complementarity, and dissonance of findings gathered with different methods [59]. This data triangulation allows deriving an overall picture from many partial results and thus increasing the validity of conclusions [59,60]. Concretely, two researchers examined all data for consistencies, complementarities, and dissonances. This was completed in a constant process of discussion and reflection. Two additional researchers were involved at the end of the triangulation to validate and evaluate the analysis, the commonalities and dissonances found in terms of the research objective. Another researcher acted as an "external reviewer" to ensure the reliability and validation of the entire research process [61].

### 2.2.1. Identification of Destinations to Be Further Investigated

Publicly available data [55,62] on overnight stays in North Tyrol and South Tyrol were analyzed to identify destinations and their municipalities with higher and lower losses in overnight stays. For that, the period May–October in 2019 (pre-COVID 19 pandemic) was compared to 2020 (COVID 19 pandemic), since the free movement of people was allowed and possible during this period of the pandemic.

The two political districts in both North and South Tyrol with the highest number of overnight stays in absolute terms in 2019 were selected. During the specified period, they represented more than 30% of the total number of overnight stays in North Tyrol and more than 50% in South Tyrol. For each of the four selected districts, two municipalities with the best overnight stay development between 2019 and 2020 from May to October were selected according to *absolute* overnight stays as well as two according to *relative* (percentage) development. Similarly, in each of the four districts, two municipalities with the worst developments in *absolute* overnight stays and two with the worst *relative* developments were selected. Per political district, we thus analyzed eight municipalities, resulting in a total of 24. The capitals of North Tyrol (Innsbruck) and South Tyrol (Bozen) were added, leading to a total of 26.

To avoid distortions caused by municipalities with a particularly low level of tourism (these usually have only a marginal decline due to the pandemic in the already few overnight stays), only municipalities that had at least 1% of the overall overnight stays in the period from May to October 2019 were included in the analysis. This resulted in



a reduction in the number of considered municipalities to 21 for Pustertal, and to 17 for Burggrafenamt. For the selected municipalities, the information on overnight stays was supplemented by additional data on visitor origin and supply structure, respectively, types of accommodation (e.g., hotel categories, camping, commercial and private accommodation). Although the data are publicly available and there are publications disclosing changes in overnight stays [63,64], the municipalities in this paper are anonymized to avoid impacts on the image of destinations with more pronounced losses in overnight stays.

### 2.2.2. In-Depth Analysis to Identify Key Resilience Criteria

We employed a structured website analysis and qualitative interviews with people employed in mostly higher (leadership/management) positions in the tourism ecosystem and further tourism stakeholders. The website analysis results were independently coded by two members of the research team [65]. To provide maximum independence and validity testing, one utilized a deductive approach based on a coding framework developed beforehand that summarized key elements mentioned in the literature (i.e., [39]), representing the elements of the marketing mix. Following Mayring [66], the contents of the websites were assigned to the deductive coding framework. The other followed an inductive thematic open coding approach [67]. In doing so, the codes were openly and freely formed into as many categories as possible, incident by incident, without a framework [67,68]. Both approaches are described in research as valid options depending on the research aim [69]. As this paper is designed to build theory and test it, both were needed. The researchers independently developed summative abstractions and assumptions (interpretations) based on the results. These were compared and found to be identical, which was also tested by cross-checking combinations of codes using the software-based inductive coding data. This had additionally the advantage that, referring to McHugh [70], the inter-rater reliability of the analysis was increased in addition to the higher data respectively evaluation quality. The categories that were created covered: demographic aspects of the destination, its reachability and touristic infrastructure, the target groups, the design of product/service packages and its adequacy regarding the target groups, promotional efforts and their quality plus fit to target groups, pricing, booking processes, client satisfaction reports, interaction with the target group(s) and the evaluation of the website (attractiveness, reports about services and touristic infrastructure). The results were then clustered to differentiate between winning and losing destinations.

The qualitative interviews were unstructured and problem-centered [71]. In an exploratory process, this offers the advantage of generating comprehensive data and insights by flexibly focusing on lived experiences and attitudes [72]. The interviews aimed at enquiring regarding chances as well as challenges of the local tourism industry during the pandemic, differences between types of tourism and touristic offers, also engaging expert knowledge regarding specific geographical areas. Within the unstructured interviews, these were the main topics. Depending on the interviewee, these were emphasized to varying degrees depending on the interview process. In this way, it was possible to focus on individual persons, their perspectives, and professional areas, thus obtaining a more complete picture.

Based on Teddlie and Yu [73], we used purposive sampling. Purposive sampling involves intentionally selecting participants based on the purpose of the research, certain characteristics, or roles because they, in particular, can provide important information [73,74]. Within purposive sampling, the sample was drawn sequentially with the advantage of exploratively obtaining continually new relevant insights for the research objective [73,75]. In total, 12 interview partners were chosen from the professional networks of the authors, ensuring a trust base for valid responses, with the aim of representing a wide variety of stakeholders in the tourism sector. The interview pool thus encompassed: managers and owners of different types of hotels, managers and employees of tourism organizations, tourism-related organizations and organizations in the tourism ecosystem, employees of hotels with specific health offer-related roles, and the guest/patient perspective. The final sample size of 12 interviews

was determined by theoretical saturation, i.e., conducting as many interviews as needed until sufficient data are collected and no new findings are obtained [76]. Theoretical saturation was discussed among the authors, reflected upon, and validated by the “external reviewer” [61] described above.

The interviewees were informed about the purposes of the study before the interview and were asked for their written consent for the anonymous utilization of the information for the subsequent qualitative analysis. The interviews were conducted from February to July 2021 on the participants’ premises in person or via telephone calls by one of the authors and lasted between 10 and 70 min. The interviews were summarily transcribed based on thought protocols and notes. This procedure fulfills the analytical requirements of the present study and its objective as, in particular, it enables identifying and combining themes and patterns [77]. In addition, nine phone calls to hotels were performed to check to which degree-specific information given by the interviewees was observable in practice, namely the concrete conditions for using health touristic offers during the pandemic.

### 3. Results

In this section, the quantitative and qualitative results are described and combined.

#### 3.1. Selected Tourism Destinations for the Quantitative Analysis

The quantitative analysis was based on the comparison of the overnight stays of 2019 and 2020 of selected tourism destinations in North and South Tyrol. As the quantitative data are collected and made available by the regional statistical institutes at the municipal level of both regions, it was possible to analyze the changes in tourism flows on this level [55,62]. In order to identify the municipalities on which to conduct the quantitative (and subsequent qualitative) analysis out of the 279 municipalities in North and 116 municipalities in South Tyrol, the approach described in Section 2.2.1 was utilized.

Table 1 shows the absolute change of overnight stays in the chosen destinations of both North and South Tyrol. North Tyrol is shown in the two left columns, listing the political districts identified and the municipalities analyzed. The same is shown for South Tyrol to the right. Table 2 follows the same structure and depicts the relative changes in overnight stays.

**Table 1.** Absolute change of overnight stays between 2019 and 2020 (municipalities anonymized with capital letter indicating absolute Winners and Losers).

North Tyrol		South Tyrol	
Political District	Municipality	Political District	Municipality
Schwaz	Winner:	Burggrafenamt	Winner:
	Schwaz_W1: −11,160		Burggrafenamt_W1: −20,326
	Schwaz_W2: −11,918		Burggrafenamt_W2: −24,265
	Loser:Schwaz_L1: −222,963		Loser:
Kitzbühel	Schwaz_L2: −150,776	Pustertal	Burggrafenamt_L1: −382,190
	Winner:		Burggrafenamt_L2: −356,186
	Kitzbühel_W1: −3527		Winner:
	Kitzbühel_W2: −7515		Pustertal_W1: −11,261
Capital	Loser:	Capital	Pustertal_W2: −17,788
	Kitzbühel_L1: −151,521		Loser:
	Kitzbühel_L2: −146,731		Pustertal_L1: −130,844
	Innsbruck: −612,817		Pustertal_L2: −92,272
			Bozen: −195,842

**Table 2.** Relative change of overnight stays between 2019 and 2020 (municipalities anonymized with lower-case letter indicating relative winners and losers).

North Tyrol		South Tyrol	
Political District	Municipality	Political District	Municipality
Schwaz	Winner: Schwaz_w1: −12.88% Schwaz_w2: −16.95%	Burggrafenamt	Winner: Burggrafenamt_w1: −23.56% Burggrafenamt_w2: −26.46%
	Loser: Schwaz_l1: −43.29% Schwaz_l2: −35.88%		Loser: (Actually Burggrafenamt_L1, but already inserted within the absolute losers) Burggrafenamt_l1: −41.94% Burggrafenamt_l2: −41.87%
Kitzbüchel	Winner: (Kitzbüchel_W1, which already ranges within the absolute winners, thus not included here) Kitzbüchel_w1: −13.34% Kitzbüchel_w2: −19.49%	Pustertal	Winner: Pustertal_w1: −11.94% Pustertal_w2: −12.30%
	Loser: Kitzbüchel_l1: −49.26% Kitzbüchel_l2: −45.78%		Loser: Pustertal_l1: −34.41% Pustertal_l2: −31.18%
Capital	Innsbruck: −61.3%	Capital	Bozen: −45.2%

A larger decline of overnight stays was observed in urban areas in comparison to rural municipalities.

### 3.1.1. Tourism Flows in North Tyrol

In North Tyrol, nearly 100% of the summer tourist flows originate in Germany, Austria, the Netherlands, Switzerland and Liechtenstein, and Belgium. These source markets are also arranged based on their quantitative importance, with Germany usually accounting for between 60% and 70% and Austria up to approximately 10% of the overall tourism flows. In 2020, the German market remained the most important for the Kitzbühel and Schwaz district. Furthermore, its importance even partly increased in relation to other source markets, the apparent reason for which is the immediate proximity of these Austrian districts to the German border. The minor losses, e.g., in the Zillertal region (e.g., Schwaz\_W2 and Schwaz\_l1) can be partly explained by their geographical location. In addition, the domestic market recorded a significant increase in overnight stays in both districts and all the municipalities included therein. The percentage of domestic tourists in the municipality of Kitzbühel\_L1 rose from 24.02% in 2019 to 31.40% in 2020. The municipalities Schwaz\_W1 and Schwaz\_L2 are among the vacation destinations that more than doubled the relative percentage of domestic tourists in the summer of 2020 (Schwaz\_W1 from 5.14% in 2019 to 11.17% and Schwaz\_L2 from 8.61% in 2019 to 16.28% in 2020). The surroundings of the latter allow for a wide variety of sports and outdoor activities, including water sports, offering adventure moments for families as well as those seeking peace and quiet, making it a popular spot for locals and domestic tourists. Dutch tourists travelled to Tyrol slightly less (roughly between −1% and −3%). Campsites were more in demand in the 2020 tourism year than other types of accommodation. Swiss and Liechtenstein tourists were also registered in North Tyrol in summer 2020, but there were slight decreases in the district of Kitzbühel as in the municipality of Kitzbühel\_L1 −1.8%, Kitzbühel\_w1 −0.51%, Kitzbühel\_L2 −1.79%, and Kitzbühel\_w2 −0.14%. The municipalities of Kitzbühel\_W2 (+0.16%), Kitzbühel\_l2 (+0.3%) and Kitzbühel\_l1 (+0.32%) recorded a relative increase. In the district of Schwaz, there was a decrease of 0.86% in overnight stays by Swiss and Liechtenstein tourists in Schwaz\_L2. A visible increase was recorded in Schwaz\_W1, for which in 2019, the Swiss and Liechtenstein market accounted for 4.56%, rising to 8.28% in 2020. The 5th relevant country of origin for summer tourists in North Tyrol is Belgium,



which in the district of Kitzbühel showed a slight increase in two of eight municipalities (Kitzbühel\_w1 and Kitzbühel\_W2), and in the district of Schwaz, half of the municipalities hosted more Belgian guests (Schwaz\_L2, Schwaz\_w2, Schwaz\_W1, Schwaz\_l1) and the other half recorded a decrease (Schwaz\_L1, Schwaz\_l2, Schwaz\_w1, Schwaz\_W2).

Finally, it should be mentioned that in both political districts (excluding the third, Innsbruck), (1) both families and individual tourists are attracted with various offers, (2) nature and the mountains stand for sports, exercise, and thus health (fresh mountain air) and (3) numerous attractions are located in close proximity of each other, which provides convenience.

### 3.1.2. Tourism Flows in South Tyrol

On the political district level, regarding the source markets within the summer season (May–October 2019), Burggrafenamt exhibited a differing structure compared to Pustertal. While the former heavily depended on international tourists (Germans: 74% of the overall overnight stays in 2019), the latter focused on the domestic market (Italians: 55% of the overall overnight stays in 2019). Although throughout the summer season of 2020, international travel was gradually restored, and the share of the domestic market overnight stays saw an increase in both areas, the strong dependence of the Burggrafenamt on international tourists resulted in a decrease of  $-38\%$  of the overall overnight stays ( $-2,184,535$  overnight stays), while Pustertal recorded a  $-20\%$  ( $-1,122,629$  overnight stays).

All tourism destinations saw a substantial increase in the share of domestic tourists during the summer season 2020, which was even subsidized by the Italian state for certain groups of tourists (mainly families), and a decrease in the main international source market, namely Germany. This may be connected to the higher number of German Tourists in North Tyrol, who could have preferred a closer destination and crossing only one border in a still volatile sanitary situation.

On the level of the identified tourism destinations, a similar pattern, although not as prominent, can be identified. In general, within the identified winner and loser municipalities of both political districts, the first four source markets account for at least 90% of the overall overnight stays, namely, domestic tourism, Germany, Austria, as well as the pooled overnight stays of the guests from Switzerland and Liechtenstein. The remaining overnight stays accounted for the pooled overnight stays of the guests from Belgium, the Netherlands and Luxemburg (BENELUX), and other countries, which, due to their minor importance as source markets, are not further itemized.

The tendency toward a higher share of domestic tourism during 2019 was a general feature of the winning destinations in comparison to the losing destinations, except for Burggrafenamt\_L1, which, being a city destination, saw an overall, quite conspicuous decrease in the overnight stays in absolute and relative terms. Although the losing destinations also saw a significant increase in the domestic market in 2020, which on occasion was even higher in comparison to the winning destinations (for example, Burggrafenamt\_W1 had a  $+9.7\%$  increase, while Burggrafenamt\_L1 a  $+15.4\%$  increase; Pustertal\_w1 had a  $13.4\%$  increase, while Pustertal\_l1 a  $24.2\%$  increase), the main feature of the winning destinations in comparison to the losing destinations in absolute and relative overnight stays is that the former had a higher share of domestic tourism already in the year previous to the pandemic than the latter. This underlines the assumption that the traditional structure of the source markets has an influence on the absorptive capacity of tourism destinations. They initiate absorptive mechanisms to slightly modify the distribution of the source markets, but their path dependency concerning their past structure inhibits a more extensive absorption of the repercussions of the shock: in this case, the diminishment of international tourism flows.

### 3.2. Website Analysis

The website analysis and the collection of additional information about the municipalities and the touristic offers revealed several differences between winning and losing municipalities. The former, in comparison, predominantly exhibit the following characteristics.

1. Winning municipalities have fewer residents (less than 1500).
2. There are two types of winning municipalities:

Type 1: They are presented as quiet, not very crowded, or even untouched destinations. This is expressed either by explicitly highlighting these facts or by not providing much information about the destination and a low degree of marketing activities.

Type 2: Highly professional marketing, targeting various guest groups (especially families), showcases the variety of the touristic offerings, as well as beautiful nature and rather relaxed activities, which are mentioned in text and shown in pictures, or a mix of more adventurous and more quiet offerings.

The winning municipalities seem to have or convey less emphasis on tourism, i.e., they are mostly not tourism hotspots. They focus mainly on the following target groups: family and children, people with an affinity for sports, couples, as well as elderly, and—which distinguishes them from most destinations with a more pronounced reduction in overnight stays—their advertising has a high degree of target group(s) related fit. Moreover, they offer alternative overnight accommodations to (more expensive) hotels, such as places for camping, apartments, vacation homes, or similar. The winning destinations also seem to tend to be lower priced than the losing ones. Having fewer residents, placing less emphasis on tourism, and offering a broader range of accommodation structures may attract guests who intend to avoid crowds and prefer quiet, less crowded destinations and accommodations.

Municipalities with bigger losses in overnight stays mainly have the following characteristics:

1. They are tourism hotspots, classic destinations known to attract large tourism flows.
2. While some have highly professional marketing, the websites of others are not attractive, and their marketing is not targeted and suggests they are only alternative quarters for nearby locations that are too expensive. Here, being a small destination may have a negative effect, especially in case of marketing mergers and shared web presences.
3. While nature and family are important in their marketing, tradition and events are also highlighted.
4. Some only focus on winter tourism.
5. Many are known to have a high number of regular guests from countries where travel bans were active.
6. Many target the high-price segment.

No differences could be found concerning positive or negative ratings and generally the quality of marketing or web presence.

### 3.3. Interviews

The lockdowns are described as existential and emotional shocks (Interviews 6, 7) for all major stakeholders of hotels covered here (owners, employees, guests); the situation itself was extremely unclear and chaotic for all concerned. Major internal issues were (a) costs, (b) use of time, and (c) employees. Covering costs was approached by navigating through possibilities for state aid (Interviews 5, 6, 7, 8, 9)—checking for applicability, applying for them, safeguarding the entitlement, and finding commercial possibilities for supplementing state aids when, for example, providing take away food was permitted. Many opted for using the lockdown time for renovation activities (Interview 6). Concerns were raised regarding the re-opening due to an increase in resignations of employees, opting for professions that have been perceived as being more pandemic-safe or having more regular working hours, also through professional retraining (Interviews 1, 6, 8). Keeping in steady contact with employees was described as highly important

(Interview 6). While staff are already sourced from other countries (Interview 8), this might also become more important in the future. Regarding external considerations, a re-orientation regarding target markets was started (Interview 6), and cancellation policies were adapted (shortened to increase trust) (Interviews 1, 6). Countries with a high number of people already vaccinated and the domestic market were seen as being more interesting for future marketing activities (Interview 6). The behavior of guests was described as peculiar in summer 2020: while many were satisfied with less service than usual and were observed to simply enjoy to be able to travel to a hotel (Interview 7) and increase their spending while on vacation (e.g., opting for the more expensive wines), other guests were even more demanding, expecting an excessive degree of attention (Interview 6). Moreover, sport activities seemed to be more important than before, just as spending time outdoors (Interviews 1, 2). While health-related activities seemed to be on the rise, hotels with a specific focus on health tourism (incl. rehabilitation) were also allowed to open in Austria except during the first lockdown in spring (Interviews 3, 5). However, the booking situation was (much) below average, and, as there was no required closure, there were different conditions for state aids (Interview 3, 5, 9). Guests complained about the reduced services due to closures of, for example, the spa and sauna areas to comply with SARS-CoV-2 restrictions (Interview 11), in addition to curfews and not having the possibility to receive visitors (Interview 10).

### 3.4. Summary of Results

Municipalities and destinations that comparatively lost more overnight stays in the summer of 2020 versus 2019 are cities, places known to be (rather expensive) touristic hotspots, those which have a higher dependence on international guests, and those with seemingly unaligned marketing activities. Cities are more densely populated, which might lead to a fear of crowded areas and subsequent health risks. Moreover, the gastronomic offer was limited due to official regulations. Destinations with fewer losses in overnight stays tend to be small, have an image of being rather untouched but offering a wide variety of activities for various target groups (always including families), as well as being affordable. Thus, while product design and offer are crucial, adequate placement and targeted promotion as well as reasonable pricing need to complement the package. Thus, the classic four Ps need to be considered and combined. As mentioned above, the 4P as well as the 7P model provide only a rough overview of aspects relevant for marketing and need to be more refined. Appendix A does so for the results of the findings of this paper.

In summer 2020, the package that customers found most attractive seemed to be geared toward products that appeal to audiences that value nature, more relaxed activities, or a wide variety in a more limited setting. Thus, product, place, and promotion are the most important elements of the marketing mix in terms of absorption mechanisms (see Figure 1), with more details provided in the Appendix A. Service (processes) was described as relevant by some guests. People, however, was rather seen as internal issue in the context of Human Resources and personnel retention. Physical evidence was analyzed on the websites regarding the content and pictures shown and had to be subsumed and related to the degree of professionalism in promotion.

## 4. Discussion

The SARS-CoV-2 pandemic heavily impacts global tourism [78,79], especially in regions which exhibit a high economic dependence of the sector. As a first reaction and stage of resilience, existing resources have to be employed to buffer and absorb a crisis impact [18–20]. This paper investigated the resilience of municipalities' tourism industry in North and South Tyrol during the SARS-CoV-2 pandemic during summer 2020. The principal motivation to focus on tourism is twofold: On one side, both regions exhibit a strong economic dependence on the tourism industry. On the other, tourism has been seen as positively contributing to regional economic resilience [80] also due to its inherent ability

to recover in a timely manner [81]. In this context, the paper is of interest to comparable regions on a global level.

Moreover, the paper expands current literature regarding the phases of resilience and regarding scale and scope on the destination level, as other studies, e.g., only focus on high category hotels [82–84], other organizational types such as restaurants [85,86] or tourism organizations [87].

Based on a mixed-methods design, the relative and absolute changes of overnight stays were investigated for six destinations—three in South Tyrol and three in North Tyrol, totaling 26 municipalities which were analyzed in-depth using additional data regarding countries of origin of guests, touristic infrastructure, etc. Furthermore, we conducted interviews, and the websites of the destinations were qualitatively analyzed. The results were linked to the marketing mix and the wider context.

In times of massive external change and uncertainty, strategic adaptation or transformation is discouraged if the direction of change is unclear, while a focus on existing resources [88] can be suggested. This approach becomes even more relevant if sudden shocks, such as the pandemic, have an overarching effect on tourism destinations, which are embedded in regional economies. Following the notion of Engineering Resilience, the timely response of individual actors, such as accommodation providers, supported by the tourism destinations, is vital in order to absorb the effects of the disruption and preserve the overall regional socioeconomic structure [80]. We examined the marketing mix and its effects on resilience in terms of absorptive capacity in this context. The findings show which destinations coped in a better way and link this to certain characteristics. This can be used within destinations to analyze the adequacy of existing resources and strategies for the current situation and future sustainable development. Aiming at resistance [89], the analysis of critical factors for absorptive capacity leads to insights for improving resilience for uncertain times.

Based on the analysis, destinations, as “coherent geographical region[s] with uniform identity and various tourism products” [90], were likely to experience more moderate losses during the pandemic when their offer included nature, health, and family-related activities. Family and health are values that gained in importance during the pandemic and could be safely provided for in nature- and outdoors-oriented destinations. Both North and South Tyrol have a broad offer of the latter, resulting in the resilience of many destinations. While catering to values (of the target groups) is a general suggestion for success in any business, a focus on those that are of highest relevance and crisis-resistant is advised for based on the results found here.

In addition, we found that in a pandemic situation, customer satisfaction may not completely depend on the marketing mix and its composition but can be overruled by what is legally possible (external dimension) and clients’ gratefulness for enjoying the opportunity of vacations as such, since these were long forbidden due to the lockdowns. Especially, the qualitative data showed that—at least in the short term—things are different from before: the product itself receives a higher status for the clients and satisfaction is reached quicker. Sustainable business models needed not to be very innovative, which, however, may change in the future [85]. Offer structures that seem sustainable at first sight—health tourism—which was allowed under certain conditions after the first lockdown—did not necessarily lead to the economic success of specialized accommodations due to the cancellations of clients and other requirements for state aids.

In the Appendix A, the findings and theoretical foundations are combined in a framework that summarizes key success factors mentioned in the literature (i.e., [39]). Filtering these using a client-centered focus led to the following facets and their elements: temporal aspects (season and weather), destination infrastructure (attractiveness, availability, accessibility), accommodation (demographic aspects, marketing mix, guest type, staff, cost structure). For the destination itself, the ideal configuration of the outlined elements depends on its geographical size, the revenue generated by tourism, as well as likely also the number of inhabitants and those working in tourism or related

branches. In the first stage of resilience (absorption), municipalities with a lower number of inhabitants were rather successful in the summer season in Tyrol, which may indicate that they are perceived as safer because they are less crowded, and therefore, a lower risk of infection with the SARS-CoV-2 virus may be assumed. Revenues and incomes result in taxes and economic stability but also define the starting points of over-tourism and overdependence on tourism.

The internal dilemma of planning for accommodation structures is characterized by the interdependence of cost structures, booking patterns, and personnel requirements. Depending on what is booked when by whom, strategic and operative personnel planning is possible, and costs are predictable. In a pandemic context, however, destination-external political decisions guide booking patterns. In case travel bans lead to a (massive) cut in booking numbers, contract specifications with suppliers and personnel determine the organization's leeway to cut costs and financial support by the government, if available. State interventions strengthen absorptive capacity and therefore engineering resilience. Thus, a balance is still possible, and an increased focus on the domestic market can enable stabilizing effects [91,92].

Our analysis provides a framework of resilience that allows for specifically investigating and differentiating destination characteristics in global health crises. The model might not only be applicable for the latter but also for analyzing destination attractiveness for health-risk-averse clients. While design, including nature, is rather place dependent, investing in wellness and family-oriented activities provides ways to increase the absorptive capacity in terms of resilience for most destinations, just as it leads to increasing the fit of the promotional activities. For a short-term oriented resilience, the offer would need to be in place before the occurrence of the shock. Adapting the portfolio might require more investment in promotion activities which needs to be balanced by adequate returns in the long run and thus needs to be carefully weighed depending on the estimated duration of the (health-related) crisis.

#### 4.1. Limitations

As highlighted throughout the paper, the reference number employed is overnight stays. However, depending on state aid, high losses may not automatically result in economic problems for the destinations in the short run. The amount may even be the reason for not opening a hotel (to decrease variable costs), which is causally connected to reduced overnight stays. Nevertheless, sectoral interdependencies and time may lead to different conclusions that need to be uncovered. Interrelationships can also be positive and increase a destination's internal sustainability, for example, by improving the local infrastructure and thus staying attractive for the local population, avoiding rural exodus, nudging innovation, reducing over tourism, and so on.

In addition, the reported renovations, together with our own cautiousness and lack of personnel, might have led to decisions to avoid working at full capacity in summer 2020, which would also make more pronounced reductions in overnight stays a strategic aim and not a loss. Requiring financial reserves, this may be more likely for organizations in municipalities with previously very high overnight numbers ('tourism hotspots'). Thus, during the first summer season within the pandemic, the image as a tourism hotspot seems problematic based on the data, but the reasons and developments need further investigation.

We empirically studied two regions (North and South Tyrol) with specific cultural, historical, and (crisis-related) regulatory peculiarities. Thus, a generalization of the findings for regions with very different characteristics and preconditions must be viewed critically. However, being regions highly reliant on tourism and thus pressed to react with few immediate possibilities, the paper offers important insights into first stage coping successes.



#### 4.2. Future Research Requirements

There are some suggestions in the literature regarding pandemic-induced changes in the tourism sector, especially related to the increased shortage of personnel and importance of human resource management (see, for example, Baum et al., 2020), focus on digitalization [93,94], higher importance of hygiene [93–96] as well as health and well-being [94]. As expectations of managers regarding required measures [93,95,97], these elements cover all 7Ps of the marketing mix, and their impact needs to be investigated over time. This is necessary, as our results indicate that their relevance may depend on the phase and type of resilience researched and location [92,98]. As regional efforts may play a vital role [41], destinations with less dependence on tourism need to be investigated.

In this paper, we focused on municipalities with a very marked focus on tourism and as a more pronounced impact of the pandemic could be expected there, with a higher pressure to react. While less touristy municipalities are likely to experience fewer losses in overnight stays, they and their ecosystem might not be completely self-reliant but rather be impacted by interdependencies. Moreover, they might have more potential to increase the number of overnight stays and/or might be more sought after because they are less populated and thus considered safer by tourists—fewer people indicate a lower risk for infection [99]. Nevertheless, distance rules require more spacious areas within accommodation structures, potentially favoring higher class hotels. Future research should thus also incorporate tourist motives for post-pandemic destination choice and differentiate between sources utilized for information. Campsites offering more luxury and high booking flexibility might become much sought after. How different accommodations promote their offers and whether, for example, they try to compensate for or add to the destination marketing professionalism, is interesting in this context. As this paper has shown, a concise marketing mix and corresponding client communication can alleviate pandemic-induced economic shocks.

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## Appendix A

The framework below summarizes the findings. In addition to briefly describing the elements, they are related to a pandemic situation. These are described in more detail below in the table. The extensiveness of the framework allows for thematic analysis and for detecting the pandemic specifics, which addresses the research gap.

**Table A1.** Framework.

Facet	Description of Facet	Facet Element	Description of Facet Element	Relevance in a Pandemic Situation
Infrastructural Factors: Destination Infrastructure	Contextual factors influencing the touristic potential regarding a destination's infrastructure can be subdivided into three aspects: its attractiveness, availability, and accessibility.	Attractiveness	The general attractiveness is defined by the image of the destination, which is dependent on the number and type of tourists per year/season and the touristic ecosystem available: shopping possibilities, tourism infrastructure (bars, restaurants), leisure facilities (golf court, amusement park, horseback riding facilities . . . ), and other attractions or regions to visit in the proximity. It is important to note here that general attractiveness might not automatically lead to a high number of overnight stays in case the number of secondary residences is high.	The attractiveness of a destination is connected to its perceived health-related safety level in a pandemic situation, leading to a higher demand of overnight stays in less populated rural areas. In addition, destinations providing outdoor activities, especially for families, were well booked. As children suffered intensively during the lockdown, families might have tried to compensate the negative effects by purposefully opting for these destinations.
		Availability	Availability is characterized by the size of the destination (number of beds in the required categories) and temporal aspects. Some destinations are tightly connected to specific activities only possible in certain seasons and/or weather conditions.	During a pandemic situation, availability depends on which accommodations are not (voluntary and involuntary) closed and which types of activities are not banned. Medical rehabilitation and regeneration programs, for example, were allowed in Northern Tyrol except during the first lockdown.
		Accessibility	The accessibility of a destination refers to how easy it can be reached, from where, and (explored) by whom. This factor refers to classical travel infrastructure but also to the specific requirements of guests with special needs.	In a pandemic context, accessibility depends on travel bans based on regional classifications of dangerous areas.
Accommodation Level Factors	On the accommodation level, we distinguish three groups of stakeholders: owners, employees, and clients (guests, tourists). While the factors that influence resilience in a crisis such as a pandemic are interdependent, some are of more relevance for a specific group, and some are generic.	Demographic aspects	Demographic aspects are generic and comprise size, age, category, location, physical accessibility, and type of booking accepted (online/calls/platform/ . . . ).	In the pandemic, rather remote areas were preferred, which is most likely because they are considered safer. In addition, camping, which provides the highest possible flexibility of quickly leaving a place, was more popular.

Table A1. Cont.

Facet	Description of Facet	Facet Element	Description of Facet Element	Relevance in a Pandemic Situation
		Marketing mix The most important element of the marketing mix (price, product, promotion, placement, people (employees), physical surrounding, and process) is the type of the offer.	The offer design is of major interest for the clients, but it also needs to be staffed with the right people and profitable, thus attractive enough. PR activities promoting the offer need to take specifics regarding target groups into account and must have a certain degree of professionalism. In North and South Tyrol, bus tourism, sports tourism (incl. training of teams), health tourism, individual tourism (family, couples, tourists/business travel), business travel (incl. further education/seminars), and city trips are of relevance. Depending on the focus of the hotel, it was more affected by the pandemic regulations.	During the pandemic and partly even the hard lockdowns, specific health-related tourism was allowed. However, since accommodations with this specific offer were not forced to close, they also received no state funding. Regulations also allowed food delivery offers that could generate extra income for hotels with sufficient kitchen facilities (and guaranteed employee safety). The classic four Ps seem to be the most relevant in the absorption state, with price slightly less important than the other Ps.
		Type of guest	Depending on whether an accommodation relies on regular guests or not, their typical countries of origin, socioeconomic status, needs, and travel motives, the marketing mix needs to be adapted	In a pandemic context, fear may be a strong motive to decide against traveling, making emotion management highly relevant in marketing efforts. This could be addressed, for example, by stressing the hygiene rules that are followed or by highlighting the availability of self-catering apartments. However, there may be a higher homogeneity in simply being happy to be on holiday. Adapting cancellation strategies can help guests feel safer.
		Staff	As tourism is very service-centered, trained staff is vital. Thus, the availability of (qualified) employees in the region, their attraction, training, and retention are vital, especially if local personnel is required. Otherwise, staff need to be attracted from other areas and countries.	Mentioned as (potential) shortage factor in a (continuing) pandemic situation, and as a group highly impacted by forced closures. Employee retention strategies are highlighted.
		Cost structure	Resilient economic success is only feasible with a sound cost structure. In tourism, this depends very much on the level of fixed costs (infrastructure, personnel, long-term contracts with suppliers), which is determined by the general offer design.	In a pandemic context, governmental financial support, insurances, and reserves can be used to balance reductions in cash flow. All factors that increase the level of organizational control over the cost structure, booking patterns and personnel requirements, thus alleviating the dilemma of planning, lead to higher resilience.

Due to the focus on the summer season, temporal aspects proved to be largely irrelevant in this paper.

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