IMPACT OF COVID-19 PANDEMIC ON CULTURAL HERITAGE IN EUROPE

SHARE project

September 2021 – August 2022

Dr. Hai Nguyen

Prof. J. Andres Coca-Stefaniak

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Outline

1. Impact of COVID-19 pandemic on cultural heritage

2. Intentions (and actual behaviours) among visitors

3. Our research in SHARE

   a) Case studies

   b) Survey

Impact of COVID-19 on Cultural Heritage

Impact in numbers (1)

- **3.9 million** deaths and **179 million** infected worldwide

- **90%** of UNESCO World Heritage sites closed of partly closed in 2020

- **Europe** particularly vulnerable in terms of GDP

Jobs at risk:
European tourism sector and Covid-19 pandemic
Job loss risk assessment in tourism sector in the EU

- Very high risk
- High risk
- Average risk
- Lower risk

MT   CY

Source of data: United Nations Conference on Trade and Development (2021), UNWTO (2020) and UNESCO (2021)
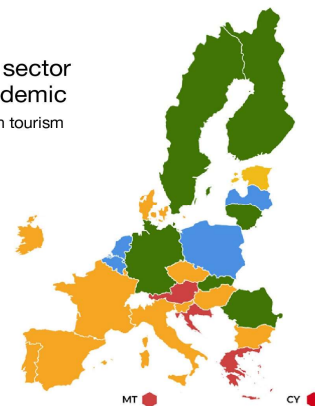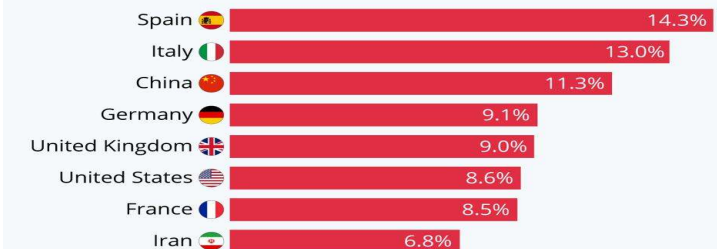
Impact in numbers (2)

- **74% decline** in international tourist arrivals (worldwide) in 2020 compared to 2019

- **Nearly 50% of experts** see a return to 2019 tourism levels in **2024 or later**

Source of data: United Nations Conference on Trade and Development (2021) and UNWTO (2020)

Who's Most Vulnerable to COVID-19's Impact on Tourism?

Total contribution of travel and tourism to GDP of selected countries in 2019

| Country	Percentage
Spain	14.3%
Italy	13.0%
China	11.3%
Germany	9.1%
United Kingdom	9.0%
United States	8.6%
France	8.5%
Iran	6.8%

Incl. contributions from industries that deal directly with tourists (e.g. hotels, travel agents, airlines, restaurants) plus tourism's indirect and induced impact
Source: World Travel and Tourism Council

Forbes   statista

Intentions
(and actual behaviours) among visitors

To visit or not to visit … in times of risk

Studying visitor behaviour (intentions) during a pandemic
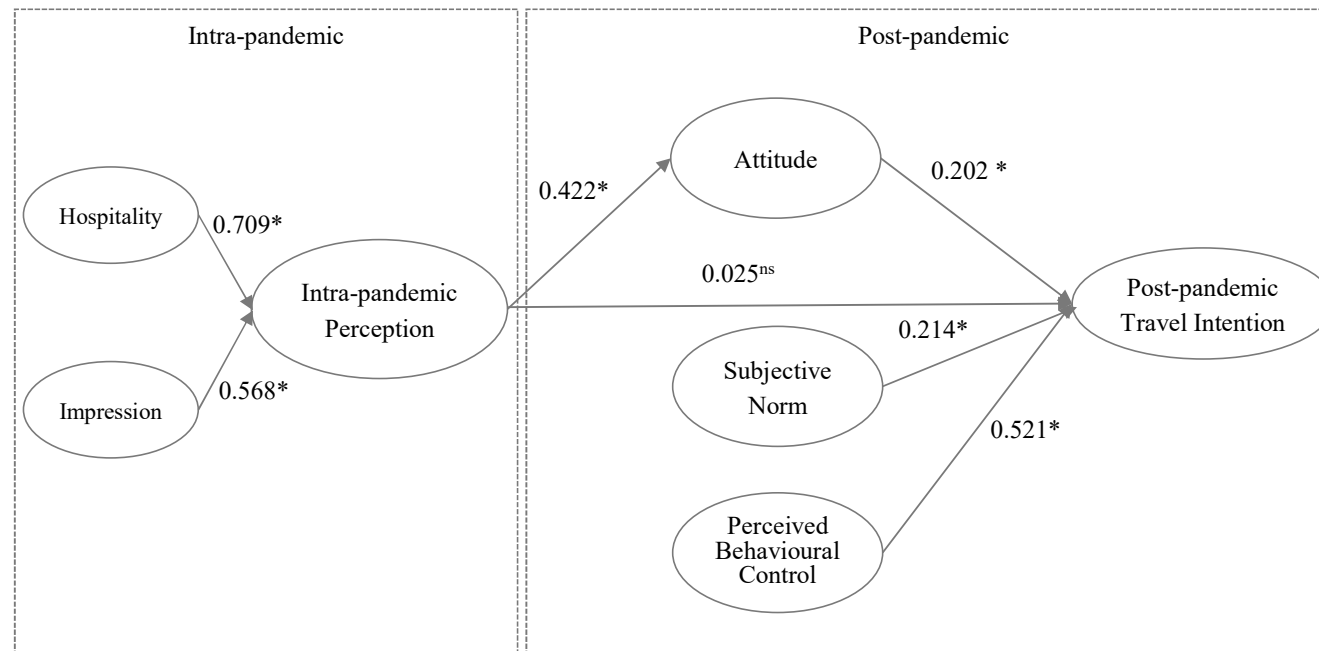
Source: Li, J., Nguyen, T.H.H. and Coca-Stefaniak, J.A. (2021), "Coronavirus impacts on post-pandemic planned travel behaviours", *Annals of Tourism Research*, https://doi.org/10.1016/j.annals.2020.102964

However, Intended behaviour ≠ actual behaviour

Most COVID visitor behaviour research has been on **intended behaviours**

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European Union
European Regional
Development Fund

Latest COVID visitor (<u>actual</u>) behaviour research

- ## Post-pandemic (actual) behaviours – China's Golden Week Holiday (Oct 2020) findings

  - **60%** said they would travel but only **50%** actually travelled

  - **Level of education and household income** - key factors

  - **36%** of travellers were from smaller households

  - **Only 27%** reduced the duration of their holiday

  - **50%** travelled by car instead of flying or train travel

Source: Li, J., Nguyen, T.H.H. and Coca-Stefaniak, J.A. (2021), "Understanding post-pandemic travel behaviours – China's Golden Week", *Journal of Hospitality and Tourism Management,* https://doi.org/10.1016/j.jhtm.2021.09.003

What our research will involve

- **Case studies** and **survey**

- **Case studies –** focus on **specific** (3 per country) heritage sites, share interventions, what worked and **observed (actual)** behaviours

- **Survey –** (online) provide breadth (**any EU country**) and help us **predict** what to expect next

Case studies

What do we want to find out? (suggestions)

- What **COVID restrictions** applied to each country in the project?

- What COVID measures were put in place to **manage visitors** to heritage sites?

- **How did visitors behave** in and around heritage sites over the summer of 2021 at specific SHARE project locations?

- **What worked** and what did not work so well?

- How has COVID affected the **sustainability** (economic, social and environmental) of SHARE project heritage sites?

- How was **seasonality** affected by the COVID pandemic? Could the **blue economy** be the answer?

- How did **access to funding/finance (or lack of)** affect heritage sites, small businesses linked to visitors and tourism destinations in general?

- What was the effect of the COVID pandemic on **the policy framework and policy making** in visitor destinations, particularly as regards the recovery from the pandemic? Indeed, what were the **priorities of policy makers in tourism** during the pandemic period?

What else should we investigate?

Survey (online)

Proposed content of the Questionnaire

Target respondents

All potential visitors (including both residents and non-residents)

Section A. General travel

➢ Past travel behaviour: during the pandemic
  • Frequency
  • Type of transportation
  • Type of accommodation

➢ Future travel behaviour: next months
  • Travel Craving
  • Travel intention

Note: Not all these topics/questions might be included, it depends on the overall length of the questionnaire

Proposed content of the Questionnaire

Section A. General travel

➢ Risk perception
- • Perceived susceptibility to COVID-19
- • Perceived severity of COVID-19
- • Attitudes towards risk avoidance behaviour
- • Trust
- • Standardized safety measures

➢ Risk avoidance behaviour *
- • Passive: Travel avoidance
- • Active: Self-protective behaviour

The proposed list of risk avoidance behaviours is provided in the notes.

Proposed content of the Questionnaire

Section B. Cultural/heritage attractions

➢ Past behaviour/experience: during the pandemic
  - Frequency
  - Type of visited attractions
  - Information/knowledge
  - Communication
  - Engagement

  - Atmospherics
  - Visit duration
  - Feeling of safety/anxiety
  - Satisfaction

  Other behaviour/experience?

➢ Future behaviour: next months/summer
  - Cultural/heritage attraction craving
  - Cultural/heritage visit intention

Note: Not all these topics/questions might be included, it depends on the overall length of the questionnaire

Proposed content of the Questionnaire

Section B. Cultural/heritage attractions

➢ Risk avoidance behaviour
- Passive: cultural/heritage attractions visit avoidance
- Active: Self-protective behaviour

❖ Within indoor attractions
❖ At out door attractions

Your contributions?

Maybe relevant to your safety measures or your observations during the pandemic

* The proposed list of risk avoidance behaviours is provided in the notes.

Proposed content of the Questionnaire

Part C. Demographics
- Country of residence
- Gender
- Age
- Education
- Income
- Employment status
- Family status
- COVID-19 vaccination status

Thank you

For more information, please contact:

Andres Coca-Stefaniak - a.coca-stefaniak@gre.ac.uk