

Tourism overview in Rome and prospectives after pandemic

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Abstract

Geography could be read as a specific way of looking and acting on the world, in which the elements of space, territory and landscape involve expression and identity of the populations. In particular, the landscape declined on the anthropic dimension refers to the internal relations of societies, to the ways of using the environment by the man.

The impact of man on the territory has contributed to the creation of a cultural heritage that today is an essential part of the landscape. In the same way, the impact of man has distorted the natural landscape and, at times, disfigured it. Indeed, the rapid path of information technology development creating millions of virtual connections between people, industries, regional and international communities is fundamentally changing the way governments, businesses and consumers operate, and also the relation between man and territory.

Thus, starting from modernity, innovation and information the reflection moves on the innovative way of communication that try to integrate identity and innovation in the storytelling of a different dimension of the territory and landscape involving the different expressions of emotions.

Keywords: Tourism, Pandemic, COVID-19, Cultural Landscape, Heritage, Territory II. The focus of the study

The sudden tourism crisis, following the COVID-19 emergency situation, has highlighted some of the problems and shortcomings related to the Italian tourism offer and the tourism management of the territories – i.e. cases of undeclared tourism linked to a too seasonal tourism system and a poorly qualified and specialized offer; an offer proposal that is not adequate to European and global standards with reference to the level of ICT, to the digitization of the tourism system both on the tourist side and on the entrepreneur side; the excessive consumption of the territory dictated by an unbridled presence and concentration of tourists in the destinations, etc.-. In light of this, the research opens a reflection about the overtourism and mass tourism in Rome. Until the outbreak of the coronavirus health crisis, tourism represented a major sector for the Italian economy, occupying leadership positions in the ranking of tourist flows in Europe and around the world. In this scenario, the global tourism crisis drastically involved Italy. It is clear that since tourism is a dynamic phenomenon, able to involve the most varied economic sectors, it has had a significant impact on Italian society and the economy as a whole.

Certainly, the policies adopted in the Italian tourism system in the last decade have turned a strong interest in the growth of tourism in various Italian territories; nevertheless, even before the pandemic crisis, the Italian tourism system appeared very fragile. For example, the loss of competitiveness recorded by Italy in recent decades could be read as a symptom of structural cracks, weaknesses and crises in the tourism system rooted in the Italian fabric (Bozzato et al., 2020; Celant, 2017).

Thus, if it is true, that in 2019 Italy was first in Europe for the number of accommodation facilities and second only to France for the number of beds. The French tourist offer, however, is mainly based on camping areas (2.8 million), while Italy is at the top of the ranking in the European Union with regard to beds in hotels and complementary businesses. In fact, Italy has 2.3 million beds, surpassing Spain which has 1.9 million. While as regards complementary businesses, Italy has 1.6 million beds, surpassing France which has about 1 million. Therefore, as regards the hotel offer alone, Italy holds about 16% of the entire European hotel offer, in competition with Spain which wins second place (EUROSTAT, 2019; ISTAT, 2019). In particular, according to ISTAT data (2019), tourist presences in 2018 more than doubled compared to the previous year in 4 and 5-star Italian hotels, while they are stable in 3-star hotels and a sharp decline in 1-star and 2 stars hotels (Aa.Vv., 2019).

It is clear that the Italian tourism system boasts a remarkable accommodation capacity that brings out the competitiveness of Italy in the European and world scenario. According to EUROSTAT (2019) and WTTC (2020) data also in terms of tourism impact on GDP, Italy is at the top of the European ranking as it contributes to GDP with direct, indirect and induced tourism activities with approximately 232 billion (13% of total GDP), exceeding in 2018 the European average of direct impact of tourism on GDP with + 3.9% compared to the European average of + 3.4% (Unioncamere, 2019; EUROSTAT, 2019; Banca d'Italia, 2019; WTTC, 2020).

The significant economic impact of tourism on Italian GDP is confirmed by the positive trend of the balance of payments which in 2018 recorded a positive net balance of 16.2 billion euros, confirming a growth of about 11% compared to previous years. Therefore, if the tourist balance of payments in France and Germany is mainly supported by domestic tourism; Italy, Spain and the United Kingdom, on the other hand, benefit from the contribution of foreign travelers. In fact, an important contribution, in Italy, is given by the expenditure of foreign travelers which in 2018 was equal to over 40 billion euros, almost double compared to the contribution of domestic tourism (about 25 billion euros), despite the number of presences of residents in Italy amounted to around 80 million nights, recording a significant increase compared to the previous year (+ 19.5% from 2017 to 2018). Yet, although it is now clear that tourism plays a role of singular importance for Italy, it should be noted, first of all, that the data on tourist flows, which place Italy on the podium in the statistics of international arrivals and presences in European and world level, they are concentrated in some areas of the country and not evenly distributed throughout the territory. According to ISTAT data from 2019, in fact, there were 123 million international arrivals in Italy in 2018, of which more than half are concentrated in the main cities of art. In first place is Rome with 29 million visitors, followed by Venice and Milan with about 12 million visitors each and Florence with over 10 million visitors.

Nevertheless, the data shows a clear delay compared to competitors. For example, considering that the digital revolution has had a strong impact on the tourism sector at every stage, from the organization of the trip to the post-travel phases, and that there is a strong increase (+ 7.7% per year) in the number of young travelers 25 and 34 years old and considered digital natives (ISTAT, 2019; Banca d'Italia; 2019; Unioncamere, 2019), it is essential to embrace a policy aimed at the technological renewal of tourism companies to make tour operators competitive Italians. The acquisition of technological innovation and tools for the digitalization of companies, both in the context of internal management of the company, and to foster a direct relationship with the tourist - consumer, is undoubtedly made more complex when the context of Italian enterprises is mostly characterized by family-run small and micro enterprises. For this reason, and due to the dominant role that small and medium-sized enterprises have in the Italian panorama, the weight of hotel chains on the national territory is reduced, as is the presence of large operators in the various segments of the supply chain. The spread of family-run small and micro enterprises in the area involves, among other things, a lack of differentiation between the roles of owner and manager of the company, thus marking a further criticality in the comparison with the main European competitors, in particular, with reference to the level of education of workers which is lower than the European average. In Italy, in fact, only 15% of those employed in hotels are in possession of a qualification higher than the secondary diploma (three-year and / or master's degree), a value significantly lower than that observed in one of the main competitors such as France which it counts about 33% of graduates in hotels (Foundation for Subsidiarity and CRISP, 2019).

In terms of supply, in particular with reference to the number of accommodation facilities and beds, in fact, Italy reaches leadership positions at the European level, yet, the gross utilization

index of hotel facilities is among the lowest in European level (33.7% in 2017). Furthermore, despite the annual growth of flows, it is also good to consider some indicators such as the average permanence continue to decrease. Not only. The sustained increase in the supply of Italian beds and accommodation facilities must be accompanied by the submerged tourist. It must be considered, in fact, that the Italian accommodation offer is actually wider than the 126 thousand accommodation facilities (hotel and non-hotel) surveyed by ISTAT in 2019, since there is a submerged accommodation that is not registered and, consequently, it shows a scenario that includes only partially registered accommodation.

Analyzing the data of tourist flows, in fact, one must take into account the undeclared that brings out countless cases of illegal activities spread throughout the Italian territory, both with reference to accommodations which in this sense do not allow to have an accurate count of arrivals, tourist attendances and balance of payments, both in terms of lack of professionalism of tour operators, who without adequate training and qualification risk providing a service that is inadequate to the expectations of tourists.

Observing the data of a continuous growing trend in tourist flows, a dichotomy in the Italian territory is highlighted between the conservation and promotion of tourist resources, from which the debated theme of overtourism emerges. The presence of tourist flows in a destination, therefore, can in some cases be positive for the growth and development of the territories, in other cases, however, it can have even devastating impacts for the resources of the territory and for the respect of the local population. In the latter case, the scale of the impact depends on a multiplicity of factors, such as, the number of arrivals at the destination, the seasonality of the destination, the development of the economy and local infrastructures, the relationship between tourists and residents. think of the case of Venice which has about 73 tourists per resident (Airbnb, 2018)

The phenomenon of tourist overcrowding, in fact, is a source of growing concern especially for the more urbanized areas, for which it generates not only problems of tourist pollution and environmental stress linked to the safeguarding the artistic and environmental heritage, but also problems related to infrastructure, the urban fabric, and the image of the destination. Therefore, the phenomenon of tourist overcrowding can be a symptom of the tourist destination's inability to manage the reception of tourists due to the lack of adequate tools, policies and governance strategies to support the entry of tourist flows both from the point of economic, social and environmental point of view. Therefore, future tourism policies according to the WEF (2019) must be aimed at designing strategies that make it possible to combine tourism growth with development and territorial sustainability.

Furthermore, from the studies and the data highlighted, a clear uneven distribution of expenditure and tourists flows on the national territory emerges. In fact, among the main factors capable of significantly affecting the flow of travelers there are obviously the climatic conditions, which contribute to delineating the seasonality of a tourist destination. In particular,

the high specialization in seaside tourism weighs heavily on the southern area of the country. In consideration of the fact that the main causes of seasonality are traced to natural, institutional and social phenomena, which cannot be modified by the tourist destination, it is the task of policy makers to focus on managing the other factors, which do not depend on climatic conditions and which are able to influence the tourist's choices, with the aim of achieving a more equitable distribution of visitors throughout the year (Hylleberg, 1992). Therefore, through a hybridization of the tourism product, it could be possible to focus on the cultural factor to promote organized visits to multiple sites and contribute to the seasonal adjustment of tourist flows. Therefore, the role of policy makers is fundamental in maneuvering and stimulating within an integrated strategy a path of social tourism that is able to guarantee the tourist control of territorial and environmental sustainability, together with an offer of comfort and quality.

It is not surprising, therefore, if the tourist demand has led, in recent years, to less positive results than in the past, despite the fact that there has continued to be an increase in the flow of arrivals compared to previous years. In particular, the data of the main national statistical institute (ISTAT) showed a growing number of arrivals in the Italian tourism system year after year until 2019. While the flows of arrivals increased, the number of presences decreased and showed a first fragility of the tourist offer system dictated by a continuous lowering of the average stay with a consequence in terms of higher economic and social costs for entrepreneurs and tourist destinations and a loss of competitiveness on a global scale. Therefore, the linear path of quantitative growth in the number of tourists has produced the illusion of solidity (Bozzato et al., 2020) which led to the delineation before the pandemic crisis of a single possible scenario of global growth of the tourism market by the main world and national statistical institutes (Cocco, 2020). This scenario therefore underpinned the stability of a system, which, on the other hand, already showed deep-rooted criticalities. Nowadays, in the midst of the health emergency, the structural weaknesses of the tourism system are exposed. Nevertheless, at first glance, observing the cities “emptied” of tourists, the pandemic seems to have almost resolved, apparently, some of the most long-standing problems of tourism, which obsessed geographers until last year – i.e. overtourism – (Cocco, 2020). Thus, it appears clear that considering the pandemic as an opportunity would certainly be forced, in fact, tourism and pandemic cannot coexist.

The crisis linked to the pandemic, in fact, has highlighted some of the problems and shortcomings linked to the Italian tourist offer and to the tourist management of the territories contributed to make scarce the competitiveness of the territories. In particular: cases of submerged tourism and unauthorized workers and not qualified offer in terms of training and professionalization; an offer context that is not adequate to world and European standards with reference to the level of information and technological communication, to the digitization of the tourism system both from the tourist side and from the entrepreneur side; an excessive consumption of the territory dictated by an unbridled presence and concentration of tourists in the destinations; a downward flattening of the quality of the offer in highly seasonal

destinations; a lack of cooperation between small and micro businesses which represent over 90% of the tourism businesses in the Italian system; the absence of local systems and territorial networks with an “artisanal” management (Ferri, 2016, p. 88) and an entrepreneurial mentality that is too often myopic; the Italian tourism system continues to show a lack of homogeneity: cities lose large flows of visitors compared to the past, seaside and mountain resorts - with particular reference to the summer 2020 period - are overcrowded, thus aggravating the already usual problems linked to seasonality of places, while small villages and rural areas still remain unexplored, and even where there are some pioneering tourists, small villages are not always ready to host visitors, due to a lack of services, accommodation facilities and tourist activities (MacCannell, 1973). (Cocco, Brogna 2020). In a nutshell, the sudden paralysis of the tourism system has highlighted the many unresolved problems in the Italian context, and at the same time, has contributed to generating a real collapse of the system, due to inadequate and, in some cases, unavoidable, tourism management policies. In light of this and with a view to proposing a restart and a redesign of the tourism system, it would be appropriate to reorganize the processes and redesign a system and a tourist offer that, in addition to intercepting and exploring the digital in all its forms, is projected to raise the awareness of tour operators towards sustainable, responsible, accessible and inclusive tourism (Cocco, 2020).

In other words, the COVID-19 pandemic seems to have increased the structural weaknesses of the Italian tourism system, and even where the criticalities seemed to have disappeared (i.e. overtourism and mass tourism), it emerges that structural weaknesses continue to survive albeit in different places (i.e. the new overcrowding is in destinations different from the main cities). In this regard, in view of a future reprogramming of the tourism system, it should be understood whether the flows that have crowded destinations such as mountain or seaside resorts have been transitory flows or whether these flows hide a new trend in future tourism demand, to avoid overtourism and mass tourism. Certainly, the reprogramming of the tourism system and territorial governance in a pandemic and emergency context that makes demand even more unstable is not a simple task; in any case, to avoid the consumption of territorial resources it may be necessary to redesign a safe and quality tourism system through:

- i) higher education. It is not possible to redesign a tourism system with unskilled tourism workers, but the training is long and expensive, so it cannot easily be supported by entrepreneurs in the post-pandemic period, especially considering the preponderance of small and micro-sized entrepreneurs in Italy;
- ii) a safe, sustainable, responsible, accessible and inclusive product. Destinations are not always ready to attract flows in the low season; yet, the exodus towards second homes and smart working could be exploited to repopulate the territories in the mid-low season which would help redesign a range of services in the low season also for potential tourists;
- iii) the digital experience as a new communication tool for unexplored places. Promotion through digital could make known unexplored territories and places in the most hidden cities,

for example by exploiting the spread of digital experiences, digital acceleration and the reduction of the generation gap that occurred during the COVID-19 pandemic (Cocco, 2020), to intercept new tourist targets.

iv) the enhancement of local professionals. For example, an enhancement of the young destination stakeholders could favor the introduction of an approach to tourism based on higher education, on the sustainability of places and landscapes, respecting residents in a perspective of responsible and inclusive tourism based on synergy of territorial actors between the various destinations.

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