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Skills for promotion, valorisation, exploitation, mediation and interpretation of European Cultural Heritage

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Experience tourism and new tourism dimensions post Covid

CHAPTER ONE: Main tourism trends post Covid-19

Aim of this sub-unit is, firstly, to define experience and experiential tourism as tourists themselves perceived it, providing operative indications for the creation of experiences, and secondly to outline how COVID-19 pandemic will impact on experiential tourism trends. In particular, we will refer to a recent survey conducted by CISET to understand what tourists define as “experiential”, who experiential tourists are and which kind of experiences are more requested, comparing the results with other international researches and academic literature.
We will discuss the effects of the COVID-19 pandemic, reflecting on how the changes might affect specifically experience tourism.

From a quantitative point of view, outlooks are cautious and most experts do not see a return for international tourism before 2023. The recovery scenarios designed by UNWTO - World Tourism Organization, point to a return of international tourism to pre-pandemic levels into two and a half to four years and this will depend on the pace of the vaccination rollout, the coordination among countries on travel procedures and the economic consequences of this situation. From a qualitative point of view, it is difficult and uncertain to devise long term implication. Potential changes in behaviors are a function of the duration of the pandemic itself and the pandemic-related economic implications.
Some trends can be expected in the short-medium period to drive the recovery, like a preference for domestic tourism or known and trusted destinations and a preference for last-minute booking. This will be fostered by rapidly changing regulations in travel conditions, often communicated with a short notice. A preference for open-air activities and nature-based products are also expected to continue, while the recovery for urban destination will be longer.
Different studies and markets analyses point out some trends that will have a longer term impact. The majority were there even before the pandemic, even if are expected to be accelerated by it. The main trends that are expected to impact on tourism, according to different international studies, are: digitization, further enlargement of economic gaps, a stronger attention (but also a polarization in the attitude) towards sustainability, a new focus on health and safety.
Digitization for example, is expected to be accelerated with a more pervasive use of automation, contactless payments and services. Virtual tours, Chatbot or self-check-in/check-out have been implemented by firms to create safer services for consumers and that, on the other hand, brought benefits to firms in terms of improving working processes and procedures.
Safety and hygiene will be the first priorities when selecting destinations and activities. People are likely to prefer ‘private solutions’ to limit physical contact with strangers and feel safer. The research for “private solution” will enforce the personalization trend that was leading the tourism sector before the crisis and that can be enforced also through digitalization.

On the other hand, the economic situation will bring to a polarization and an increased inequality between consumers. Employees who were able to work from home and have maintained jobs and income, accumulated savings. On the contrary, other employees or entrepreneurs lost their jobs (and therefore income). According to McKinsey Global Institute, the recovery will depend in the near-term on high- income households and in particular on older and richer segments.
These trends are expected to impact on the evolution of tourist flows in general, but experiential tourism has some particular features that should be taken into consideration like the strong importance of the emotional dimension and of relationships between tourists and experiences' providers.
"Experience" and "Experiential" have become two widely used words in the tourism sector, but there is no clear and shared definition of what these words mean. They seem a marketing label used to create more appealing descriptions for products' promotion. What does it really mean and entails, however, designing and living tourist experiences?

CHAPTER TWO: What tourists mean by experiential tourism

CISET conducted a research in 2019 trying to understand what tourists themselves perceive as being experiential though a survey conducted with an online questionnaire.
As the aim was to understand what tourists defined "experiential", participants were asked if they took part in any experience or experiential activity during their last vacation and if so to describe it.
What emerged is that participants described as experiential a unique activity, organized in a non-touristic place, that allowed them to discover local traditions with local people. Uniqueness, discovering local tradition and doing something emotional have been evaluated as the most relevant items for choosing an experience.
Different studies underline, in fact, how people do not want to act and feel like a tourist while on vacation: they want to live the place like a local or like an insider. For this reason, they search for places out off the beaten tracks - that means places not completely modified by tourists nor adapted for tourists' needs, but rather, lived and attended by residents. The contact with the local community is also important, as tourists perceive to have a direct experience with local culture, traditions and the way in which residents live.
This form of tourism however is different from "responsible tourism". As the survey results highlight, the relationship with the local community aims at providing a unique and authentic visit but "sustaining local communities" is not a relevant item for this segment, as it would be for responsible tourists.
Making something that just a few people did, makes the perceiving of the experience more unique. Experiential tourists search indeed for less-known destinations or less known attractions of well-known destinations.
We also tried to understand the typology of experiences that are requested the most. Experiences related to art and culture, enogastronomy and nature-based activities are the most requested, as confirmed also by Airbnb and TripAdvisor's insights.
To better understand which kind of activities participants were referring to, we asked them to describe the activity they took part in.

Regarding art and culture, a vast diversity of experiences has been cited: from taking part at a cultural Maori performance in Australia to a dancing class in Argentina, from a music workshop in a pub in Ireland to a workshop about paper in Italy. Experiences related to craftsmanship are interesting for the urban environment. In this typology, respondents indicated activities like a Carving workshop in Bali or an Old Celtic crafts workshop in Ireland. Furthermore, a respondent from America reported her visit of the 9/11 memorial in New York, underlining the importance of the emotional level in the creation of memorable experiences. This - the emotional dimension - lets us reflect on the concept of "experience". Pine & Gillmore - the fathers of experience economy, as others researchers, Turner, Kim and Ritchie, Pearce and Wu – link the experiences to memory, defining them as any memorable event that engages intimately the consumer in the very act of consumption. In their view, experiences are based on the creation of memorable events for customers and "memory" becomes the product of the experience itself. At the same time, other researchers - like Knobloch, Robertson and Aitken - underline the importance of the emotional dimension in memory creation. Also market research confirm that people want to travel on a deeper emotional level, searching for activities and events that remain as traveling souvenirs. The survey's results highlight how the importance of the emotional dimension is valued and recognized by customers.

Taking these experiences as an example, we can observe that tourists' involvement in the activity is a key element for the set of experiences, as they are not passive viewers but rather active participants. This is widely confirmed by different market and academic researchers.

In general, experiences were based on a high level of consumers' participation and a medium-high level of contact with the local community. In particular, it can be observed that experience related to art and culture required a higher level of contact with local people with a more variable level of participation in the activity.

Searching for unique non-tourist experiences, tourists tend to self-organize their vacation. Independent travelers look for information mainly online, through blogs, or offline, asking friends and relatives. When planning their vacation with a tour operator, they choose local and specialized ones with tailor-made proposals to be customized according to their needs and interests. As underlined by a research in the USA market, most of the time small and local tour operators are preferred to large - national or international – firms.

Another interesting result emerging from the survey is that mentioned experiences play an important role in the decision-making process: for almost half of the respondents, the experience was the main motivation or one of the main motivations for destination' choice.

CHAPTER THREE: Experiential tourism in the post COVID-19 scenarios

Given the features of experiential tourism as described above, how will the pandemic impact on it?

In the first part of this contribution we introduced 4 mega-trends: digitization, economic polarization, a stronger attention (but also a polarization in the attitude) towards sustainability, a new focus on health and safety. Each of them is expected to affect experiential tourism.

As for health and safety, this will possibly have less implication for experiential tourism than for other kinds of tourism, as experiential tourism is based on personalization and tailor-made activities. Experiential tourists in fact, prefer travelling in couple, with friends or family rather than in organized groups and for this reason experiences are usually organized and proposed just for individual or really small groups. The challenges here will concern the relationship between tourists and residents, as human contacts play an important role in the creation of memorable experiences. In many cases, the emotional dimension is strongly related to the relationship between tourists and experience provider. In addition, we can expect open-air experiences to be preferred to indoor experiences. Safety would play an important role not also in the destinations' choice, as a place where the risk of infection is low could be preferred to high-risk destinations.

As for the enlargement of economic gaps, we can expect the sector to recover relatively soon as far as travel restrictions, confidence and safety measures allow, since the recovery will depend on older and richer segments and the most motivated experiential tourists are mature, educated and high-income people. On the other side Millennials, who in some countries have a more precarious job situation, represent the major market share for experiential tourism and this could unbalance the situation leading to less request of experiences. Nevertheless, the studies also indicate that many of them will prefer to spare money on other expenses rather than those related to travel and experiences.

Regarding digitalization, experiential tourists are used to search information and book their travel and experiences online so this will not have a negative impact but will instead be reinforced: probably, also the less technological tourists will have become more familiar with it. In addition, thanks to digitalization Airbnb and Amazon have launched "online experiences", allowing people to connect and live experiences directly from home.

Regarding sustainability, experiential tourists are already more inclined to visit less-known destinations and places out of the beaten track. Furthermore, they prefer using local or managed by locals services in line with sustainable tourism trends even though, as seen before, this is due more to searching for an "authentic" experience rather than for ideological reasons.

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