TOURISM AND THE PANDEMICS:
ONLY THREATS OR (A FEW) OPPORTUNITIES?

Veronica Cavagliato[1], Clementina Bruno[2], Marco Novarese[3]

Abstract

The COVID-19 pandemic had a profound impact on the tourism industry, and Italy was no exception to its effects. Despite the uncertainties surrounding the sanitary situation, Italian travelers did not entirely forego vacations. However, the pandemic altered and complicated their choices compared to previous times. This study presents the results of two surveys designed to delve into how tourists' preferences and choices evolved during the pandemic. Our findings highlight emerging trends that offer opportunities for intermediaries and the development of lesser-known regions. Notably, travelers expressed a growing need for establishing trust either with the host or intermediary, with a clear preference for direct human contact. Furthermore, an increasing inclination towards smaller, less crowded destinations characterized the demands of pandemic-era tourism. The long-term sustainability of these new trends as sources of value creation will depend significantly on the willingness and capability of tourism companies and institutions to invest and adapt.

Keywords: Airports; Geography of transport, Aerotropolis, Airport city.

1. Introduction

The COVID-19 pandemic has had a profound impact on the tourism sector. While the industry's vulnerability to the pandemic is contingent upon various factors and exhibits geographical variations, as demonstrated by Duro et al. (2021) in the case of Spain, it is a shared reality that the global tourism sector has endured significant setbacks. Furthermore, the estimated recovery period has been predicted to be particularly protracted (Škare et al., 2021).

The pandemic has fundamentally affected consumer perceptions regarding travel risks and management (Rahman et al., 2021). This disruption has led to a departure from established industry trends and prompted the development of novel forecasting models for potential recovery, as evidenced by studies such as Fotiadis et al. (2021) and Zhang et al. (2021). In addition, residents of tourist destinations find themselves grappling with a challenging dilemma, balancing the economic benefits derived from tourist inflows against concerns over infection risks (Kamata, 2022).

Italy is globally renowned for its robust tourism sector, yet the pandemic has inflicted significant losses across the entire tourism supply chain (Angeloni, 2021).

A report by Istat (2022) underscores that the decade preceding the pandemic crisis witnessed a consistent growth in tourism flows, with an average annual increase of 1.5%. This growth culminated in 2019, with 131.4 million arrivals and 436.7 million overnight stays. It's within this context that the COVID-19 pandemic and the subsequent lockdowns, travel restrictions, and mobility limitations, especially across international borders, had a profoundly adverse impact on the tourism sector.

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[1]Veronica Cavagliato holds a master's degree in economics, Management and Institutions, at the University of Piemonte Orientale. Part of this work relies on her master thesis.

[2]Clementina Bruno is associate professor of Management, University of Piemonte Orientale.

[3]Marco Novarese is associate professor of Economics, Univerisity of Piemonte Orientale.

Notably, in 2020, international tourism flows declined by a staggering 70.9%. Among various types of accommodations, hotels experienced more substantial losses. In 2021, there was a modest recovery within the industry, surpassing the European average. However, the situation remained far from a complete resolution. It was only in 2022 that a substantial recovery began to materialize. Nevertheless, upon examination of data from the first nine months of 2022, it becomes evident that pre-pandemic business levels have yet to be restored. This is particularly true for hotels, which still lag behind by -13.8% and -6.7% in foreign and domestic flows, respectively, when compared to 2019 data. In contrast, other accommodation options have nearly fully recovered.
Interestingly, the same report highlights that during the summer periods of 2020 and 2021, the decline in domestic tourism was relatively moderate. Even during the years most severely impacted by the pandemic, Italian tourists appeared to seldom forgo vacationing within their home country.
The pandemic period also served as a time for reflection. While the emergency was undeniably perceived as a dire threat, it also presented certain, perhaps somewhat concealed, opportunities for reshaping the tourism landscape in Italy. It prompted a reevaluation of how tourism is offered and experienced, addressing long-standing needs for a more sustainable and competitive industry (Adamo, 2020) and fostering renewed connections between guest and host communities (Corbisiero, 2020).
This transformation was not solely driven by changes in the offerings; the entire hospitality industry had to adapt its services to comply with legal and sanitary norms. Additionally, from the demand side, new trends emerged, such as the embrace of "slow tourism" or rediscovering it (Mini, 2020), along with the concept of "proximity tourism," involving travel activities over short distances. These trends not only accommodated the constraints posed by health regulations but also led to a redistribution of tourism flows toward more remote and marginalized areas, consistently with sustainability principles (Corbisiero, 2020).
Furthermore, the pervasive uncertainty induced by the pandemic is likely to influence the behavior of potential tourists in various phases beyond just destination selection. Some scholars emphasize that uncertainty avoidance is associated with information-seeking behavior (Quintal et al., 2010), while others underscore the significance of trust in the context of tourism (Williams and Baláž, 2021). These observations prompt consideration of choices related to accommodation types and the potential reliance on informed intermediaries, such as travel agencies.
Consequently, the objective of this study is to investigate the impact of the pandemic on the preferences of potential tourists concerning their destination choices, accommodation, and reservation methods. We analyze the findings from two questionnaires distributed in different moments during the emergency period to better understand how these changes are reshaping the roles of various stakeholders in the industry.

2. Tourism and uncertainty during the pandemics

2.1 Pandemics, uncertainty and short distances

As previously discussed, the summer seasons of 2020 and 2021 in Italy exhibited a notable trend—an only modest reduction in domestic tourism flows. Italian travelers did not refrain from embarking on, albeit relatively brief, vacation periods when circumstances allowed, even during the pandemic. However, these vacations assumed distinct forms from the past. One noteworthy trend that emerged during this period was labeled "proximity tourism," characterized by travel over short distances, primarily by car. This trend led to the exploration of villages, natural attractions, or places boasting landscapes of exceptional beauty located just a few kilometers from home. At times, these short-distance travels are described as "staycations" (Angeloni, 2021).
This trend was not unique to Italy; Lebrun et al. (2022) discovered that the French tourists also sought proximity in their vacation planning during the summer of 2020 (among those who planned to travel). According to the authors, this choice was influenced by the anxiety stemming from the Covid-19

outbreak, which encouraged a preference for shorter distances. It was also driven by the desire to remain in familiar settings, surrounded by familiar individuals, and in regions with fewer health-related constraints.
This mode of enjoying the tourism experience, which aligns with mobility restrictions and the prevailing climate of uncertainty—stemming from the risk of contagion and the often abrupt yet necessary changes in mobility regulations during the pandemic—has historical roots. It resembles the practices prevalent in the 1950s and 1960s, especially among families with limited financial means. Subsequently, the decline in air travel costs and the emergence of high-speed travel alternatives made long-distance travel more accessible and cost-effective. However, the uncertainty and limitations brought about by the pandemic have led to a revival of "proximity tourism," offering a new avenue for development, provided that this trend's effects can be translated into lasting impacts at the local level. This potential for development in marginal and under-explored areas has been discussed by Cresta (2021) in the context of the Irpinia region.
This manner of vacationing is further characterized by its low tourist "density," aligning with the concurrent necessity for physical distancing, particularly in terms of safeguarding the health of local communities. This imperative could not be disregarded, especially when considering that, in the initial stages of the pandemic, certain outbreak clusters appeared in highly touristic areas (Bernardini, 2020).
Moreover, this approach appears to offer a means of reconciling the urgency for a swift industry recovery with the increasingly pronounced emphasis on sustainability (Higgins-Desbiolles, 2020).
Building on the insights from Lebrun et al. (2022), the value of proximity tourism can be further enhanced when implemented in the form of ecotourism or through unique experiences geared towards exploring the potential of local attractions. This can be facilitated by engaging local guides to provide authentic and enriching experiences. Additionally, the authors advocate for the utilization of innovative communication methods based on social media. These methods not only reduce the necessity for in-person interactions but also generate a significant word-of-mouth effect.

2.2 Uncertainty and transaction costs: the role of travel agencies

In recent decades, the tourism industry has undergone a significant disintermediation process, as highlighted by Law et al. (2015). Numerous customer segments have found it more convenient, faster, or cost-effective to directly engage with tourism service providers through the internet or internet platforms. Traditional brick-and-mortar travel agencies have progressively seen their central role as intermediaries diminish, although some have adapted by focusing on specific niche markets (Abrate et al., 2020).
In a perfectly competitive market, there would theoretically be no need for intermediaries, and transactions would occur directly through the market itself, guided by information conveyed through pricing mechanisms. However, in less than perfectly competitive markets, direct exchange of goods and services can be accompanied by substantial costs. These costs encompass efforts to identify suitable counterparts, gather information about their reliability, assess product quality, negotiate and establish contracts, and even potentially engage in litigation. These additional costs, beyond the core exchange itself, are referred to as transaction costs (Coase, 1937; Williamson, 1985). Transaction costs tend to increase in situations where the product is non-standardized, the purchase is perceived as significant, the purchaser lacks experience with the product, information is asymmetric, or uncertainty prevails. When transaction costs associated with market-based exchanges become prohibitively high, opting for a different organizational structure that employs intermediaries can result as more advantageous (Clerico, Novarese, and Rizzello, 2007).
Travel agencies serve as intermediaries primarily aimed at mitigating transaction costs, including search costs, quality uncertainty, and coordination costs (Calveras, 2007). These are transaction costs, as they serve the need to use the market.
Tourism services inherently encompass a significant level of uncertainty, as they are considered experience goods (Nelson, 1974). The quality of these services can often only be assessed during or

after consumption. For this reason, travel agencies played a crucial role in the tourism industry for an extended period. Despite their services not being provided free of charge, they were frequently deemed more convenient than direct market exchanges. Using the service of a travel agent, consumers reduce their transaction cost (travel agents charge a fee that is an explicit transaction cost, reducing other implicit costs).

However, with the advent of internet services and the aforementioned disintermediation process, the role of travel agencies has markedly diminished (Calveras and Orfila-Sintes, 2019).

The pandemic crisis, however, through its amplification of uncertainty in the purchase of tourism services, may have given rise to new opportunities for traditional tourism intermediaries. The information provided by internet platforms or Online Travel Agencies (OTAs) was no longer deemed sufficient, and tourists began to seek additional information and reassurance, which could only be acquired through direct contact with dedicated personnel. The subsequent section aims to provide empirical evidence supporting this point.

3. Empirical analysis

3.1 Travel intentions in Spring 2020

This section of the empirical analysis is grounded in a survey conducted during the final week of May 2020. The survey was disseminated by sharing the relevant link on social media platforms and on the website of the newspaper "La Stampa." The project was undertaken within the framework of the Master's program in "Economia, Innovazione, Comunicazione e Accoglienza per l'Impresa Turistica" at the University of Piemonte Orientale. We are grateful to the students for their invaluable support in data collection.

For this study, we have focused on a cohort of individuals who have a history of taking vacations in the past and expressed an intention to do so in 2020. The total number of respondents in this category amounts to 551, with 61% being female. The average age of the respondents is 31 years, with a median age of 25.

Participants were queried about their past vacation booking practices and how they intended to make reservations in 2020. Regarding their reservation preferences, respondents were presented with the following options:

- Utilizing the services of travel agencies.
- Making reservations once they had arrived at their destination.
- Establishing direct contact with the hotel or hospitality establishment.
- Generally not making any advance reservations.
- Utilizing booking websites.

For past reservations, respondents had the option to select more than one choice (resulting in several combinations of choices). However, for the current year (2020), respondents were instructed to select only the option they intended to use.

The responses are presented in Table 1. Regarding reservation habits in the past, we have categorized the responses into four groups, considering situations where multiple options were chosen:

- Travel agencies: Individuals who exclusively relied on travel agencies for reservations in the past or combined travel agencies with other options.
- Self-made on-site reservations: Individuals who did not make prior reservations or opted to reserve once they had reached their destination, without declaring any other options involving prior arrangements.
- Contacting the host: Individuals who indicated reserving by directly contacting the host, possibly in conjunction with other options, but without the involvement of travel agencies or online platforms.
- Booking websites: Individuals who exclusively relied on booking websites for reservations or used booking websites in conjunction with other options, excluding travel agencies.

The same categorization was applied to reservation intentions for the year 2020. However, in this instance, respondents were instructed to select only one option. It's important to note that the "Self-made on-site reservations" group for 2020 includes only the choice of reserving once arrived at the destination.
Furthermore, it's crucial to recognize that these responses pertain to stated intentions, and the actual choices made by the respondents afterward remain undisclosed.

	How will you book this year?				
How did you booked your holiday in the past?	Travel agencies	Self-made on-site reservations	Contacting the host	Booking webisites	Total
Travel agencies	73	1	11	15	**100**
Self-made on-site reservations	5	4	10	9	**28**
Contacting the host	6	1	41	3	**51**
Booking webisites	38	4	111	219	**372**
Total	**122**	**10**	**173**	**246**	**551**

Table 1: Reservation habits and intentions for 2020.
Source: our elaboration

The trends in holiday reservations saw significant shifts in 2020. Previously, 100 respondents had declared using travel agencies for their reservations in the past, although often alongside other options. In 2020, 122 respondents (a 22% increase) expressed an intention to rely on a travel agency. Existing loyal customers of travel agencies appear inclined to persist with this choice, while other customers from different segments seem inclined to "migrate" towards using travel agencies.
Additionally, there was a notable change in the intention to make direct contact with the host. In the past, only 51 respondents had chosen this approach without combining it with intermediary options. However, in 2020, 173 respondents are inclined to opt for direct contact. Conversely, "impersonal" intermediation through booking websites seems to be less favored compared to the past, with preferences declining from 372 to 246 respondents. Many of these respondents now prefer direct contact with the host or relying on travel agencies for their 2020 reservations. There is also a decrease in the preference for the "riskier" alternative represented by self-made on-site reservations, declining from 28 to 10 preferences.
In summary, the shifts in tourist preferences induced by the pandemic underscore a preference for direct contact and a moderate "resurgence" in the popularity of travel agencies.
The concept of transaction costs, previously mentioned, serves as a valuable framework for understanding this phenomenon. The pandemic created a situation characterized by heightened uncertainty. This included concerns about the risk of contagion, frequent alterations in social distancing and mobility regulations, as well as challenges in information retrieval and reservations.
While relying on a travel agency involves a transaction cost for the tourist, this intermediary serves the crucial role of managing the complexities associated with the reservation phase. Although the internet has significantly reduced such complexities, prompting some customers

to forego agency services, the pandemic introduced new layers of uncertainty. Consequently, it has the potential to create fresh market opportunities for travel agencies, particularly those equipped with the capabilities to effectively navigate uncertainty on behalf of their customers.
A similar rationale applies to the concept of direct contact. Directly reaching out to the host is undeniably costly, at least in terms of the opportunity cost of time. Under normal circumstances, this activity is perceived as unnecessary, thanks to the internet, which is assumed to provide sufficiently reliable information. However, during uncertain periods like the pandemic, the required information for customers is likely to be different and accessible only through direct human contact, potentially mediated by phone communication. Online communication, particularly when based on booking websites or platforms, does not seem to suffice. Furthermore, during the pandemic and in the period leading up to the summer of 2020, individuals likely had more available time, thereby reducing the opportunity cost associated with making phone calls.
These findings imply a specific focus for travel agencies in maintaining their relevance. To sustain their role, travel agencies should concentrate on highly professional and specialized services, or catering to consumer groups with unique needs, such as those related to health conditions. They should also prioritize destinations that pose greater uncertainties. They should clearly understand their role as uncertainty managers.

3.2 Travel choices during the pandemics

A second survey was administered to students at the University of Piemonte Orientale and distributed through social media channels between November 2nd and November 12th, 2021. The survey garnered a total of 1,109 responses, with the majority of respondents being young (18-25 years old) and female (76%). The geographic distribution of respondents reveals that a significant portion resides in the regions of Piemonte and Lombardy.
The respondents were queried about the following aspects:

- Their travel patterns prior to the pandemic.
- Their decision-making processes concerning travel and vacations during the pandemic (it's important to note that this questionnaire was distributed during the ongoing emergency).
- The specific features of hotels and other accommodations that held the highest value for the respondents.
- The significance of proximity tourism during the pandemic.

In relation to the first two points, intriguing comparisons can be drawn. Firstly, it is noteworthy to compare (as presented in Table 2) the number of respondents who were regular travelers before the Covid-19 pandemic with those who undertook travel, even if just for a one-day journey, in 2020 and 2021, during the ongoing emergency.
Remarkably, the number of individuals traveling during the pandemic increased in comparison to the preceding period, with 965 respondents as opposed to 887. Moreover, Table 2 reveals that the number of individuals who had not been travellers previously but chose to embark on journeys in 2020-2021 (180) surpasses the count of respondents who were accustomed to traveling but abstained from doing so during the outbreak (102). This higher propensity to travel during the pandemic could be attributed to reactions toward prolonged restrictions for health reasons. An additional factor could be linked to increased budget allocation for travel, particularly among households that continued working during lockdowns, as leisure activities were curtailed in various phases of the emergency.
However, the largest proportion of respondents consisted of those who were accustomed to traveling before the pandemic and did not forgo vacation opportunities in 2020-2021, totaling 785 respondents. Moreover, prior to the pandemic, the primary motivation for travel among our sample was leisure (accounting for 91.5% of responses). Respondents exhibited a predilection for Italian destinations (59.1%) as opposed to foreign ones (40.9%). Notably, among Italian regions, Liguria emerged as the favoured choice for travel, which aligns with the geographical distribution of our respondents, the majority of whom reside in Piemonte and Lombardy.

For those respondents primarily traveling abroad, European destinations held the upper hand (76.9%) over destinations beyond Europe (23.1%). The most prevalent duration of stay ranged from 3 to 5 nights. In terms of transportation, the most common choices were by car (45.9%) and by plane (40%). A substantial segment of respondents opted to stay in hotels (46.8%) and travelled with their partners, family members (73.5%), or friends (19.4%). Prior to the pandemic, the primary reasons cited for not traveling were associated with economic constraints (51.8%) and time limitations (34.2%).

	Did you travel in 2020 and 2021?		
Did you usually travel before the pandemics?	No	Yes	Total
No	42	180	222
Yes	102	785	887
Total	144	965	1109

Table 2: The choice of travelling before and during the pandemics.

Source: our elaboration.

During the pandemic, leisure remained the primary motivation for travel within our sample, accounting for 91.4% of responses. There was a notable inclination towards domestic destinations, with a substantial preference for Italian destinations (86.5%), a trend that aligned with the challenges associated with international travel.

Among the Italian regions, Piemonte held the largest preference share within our sample, albeit by a slight margin over Liguria. This initial observation suggests a tendency for staying very close to home while traveling. It's likely a consequence of the restrictions that, in certain phases of the emergency, limited movement within one's own region of residence.

Once again, the most prevalent duration of stay fell within the range of 3 to 5 nights (36.2%), and the preferred mode of transport was overwhelmingly by car (60.7%). This choice is likely driven by the perception of safety from a health perspective. Nevertheless, plane travel also had a notable presence (19.3%).

Regarding accommodation preferences, hotels remained the top choice, albeit with a noticeable reduction in their share (35.6%). Similarly, B&Bs saw a decline, while holiday homes and staying at friends' homes increased their combined share (reaching a total of 33.1%). Before the pandemic, their combined share was below 22%. Additionally, the use of "second homes" also saw an increase.

The majority of respondents continued to favor traveling with partners and family (62%) or friends (30.4%), which remained the predominant choice. While the percentage of individuals traveling alone remained relatively low, there was a slight increase from 3.4% to 5.1%.

Notably, 68.5% of respondents indicated that the pandemic influenced their decisions regarding destination, mode of transportation, accommodation, and travel companions.

The primary reason for refraining from travel in 2020-2021 was, unsurprisingly, the pandemic itself (69.4%), followed by economic constraints (16.7%).

Certain attributes, such as cleanliness, options for free cancellation and refunds, and positive reviews, were consistently rated as highly important by respondents (with a majority indicating a value of 4 or 5 on a five-point scale). These considerations held particular significance in light of the prevailing emergency conditions.

Regarding the prospects of proximity tourism, 64.1% of respondents reported having discovered or rediscovered attractions and landmarks within their region or province. This emerging trend, driven by the necessity of short-distance travel, was primarily facilitated through information disseminated via social media. However, traditional media outlets such as newspapers, magazines, television, and word of mouth also played substantial roles. Figure 1 illustrates how respondents discovered previously unknown attractions in their local areas.

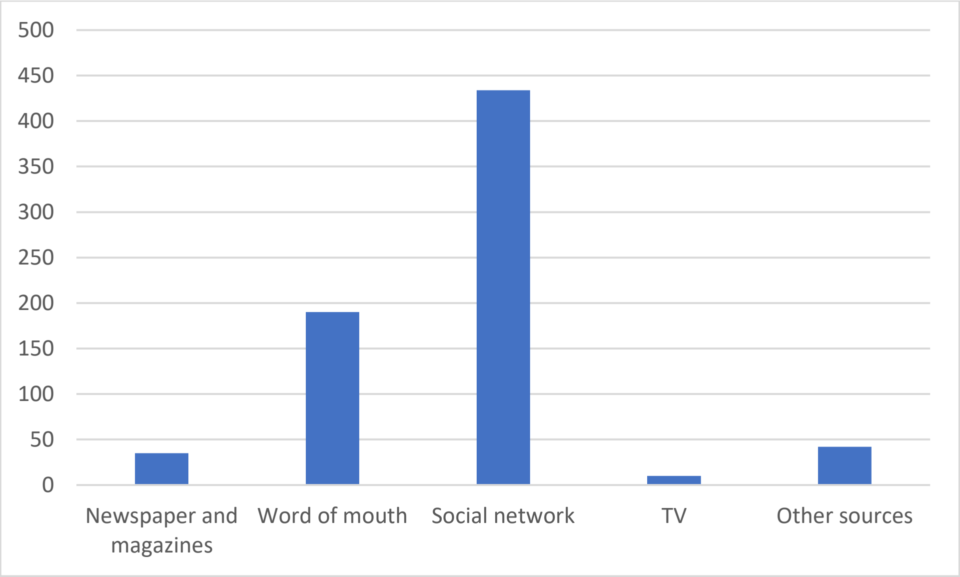

Figure 1. How respondent discover unknown attraction in their area.
Source: our elaboration.

Furthermore, within our sample, the Covid-19 emergency has instilled a heightened awareness of several issues, with 82.9% of respondents expressing greater attentiveness to aspects that were previously given less consideration. Notably, social concerns, such as supporting local businesses and operators, as well as environmental sustainability, have garnered significant importance.

Additionally, it's noteworthy to highlight that approximately half of the sample has shown an increased inclination toward engaging in new outdoor activities.

Finally, a consensus emerges among most respondents regarding the potential for proximity tourism to become a future opportunity for their respective areas. However, they also concur on the pivotal role of transportation and communication infrastructure, which is not consistently perceived as being of a high standard.

In summary, the pandemic period did not diminish the inherent desire for holidays within our sample. However, the constraints and the pursuit of the safest possible accommodations and modes of travel altered travellers' preferences, resulting in the discovery or rediscovery of less-frequented vacation destinations. This development presents new opportunities for these sites, with the potential to evolve into enduring sources of growth in the future, contingent upon the provision of adequate infrastructure.

4. Conclusions

The Covid-19 pandemic constituted an enormous shock for numerous industries, with the tourism sector experiencing exceptionally severe consequences. However, Italian tourism is demonstrating a promising trajectory towards continuous recovery. Remarkably, even amid the pandemic, Italian citizens did not entirely forgo the opportunity for holidays. In fact, one of our questionnaires revealed that individuals who were not accustomed to traveling previously embarked on short journeys in 2020-2021. Nonetheless, the pervasive uncertainty surrounding the public health situation and the swiftly evolving containment measures substantially complicated and altered travellers' choices compared to the past.

Within the overarching context of the tourism industry's challenges, these shifts in choice patterns have presented unique opportunities for value creation. From a distribution perspective, tourists have reevaluated the significance of "physical" intermediaries, such as travel agencies, in providing professional assistance in the reservation process, which has become increasingly intricate. Generally,

there has been a renewed tendency towards the preference for direct contact with service providers (even via phone, without online mediation).
Conversely, mobility restrictions and the heightened desire to remain in close proximity to one's residence have increased the demand for proximity tourism. Individuals have discovered (or re-discovered), often through media channels, attractions situated in close proximity to their place of residence. The consensus among interviewees is that proximity tourism may emerge as a future opportunity for their respective regions. However, realizing this potential would likely necessitate improvements in transportation and communication infrastructure, particularly toward peripheral destinations. These aspects share a common characteristic that emerges as crucial for traveling during the pandemic: an increasing emphasis on the element of trust. The preference for human interaction with intermediaries, leading to a renewed interest in "traditional" travel agencies, the inclination to directly engage with hospitality establishments, the favoring of smaller, less crowded destinations, and the preference for staying in one's own or friends' homes all indicate a heightened need for familiar and secure vacation experiences. This particular aspect can potentially serve as a long-term source of competitive advantage. Businesses such as travel agencies and hotels could accentuate their expertise in providing solutions and addressing issues, emphasizing their commitment to meeting the unique needs of their customers and delivering tailored services. This approach becomes especially relevant when dealing with destinations perceived as "riskier" or providing services to consumer groups characterized by high risk aversion or specific requirements, such as health considerations.
Additionally, the discovery of smaller, less crowded destinations has the potential to evolve into a long-term trend, provided that the word-of-mouth promotion initiated during the pandemic is sustained and reinforced through effective territorial marketing efforts. Social networks have demonstrated their considerable influence, particularly among young travelers. However, the condition of roads and infrastructure remains crucial in determining the attractiveness of a destination. Consequently, local and national authorities must consider investing in peripheral regions as a vital starting point for enhancing their appeal.
Lastly, a synergistic approach could be considered, where travel agencies, in crafting tailor-made services for their customers, actively participate in promoting lesser-known destinations to target segments of tourists who have the potential interest but may not be easily reached through social media alone.
In conclusion, the COVID-19 pandemic has stimulated innovative ideas for value creation within the tourism industry, even rejuvenating declining professions and destinations, or introducing unknown ones. Whether these emerging trends will solidify into enduring sources of value will largely hinge on the capabilities and investment readiness of tourism firms and institutions. However, the elements we have described offer a promising foundation for the development of a more socially and environmentally sustainable tourism sector.

In preparing this work the authors used ChatGPT in order to improve readability and language. After using ChatGPT, the authors carefully reviewed the content of the publication and take full responsibility for it.

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