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Annals of Tourism Research Empirical Insights

DOI:

[10.1016/j.annale.2020.100004](https://doi.org/10.1016/j.annale.2020.100004)

Published: 01/11/2020

Publisher's PDF, also known as Version of record

[Cyswllt i'r cyhoeddiad / Link to publication](#)

Dyfyniad o'r fersiwn a gyhoeddwyd / Citation for published version (APA):

Osti, L., & Nava, C. R. (2020). LOYAL: TO WHAT EXTENT? A shift in destination preference due to the COVID-19 pandemic. *Annals of Tourism Research Empirical Insights*, 1(1), Article 100004. <https://doi.org/10.1016/j.annale.2020.100004>

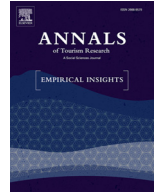
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LOYAL: TO WHAT EXTENT? A shift in destination preference due to the COVID-19 pandemic

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ARTICLE INFO

Article history:

Received 2 September 2020

Received in revised form 17 October 2020

Accepted 19 November 2020

Keywords:

loyalty
risk perception
health emergency
market segmentation
cluster analysis

ABSTRACT

The choice of a holiday destination is affected both by the destination's image and the tourists' loyalty. Previous epidemic and pandemic outbreaks have consistently affected the way people holiday, since their perception of risk is associated to the destination's image and influenced by media coverage and graphic imagery.

We studied tourists' perceptions and behaviours during the first period of COVID-19 with the objective of investigating how preferences and loyalty for different types of destinations (seaside, mountain, art cities) change during health emergencies.

We segmented tourists according to their perceived risk, over months and towards different types of destinations. We found that mountain locations are perceived as safer than seaside destinations and art cities. Despite their expression of loyalty to the same destination, in times of respiratory disease-related risk perception, tourists have shifted destination categories, thus changing their preferences from seaside to mountain destinations.

1. INTRODUCTION

The perception of personal and physical safety is affecting tourists' decisions when choosing a destination to visit (Lepp & Gibson, 2003; Novelli et al., 2018). Studies on past health emergencies – such as SARS, Bird Flu, Ebola – have shown the strict correlation between health-related risks (perception) and tourism flows. Novelli et al. (2018) debated the devastating effects that the “negative media coverage and graphic imagery” of Ebola had on tourism flows in Gambia, a nation close to the epidemic, but without cases of contagion. Similarly, Cooper (2005) discussed the negative impact of SARS on Japanese outbound tourism, while Lee and Chen (2011) demonstrated its negative impact on tourism in Asia. Bausch et al. (2019) stated that the destination image, mainly formed by cognitive and affective attributes (Decrop, 2010), coupled with previous experiences with that destination (Nilplub et al., 2016), affected destination choice and loyalty. Indeed, destination choices are influenced by vertical (same destination) and experimental (same holiday style) loyalty, with horizontal (same accommodation) loyalty exerting only a limited influence (Almeida-Santana and Moreno-Gil, 2018; McKercher et al., 2012).

Thus, the choice of destination is affected by both the destination's image and loyalty. Epidemic and pandemic outbreaks, over the past two decades, have consistently affected the way people holiday, since their

perception of risk is associated to the destination's image and influenced by media coverage and graphic imagery.

Nowadays, the economic super-shock of the COVID-19 (Dolnicar & Zare, 2020) poses an unprecedented threat to human health and economic survival in most countries of the world. At the reopening stage, understanding tourists' perceptions and behaviours is crucial for launching an effective recovery strategy for tourism destinations.

Hence, the aim of this study is to investigate how preferences and loyalty for different types of destinations (seaside, mountain, city) change during health emergencies.

The strength of this study lies in the comparison of destination preferences and loyalty before and after the outbreak of the pandemic in the first half of 2020 in Italy. Thus, this study considers the first European country to have been severely affected by COVID-19 and to have implemented some of the most stringent lockdown measures in the world.

2. METHODOLOGY

To achieve this aim, an online questionnaire was administrated through snowball sampling to Italian residents from May 25th to June 14th 2020. The online questionnaire was structured in four sections, however only the part on loyalty and destination shifts was used for this study. Questions

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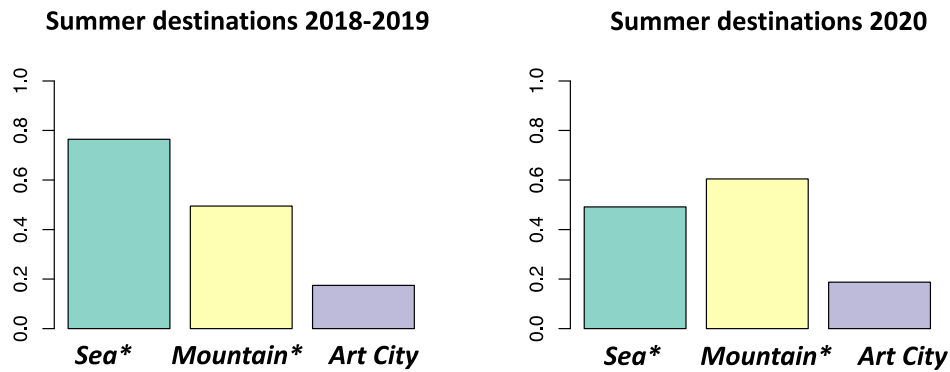


Figure 1. Destination preferences: summers of 2018-2019 and 2020 (* statistically significant at 0.01)

regarded the following topics: travel destinations over the past two years; safety perception of different destination types for each 2020 summer month; safety measures implemented at the destination and at the accommodation; intention to holiday and the adopted behaviour for the 2020 summer; and, finally, the demographic profile. In total, 1,534 answers were obtained. Respondents are mainly females (68%) with a university degree (45%), or a high school diploma (45%), and with an average age of 42.6. Most of the respondents (86%) have gone on vacation in the 12 months prior to the survey. When going back 24 months (or two summers), there is a higher propensity (76.5%) for seaside holidays rather than mountain locations, art cities or other types of destinations. More than two thirds of the sample (73%) is planning on going on holiday in Italy during the 2020 summer months. Those who do not intend to go on holiday during this period (27%) are mainly driven by the feeling that it is still not safe enough to travel (54%), or due to economic constraints (17%).

3. RESULTS

In order to investigate loyalty to the destination for the 2020 summer holiday period, respondents were asked to rate how likely they are to visit their usual destinations and accommodation. Only 19.5% stated not to have a usual destination for their summer holidays and 23.9% do not have a customary hotel/accommodation. The rest of the respondents show a high propensity for loyalty towards the destination and a partial propensity towards the accommodation infrastructure. On average, they are likely to return to the same destination (mean value 4.2, 34.3% aver very likely on a scale from 1 to 5) and to the same accommodation infrastructure (mean value 3.66, 25.4% aver very likely on a scale from 1 to 5) for their 2020 summer holidays.

Nevertheless, despite the stated loyalty, it is interesting to check whether the post-pandemic 2020 summer holiday brought about some changes to the choice of the destination. A first comparison of the raw data reveals a shift from seaside to mountain destinations, with a slight increase in art-cities (Figure 1). It was decided to focus on these three destinations as they represent the typical choices of Italian summer tourists. This

evidence is also confirmed in our survey: these three destinations represent more than 75% of the choices for both the 2018-19 and the 2020 summer.

In order to further investigate the shift in destination choice, we made a hierarchical cluster analysis grounded on a binary transformation of the ordinal variables (1-2-3=0 and 4-5=1) measuring the perceived risk over months towards different types of destinations. Hence, a value equal to 1 identifies respondents who feel safe/very safe. This transformation is suitable to overcome some of the drawbacks of ordinal variables (Dolnicar & Grün, 2007; Dolnicar et al., 2018) and permits the computation of the Euclidean distance used in the hierarchical cluster analysis with the Ward's method.

The analysis produced five clusters, which are shown in Figure 2 (red points indicate sample averages, while grey boxes define no marker variables). Cluster 1 (31%) "Pessimists" is composed of respondents who are totally risk adverse; Cluster 2 (16%) "Optimists with reservations on cities" includes people who declare to feel safe, but not in art cities; respondents in Cluster 3 (11%) "Optimists" feel safer than those in the other clusters; Cluster 4 (17%) "Precautious" groups respondents who feel safe only in September/October; while Cluster 5 (26%) "Mountains" identifies tourists who feel safer only at mountain locations.

In general, all five clusters identify mountain destinations as safer than seaside destinations and art cities; they all rate the mountains as becoming safer sooner than the seaside and art cities once the first pandemic lockdown is over. "Pessimists" feel safer travelling in August/September rather than June/July, while Clusters 2, 3 and 5 on average perceive the month of October to be less risky than September (Figure 2). This is probably due to the fear of the forecasted "likely" second pandemic wave which could hit the Northern Hemisphere early autumn. Some further descriptive statistics of the identified clusters are shown in Table 1 while Figure 3 shows their destination preferences.

Concerning loyalty towards the same destination and accommodation infrastructures, respondents in each cluster expect to return, on average, to the same holiday destination (around 4) and to the same accommodation (3.62) without statistical differences between clusters, even though on average "Optimists" are the most loyal and the "Precautious" are the least loyal tourists (here we are considering only people who intend to go on holiday in Italy during the 2020 summer). Nevertheless, there is a statistically

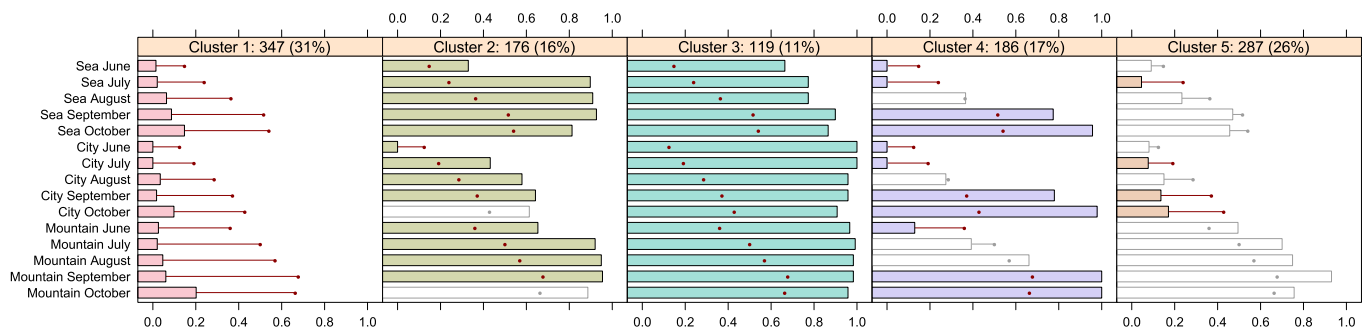


Figure 2. Segment profile plot for clustering variables

Table 1
Descriptive statistics of the five clusters

	Cluster 1 Pessimists	Cluster 2 Optimists with reservations on cities	Cluster 3 Optimists	Cluster 4 Precautious	Cluster 5 Mountains
Female	73.0%	56.7%	61.8%	68.2%	74.8%
Age	46.59	44.07	44.12	38.98	43.59
Duration of the vacation	9.46	10.48	9.71	8.55	10.59
Education					
High School diploma	52.7%	45.7%	50.6%	38.6%	44.7%
University degree	41.5%	47.2%	46.1%	55.3%	49.6%
Occupation					
Employee	72.6%	76.4%	71.2%	62.9%	63.3%
Retiree	14.9%	7.1%	4.5%	3.0%	11.1%
Legislative measures					
Current measures are enough	61.8%	66.1%	58.4%	63.6%	74.8%
I would like more restrictive measures	31.5%	5.5%	4.5%	22.7%	16.4%

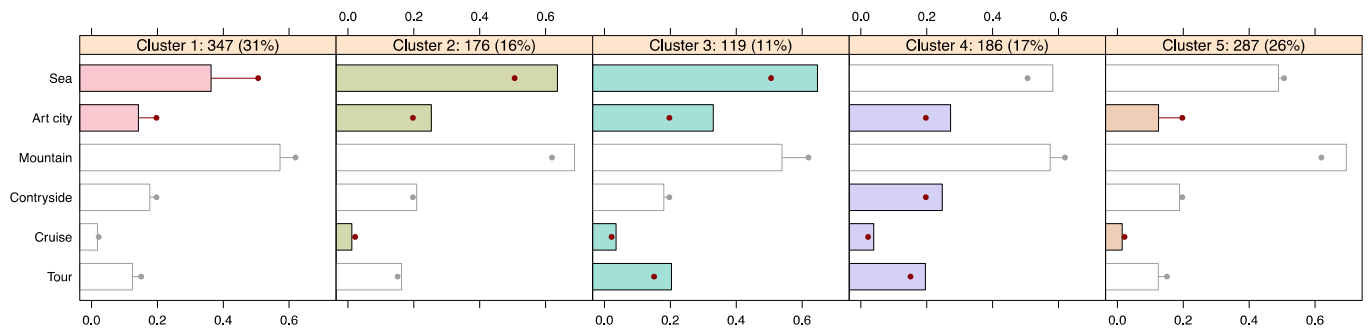


Figure 3. Destination preferences by clusters (ordinal variables have been binarized 0 = 1-2-3 and 1 = 4-5, thus 1 identifies respondents that rate probable/highly probable reaching a holiday destination in the 2020 summer)

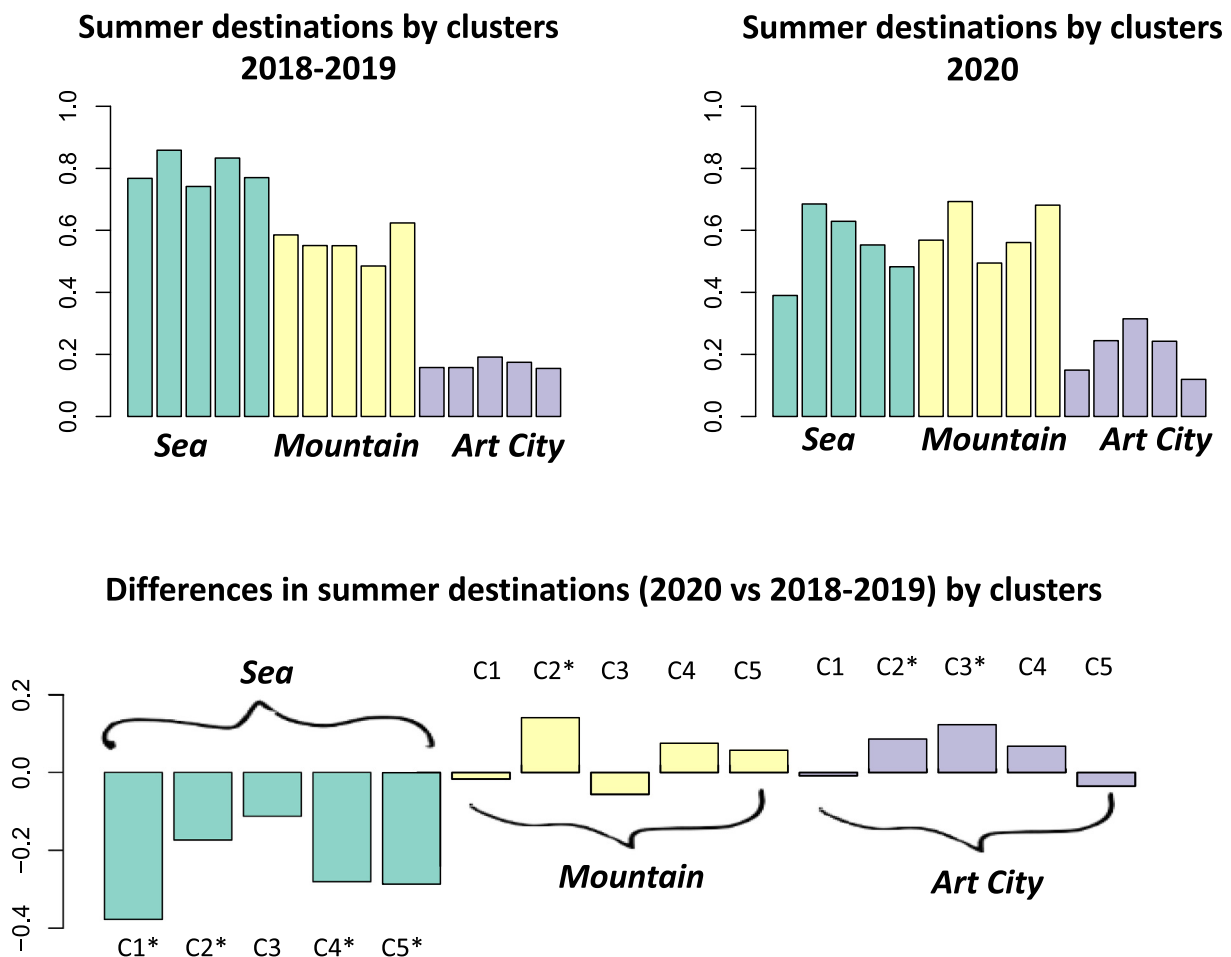


Figure 4. Destination preferences by cluster (* statistically significant changes in preference at 0.05)

significant shift in tourists who usually visited the seaside (those who had gone during the summers of 2018 and 2019) in favour of the mountains (Figure 4). This shift is particularly noticeable for “Optimists with reservations on cities”, “Mountain” and “Precautious” tourists.

4. CONCLUSION

Overall, this preliminary study shows the extent of destination loyalty during a global pandemic. Past research mainly investigated loyalty to the same destination (intended as location), while in this study we address the broader loyalty to the same destination type. When it comes to “stated” loyalty, all clusters show a high commitment towards the destination/location and a medium one towards accommodation, confirming the evidence provided in McKercher et al. (2012) and Almeida-Santana and Moreno-Gil (2018). Nevertheless, when asked what type of destination they would visit in the early post-pandemic reopening period, a shift from one destination type (seaside) to another (mountain) was noted.

The most risk sensitive (“Pessimists”) tourists are less likely to visit a seaside destination. The medium risk (“Precautious”) tourists will probably change their destination from the seaside to the mountains as will the “Optimists with reservations on cities” and the “Mountains” cluster. While “Optimists” are the most carefree and are ready to visit Italian art cities during the 2020 summer, destinations less attractive for the other clusters.

Thus, what can we conclude regarding the degree of tourist loyalty to a destination? Despite a verbal expression of loyalty to the same destination, in times of respiratory disease-related risk perception, tourists tend to shift destination categories, and change their preferences and loyalty from seaside to mountain destinations. The mountains are perceived as safer, very likely due to the open environment, the natural distancing offered by the orographic conformation, the clean and fresh air. Gaps in loyalty theories, such as the one here identified, were also found by Bausch et al. (2019) in the context of environmental shocks (climate change).

This research could be replicated in other countries, for example Sweden and/or the USA, which are implementing very different approaches to the confinement of the virus.

Further research is also needed on experiences and perceived risk when going on holiday. Finally, it is essential for destination managers to determine whether the shift from the seaside to the mountains is a temporary emotional response to a perception of risk or if it is the beginning of a long-lasting trend.

Acknowledgements

The authors would like to sincerely thank Francesca Salis for her precious help in the data collection.

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