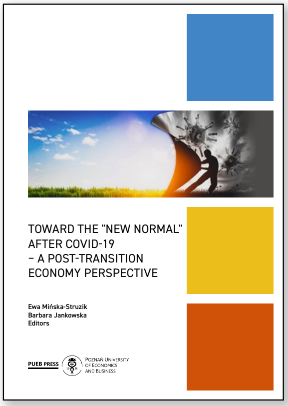


# TOWARD THE "NEW NORMAL" AFTER COVID-19 – A POST-TRANSITION ECONOMY PERSPECTIVE

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# 1. Internal substitution in the tourism market: Effects of the Covid-19 pandemic

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## Abstract

**Purpose:** The effects of the global COVID-19 pandemic are difficult to estimate, but the impact on the tourism industry is undeniable. This also applies to consumers' behavior in the tourism market, whose attitudes towards travel may change radically. The aim of this chapter is to analyze substitution processes in the tourism market caused by the COVID-19 pandemic.

**Design/methodology/approach:** This paper is a review in nature and includes papers on tourism economics, particularly the tourism market, as well as secondary data on changes in tourism (tourism participation and consumer behavior) due to the COVID-19 pandemic.

**Findings:** The Covid-19 pandemic does not have to be the factor slowing travels, as it may affect internal substitution on the tourism market. In the situation of the Covid-19 pandemic, all internal substitution options listed in the chapter were noticed on the tourism market in Poland.

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**Research limitations/implications:** As long as the emergency situation restricting the functioning of the tourism market continues, the results of the study cannot be definitive.

**Practical implications:** The results can be useful for tour operators, especially in the process of planning tourism development after the crisis caused by the pandemic.

**Social implications:** The chapter indicates changes in consumer behavior on the tourism market caused by COVID-19 pandemic, which may characterize tourists after the end of the pandemic.

**Originality and value:** The article identifies types of internal substitution that occurred in the tourism market in Poland as a result of the COVID-19 pandemic.

**Keywords:** tourism market, COVID-19 pandemic, internal substitution, tourist behaviour.

## 1.1. Introduction

The tourism market, although governed by the general laws of the market, shows many special characteristics resulting from the characteristics of the tourist product and from the nature of the demand reported by tourists (Kachniewska, Nawrocka, Niezgoda, & Pawlicz, 2012). Particularly characteristic features of this market are:

- continuous transformations on the side of tourist demand resulting from more and more diverse needs and expectations of tourists;
- increasing diversification of the tourist offer (in response to these needs);
- the influence of various interest groups, whose aspirations are not always in line with the interests of companies on the tourism market;
- changes in the environment of tourist enterprises;
- the growing number of competitors, not always clearly and unequivocally linked to the tourism industry.

As an industry that brings together many different service providers, tourism is very sensitive to shocks associated with unforeseen situations such as terrorist attacks, natural disasters, or the rapid spread of diseases. The aim of this chapter is to analyze substitution processes in the tourism market caused by the Covid-19 pandemic.

## 1.2. Pandemic-driven substitution processes on the tourism market: Theoretical considerations

The tourism market reacted extremely strongly to the restrictions on travel and business that were introduced to stop the disease. First, the pandemic influenced the behavior of consumers, who out of concern for their health, changed their decisions regarding holiday trips. Second, because of the threat, governments introduced restrictions on travel and business activities. As a result, third, businesses had to adapt to changes in demand and to new legal conditions.

The Covid-19 pandemic caused potential tourists to resign from purchasing tourist goods and services in favor of other forms of recreation. This is a substitution external to the tourism market, an example of which is the conversion of a trip into one:

- passive recreation (e.g. reading books, watching TV or using offers of attractions watched with mobile devices);
- physical recreation at home;
- purchase of goods and services completely unrelated to the tourist market (e.g. fitness equipment, home and garden equipment, books, TV programs);

As Dziedzic and Skalska (2012) indicate, external substitution poses a threat to the tourism services sector. If, despite the pandemic, tourists changed their decisions about the chosen tourist product in favor of another tourist offer, internal substitution processes would occur:

A. conversion of a tourist trip planned abroad into a similar tourist trip in the country, maintaining the required standard (e.g. stay in a foreign hotel with the all-inclusive option converted into such a stay in a resort in Poland);
B. replacement of a tourist trip planned abroad for a trip in the country but changed in terms of standard of services and adapted to pandemic constraints, i.e. the exchange of a higher standard abroad for a lower standard in Poland (e.g. exchange of a stay in a foreign hotel with the all-inclusive option for a vacation in a camping house in Poland);
C. replacement of a tourist trip planned in Poland with another domestic trip but changed in terms of service standard and adjusted to pandemic constraints, i.e. replacement of a higher standard in Poland with a lower standard in Poland (e.g. replacement of a stay in a Polish hotel with the all-inclusive option with a vacation in a camping house);
D. replacement of a tourist trip planned abroad with a trip in Poland but changed in terms of the standard of services and adjusted to pandemic restrictions, i.e. replacement of a lower standard abroad with a higher standard in Poland (e.g. replacement of a stay in a foreign hotel with a stay in a higher standard hotel in Poland);
E. replacement of a tourist trip planned in Poland with another domestic trip but changed in terms of the standard of services and adjusted to pandemic constraints, replacement of a higher standard in Poland with a lower standard in Poland (e.g. replacement of a stay in a holiday resort with a stay in a Polish hotel of high standard).

As indicated by Dziedzic and Skalska (2012) and Mazurek-Kusiak (2019), internal substitution increases competitiveness between companies in the tourism market but at the same time improves the quality of tourism services and products.

## 1.3. Covid-19 and the tourism market

The Covid-19 pandemic, like SARS, is considered to be a top crisis that deeply affects the world's tourism market (Polyzos, Samitas, & Spyridou, 2020; Tsionas, 2020; Ying, Wang, Liu, Wen, & Goh, 2020).

SARS is a viral respiratory disease, first recorded in 2003, which quickly moved by air from China (Guangdong province) to Europe and North America (Polyzos et al., 2020). The SARS pandemic had a significant impact on the tourism market at that time: the number of international tourists during the second and third quarters of 2003 has decreased by 42.83% and 7.24%, respectively (Feng-Yuan & Feng-Jie, 2013; Polyzos et al., 2020, p. 1). Several years later, at the end of 2019, another pandemic of the new, dangerous SARS-CoV-2 virus – known as Covid-19 – broke out in China (Wen, Kozak, Yang, & Liu, 2020). Covid-19 in a very short time spread to other countries and continents. In the first quarter of 2020, the Covid-19 pandemic caused a 22% fall in international tourist arrivals (UNWTO, 2020b). According to forecasts from the first half of 2020, the crisis caused by the Covid-19 pandemic could lead to an annual decrease of this number by 60% to even 80% compared to 2019 (UNWTO, 2020b). Scenarios presented by the World Tourism Organization (UNWTO) indicated possible declines in arrivals of 58% to 78% for the year, and such decreases in demand for international travel would translate into: loss of 850 m to 1.1 bn international tourists, loss of USD 910 bn to USD 1.2 tn in export revenues from tourism and 100 to 120 m direct tourism jobs at risk (UNWTO, 2020b).

These estimations seem to be close to reality. In October 2020 (UNWTO, 2020a) announced that in July and August 2020, the peak tourist season with the highest number of international arrivals, their number dropped by 81% and 79% respectively. Statistics from August show that there were 700 m fewer arrivals than in 2019, what translates into a loss of USD 730 bn in export revenues from international tourism and exceeds eight times the loss caused by the 2009 financial crisis (UNWTO, 2020a). Finally, according to the latest information from the UNWTO (2021), the collapse in international travel represents an estimated loss of USD 1.3 tn in export revenues. As UNWTO (UNWTO, 2020b) points out, the situation caused by Covid-19 is by far the worst crisis that international tourism has faced since records began; that is, for the last 70 years.

Although the effects of unforeseen situations are difficult to quantify both before and after they occur, as the example of the Covid-19 pandemic shows, such incidents have the potential to affect entire countries' economies and even the global economy. The experts' forecasts of the return to normality are not very optimistic. In 2020 the recovery in tourism was expected not earlier than in the third quarter of 2021 but – according to some experts – it will not happen earlier than in 2022 (UNWTO, 2020a). In process of time, the prognosis is less optimistic. In early 2021, UNWTO (2021) presented a summary in which most experts do not expect a return to pre-pandemic levels before 2023. The pandemic of the new virus has led to large drops in tourist traffic, and it seems that the period of return to the well-known tourism will take longer than originally expected.

The Covid-19 pandemic is considered to be one of the biggest crises (Polyzos et al., 2020; Ying et al., 2020), whose consequences will be particularly severe for the tourism industry (Tsionas, 2020). The pandemic is a factor that has a significant impact on the microenvironment of enterprises and may affect the formation of competitive forces in individual sectors of the economy. As a result of the limitation of international and domestic tourism, competition between entities operating on the tourism market may intensify.

## 1.4. Effects of Covid: External and internal substitution on the tourism market

During the first part of governmental restrictions in Poland, the slogan *#zostanwdomu* (stay at home) encouraged the society to indoor activity. Actions limiting the development of the pandemic were directed primarily at the exchange of the purchase of tourist goods and services for other goods and services. Tourism market players, fearing external substitution, began to take action to maintain consumer interest in tourism goods and services. In accordance with the recommendations issued to the tourism industry by the Polish Tourist Organization, the following actions were taken (POT, 2020b):

- tourist attractions: maintaining constant contact with tourists through social media, creating an offer of virtual walks in applications or websites, promotional films, animations, and by organizing competitions and promotional quizzes with prizes, e.g. tickets and special invitations for long-term use;
- accommodation facilities: reschedule your reservation (free of charge) and offer additional service at a promotional price or free of charge and a voucher;
- gastronomy: introduction of an offer of ready-made take-away dishes and delivery;

- tourist information: using creative forms of promotion on the Internet, emphasizing beautiful nature and natural tourist attractions in the regions, recommending outdoor walks to hikers "trapped" at home.

In the face of these limitations, the Polish society began to devote more time to the consumption of digital services. The actions taken by tourism market players were reflected in specific consumer behavior. Apart from watching films and series (73%), spending time on social networking sites (57%), watching educational films (50%), developing their interests (48%; e.g. learning to play an instrument, cooking courses, beauty academy workshops, photography), listening to audiobooks (24%), and physical exercise with video (19%), every fourth Pole took part in a remote cultural event and made a virtual visit to a museum (Sas, 2020).

These tools and initiatives such as the Poland-wide campaign *#ZmienTermin-NieOdwoluj* (Change the Date, Don't Cancel) or the online campaign of the Polish Tourist Organization and the Ministry of Development *#WybierzVoucher* (Choose the Voucher) are to encourage tourists not to cancel their reservations and not to withdraw their payments. These are the actions that support tourism industry entities, which suffered during the pandemic, but it should be emphasized that they did not limit external substitution.

In the next stage of the pandemic, when the restrictions were relaxed and it was possible to actively participate in tourism, Polish tourism companies took creative actions as part of internal substitution on the tourism market.

The results of a survey conducted at the turn of May and June by the Centre for Public Opinion Research (CBOS) indicate that as many as 80% of Poles planning a summer holiday were only considering a domestic trip. The foreign trip planned at the beginning of 2020 was marked by 38% (10% only foreign) and now indicated by 16% of respondents (5% only foreign; CBOS, 2020).[1] Thus, we see a change in preferences toward abandoning foreign trips and choosing domestic trips. It is worth noting, however, that this may have been associated with restrictions still in force: the suspension of international passenger air traffic to and from Poland and mandatory quarantine and restrictions in other countries. Interestingly, the results of the same survey show that respondents indicating a significant impact of the pandemic on changing their holiday plans are more likely to plan their holidays abroad than those who have not made such changes at all (19% against 11%). According to the research, the most willing to go abroad are young, well-educated people, earning more than 3000 PLN (ING, 2020)[2]. Despite the growing interest of Poles in using the offer of the national tourist base and a huge opportunity for

[1] The study was carried out from May 22 to June 4, 2020, N = 1308.

[2] The survey was conducted in June 2020 as part of the Think Forward Initiative by IPSOS BN, N = 1002.

the development of domestic tourism in the period of July–August 2020, only 5.9 million tourists stayed in Polish tourist accommodation facilities, i.e. 29.3% less than a year ago (Statistics Poland, 2020). Domestic tourists accounted for almost 90% of the total number of tourists in that period, but there were less of them by 19.6% compared to the previous year, the length of stay of domestic tourists increased only slightly (3.4 overnight stays, 2019: 3.3) (Statistics Poland, 2020).

Tired of being “locked up” in their homes but fearing for their safety, most Poles were looking for places away from other tourists, places off the beaten track, cottages, or guesthouses by the lake or by the sea. The most popular places in the Google search engine were those that can be visited near the tourist’s place of residence, located close to nature – national parks and mountains – while the number of searches for places that were extremely popular in recent years decreased, i.e. large clusters of people such as theme parks or popular tourist destinations – (wGospodarce, 2020). Large cities, so far focused mainly on business tourism, saw a large drop in tourist arrivals. According to the Statistics Poland data e.g. in July the largest decrease in the number of overnight stays was recorded in the Mazowieckie Voivodeship (by 54.5%), while the smallest in the Warmińsko-Mazurskie Voivodeship (by 9.8%; Statistics Poland, 2020).

Changes in tourists’ behavior also concerned the choice of means of transport and accommodation, almost 60% of Poles indicated avoiding public transport in favor of their own car. Hotels were still chosen as the main accommodation, but more than 50% of tourists when asked about changes in travel during the pandemic indicated avoiding large hotels (ING, 2020). This is confirmed by an analysis of trends in Google: increased interest in holiday rentals (from 13% to 16% in relation to 2019) and an increase (by 45%) in searches with the phrase “agritourism” (wGospodarce, 2020). In addition, within the framework of hotel facilities, the improvement in the situation on the hotel market in August compared to July this year was influenced primarily by hotels located outside cities or those with a dominant leisure segment (IGHP, 2020).

The pandemic situation and the need to maintain safety did not significantly affect the criteria for selecting a holiday destination. The issues of increased sanitary standards are indicated by less than 30% of Poles, the most important choice factor for both domestic and foreign holidaymakers, while economic issues remained the same (POT, 2020a).[3] Almost half of all Poles have a smaller budget than usual (ING, 2020). It can therefore be said that Poles have chosen cheaper solutions. The situation was changed by the tourist voucher (in August 2020), which was supposed to provide financial support for Polish families and help the tourism

[3] The study was carried out by PBS Sp. z o.o. at the request of the Polish Tourist Organization, from 15 to 17 June 2020, N = 1000.

industry weakened by the pandemic. Tourists, in a way, could take advantage of the situation to rest in a facility of a higher standard than they had planned (the change of a lower standard in Poland and abroad, to a higher standard in Poland).

The national quarantine introduced in Poland from December 28 to January 31 prevented Poles from participating in domestic tourist trips. Additionally, restrictions were introduced by most countries, which also closed the possibility of foreign trips. However, Poles tired of the restrictions and longing for trips are showing great willingness to return to tourism, as evidenced by the level of their interest in trips shortly after the government's decision to reopen hotels. In the first week of February 2021, Travelist.pl saw a huge increase in requests for hotel stays, more than double that of the last week of January 2021 (+123%!). Dominated by inquiries and reservations for stays in the mountains, tourists want to make up for lost holidays, so they plan extended weekends in the south of Poland. In the TOP10 were, among others, the Opawskie Mountains, Szklarska Poręba and Karpacz, but also two seaside towns: Kołobrzeg and Gdańsk (Hotelarz, 2021). One might be tempted to say that the pandemic has not reduced the demand for travel.

## 1.5. Conclusions

As indicated by the attached data, the Covid-19 pandemic does not have to be the factor slowing travels, as it may affect internal substitution on the tourism market.

Tired after the first stage of the lockdown but fearing for their safety, Poles were looking for places away from other tourists, places off the beaten track, cottages or guest houses by the lake or by the sea. Large hotels were often (but not always) avoided, and foreign trips were replaced by domestic ones. Due to the reduction of family budgets in almost half of the households there was a change to cheaper travel options. However, the introduction of the holiday voucher by the government led to the development of tourist traffic in August 2020, some noted that other segments of tourism – instead of business tourism, there appeared families with children – benefited from higher standard tourist facilities. Therefore, in the situation of the Covid-19 pandemic, all internal substitution options listed in the introductory part of the chapter were noticed on the tourism market in Poland.

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