

9. Substitution of tourism trips as a result of the COVID-19 pandemic—an empirical verification



Agnieszka Niezgoda
University of Economics and Business
Agnieszka.niezgoda@ue.poznan.pl



Ewa Markiewicz
Adam Mickiewicz University, Poznań
Ewa.markiewicz@amu.edu.pl

Abstract

Purpose: The aim of this chapter is to empirically verify the thesis (set out in the previous work) regarding the substitution changes in the tourism market caused by the COVID-19 pandemic. The question was posed as to whether the travel substitution caused by the pandemic concerned substitution internal or external to the offer of the tourism market.

Design/methodology/approach: Qualitative research was conducted on the supply side and the demand side of the tourism market. The supply-side research comprised a direct (non-standardised) interview among representatives of the three main tour operators organising tourist trips on the Polish market. The demand study used a direct standardised interview method using an interview questionnaire.

Findings: The results of the research showed internal substitution processes in the tourism market triggered by the COVID-19 pandemic. The changes affected trips to a slightly greater extent in 2020 than in 2021. The research showed lower external substitution, meaning that during the pandemic consumers did not want to give up tourism trips.

Research limitations/implications: The research confirms the findings of other authors that the pandemic treated as a transformative force in tourism and hospitality, while the relatively short time after its end prevents long-term conclusions.

Practical implications: The results can be used by service providers, to anticipate changes caused by contingencies, as well as to predict trends in tourism product design.

Suggested citation

Niezgoda, A., & Markiewicz, E. (2024). Substitution of tourism trips as a result of the COVID-19 pandemic—an empirical verification. In E. Mińska-Struzik & B. Jankowska (Eds.), *Is there any “new normal”?* *Economics of the turmoil* (pp. 163–173). Poznań University of Economics and Business Press. <https://doi.org/10.18559/978-83-8211-217-7/9>



This book is available under the Creative Commons 4.0 license—Attribution-NonCommercial-NoDerivative 4.0 International

Social implications: The research indicates the direction of change that a pandemic may provide a starting point for further observations.

Originality and value: Most of the analysis is limited to quantitative phenomena related to the reduction of tourism trips as a result of the COVID-19 pandemic. The originality of the article is based on the analysis of the substitution processes in the tourism market by internal and external substitution. The added value is the simultaneity of the study on both the demand and the supply side of tourism.

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

Introduction

As shown in previous works (Kowalska & Niezgoda, 2020; Niezgoda et al., 2021), due to the restrictions caused by the COVID-19 pandemic, Polish tourists were forced to change their holiday plans. Due to the threat, governments introduced travel restrictions affecting tourism businesses, resulting in substitutionary changes in the tourism market.

The question arises as to whether these changes concerned substitution internal or external to the tourism market. Internal substitution refers to the replacement of tourism services and goods with other services also of a tourism nature, i.e. it concerns the replacement of different types of tourism trips with other trips involving services of a similar or different standard. According to the works of other authors (Dziedzic & Skalska, 2012; Mazurek-Kusiak, 2019), internal substitution enhances competitiveness between enterprises in the tourism market, but at the same time improves the quality of tourism services and products. External substitution, on the other hand, poses a threat to the tourism services sector as it involves the substitution of goods and services in the tourism market with other services and goods. During the pandemic, such substitution occurred when potential tourists substituted a tourist trip with recreation at home, recreation at home or other activities (e.g., work).

The aim of this chapter is to empirically verify the thesis on substitution changes in the tourism market caused by the COVID-19 pandemic. In order to verify the thesis of substitution in the tourism market, the results of qualitative research conducted on the supply side and on the tourism demand side will be presented. The supply-side research involved a direct (non-standardised) interview among representatives of three main tour operators organising tourist trips on the Polish market. The demand study used a direct standardised interview method using an interview questionnaire. The following section briefly discusses the methodology and results of the survey.

9.1. Research methodology

The face-to-face interview on the supply side included 3 purposely selected representatives of tour operators. The demand survey used purposive sampling, the sample consisted of 50 people aged 16 and older, including 29 women (58%) and 21 men (42%). The predominant group among the respondents had tertiary education (50%) and secondary education (48%). The survey was conducted between November 2022 and January 2023.

The specific objective of the survey was to answer the following questions:

- 1) Did the COVID-19 pandemic trigger changes in tourist travel decisions?
- 2) Did these changes occur within the framework of internal substitution in the tourism market?
- 3) What specific trends can be observed in exit substitution?
- 4) Can it be thought that they will influence the decisions of consumers of tourism services after the pandemic has ended?
- 5) Has an external substitution caused by the pandemic been noticed?

9.2. Empirical findings

The first question asked to respondents was to determine their preferred types of trips and their frequency prior to the outbreak of pandemic COVID-19. More than half of respondents (52%) went on short trips several times a year, 34% of respondents chose one longer trip (lasting at least one week) and 28% of respondents chose several longer trips per year. 10% of respondents chose one short trip per year (Figure 9.1).

It should therefore be concluded that the respondents participated in the trips and, moreover, in the next question, as many as 70% said that they wanted to

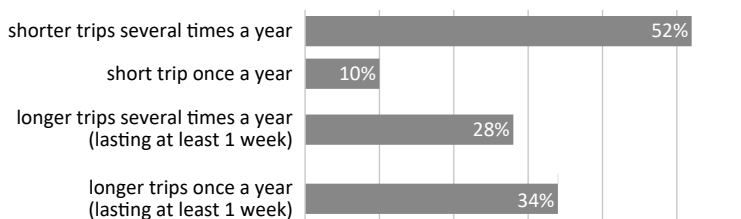


Figure 9.1. How often did you travel before the COVID-19 pandemic?

Source: own study.

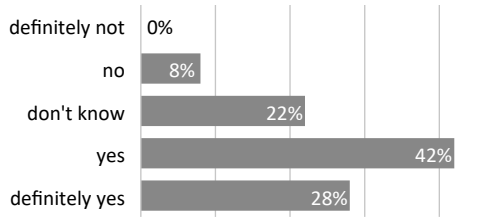


Figure 9.2. Before the COVID-19 pandemic, did you want to travel more and more?

Source: own study.

travel more often than they declared before the pandemic. Only 8% of respondents answered this question negatively (Figure 9.2).

Thus, it can be concluded that the outbreak of the pandemic came at a time when the extremely dynamic growth of tourism worldwide was leading to the unfavourable phenomena known as overtourism. The growth trends of the tourism market were leading to overtourism (Peeters et al., 2018; Tiwari & Chowdhary, 2021; UNWTO, 2018).

These observations are confirmed by the interview with tour operators. All tour operators observed an upward trend in tourist traffic, and pilots operating tours in 2019 complained that there was too much tourist traffic in the attraction regions, which made it difficult to conduct tours properly to guarantee a high quality reception of the attractions by tourists.

Among all (100%) of the tourists surveyed, the pandemic triggered changes in tour plans in the first year of the restrictions (2020). In the following year (2021), only 86% of those surveyed changed their holiday plans. The reason for this may have been the easing of restrictions in many countries on tourist trips in 2021 compared to the previous year, when the pandemic broke out, as well as some habituation of tourists to the restrictions, who noticed that in 2020, especially from mid-July onwards, flights and tourist trips started to take place. This observation is confirmed by representatives of tour operators. One of them highlighted that in 2020, despite the restrictions, there were customers who wanted to see famous places that, exceptionally during the pandemic, were not crowded. On the tourism supply side, it was also noted that there was more fluidity in the offers that came from foreign contractors. These included hotels in attractive locations that only had rooms available during the pandemic period, particularly in 2020.

The next part of the study looked at internal substitution processes in the tourism market. For 38% respondents, the COVID-19 pandemic caused a change from a tourist trip planned abroad to a similar tourist trip at home with the required

standard (e.g., a stay in a foreign hotel with an all-inclusive option exchanged for such a stay in a resort in Poland) in 2020. In 2021, this change occurred in almost 28% of respondents. It can be seen that in the first year of the pandemic, more people switched from a foreign trip to the same type of trip in Poland. This may be related to the easing of travel restrictions that took place at the beginning of summer 2020. In one of the tour operator offices surveyed, it was found that as late as the beginning of July 2020, cities in the international flight schedule were being changed and customers were confused. Almost 60% of respondents surveyed who chose the above change in 2020 and more than 40% in 2021 were satisfied with it. However, this did not affect the choice of this type of trip after the pandemic (almost 90% of respondents in 2020 and more than 90% in 2021).

Another reported change was the replacement of a tourist trip planned abroad with a trip at home, but changed in terms of the standard of service and adapted to the pandemic constraints. This refers to swapping a higher standard abroad, for a lower standard in Poland (e.g., swapping a stay in a foreign hotel with an all-inclusive option for a holiday in a motorhome in Poland). In 2020, such a change was reported by 32% and in 2021 by 25.6% of respondents. In this case, it can also be seen that 2021 resulted in fewer changes. However, in an open-ended question, several respondents clearly stated that this choice was dictated by a desire to take care of their own health. In 2020, more than 55% of respondents were satisfied with this type of change, but 75% did not declare this choice after the pandemic. In 2021, almost 50% of respondents reported satisfaction, while more than 60% also indicated no such change after the pandemic.

In third place, in terms of the number of responses, was the substitution of a tourist trip planned abroad for a trip in the country, but changed in terms of the standard of services and adjusted to pandemic constraints, i.e. the substitution of a lower standard abroad for a higher standard in Poland (e.g., the substitution of a stay in a foreign hotel for a stay in a higher standard hotel in Poland). Such a change was declared by 14% in 2020 and by 23.3% of respondents in 2021. It can be assumed that these people treated the lack of a foreign trip as an opportunity to benefit from better leisure conditions in Poland.

The surveyed representatives of tour operators also indicated a high interest in expensive and luxurious tourist facilities in Poland in the summer of 2020. The motivation for this choice by customers was concern for health (higher standard suggests better hygiene protection), but also a desire to rest from various restrictions and fulfil previous dreams. The satisfaction rate for such a change in the years surveyed was just over 70 and 80% respectively, and the declaration of a post-pandemic change was 86% and 80%.

Another option for substitution was to choose a tourist trip planned in Poland for another domestic trip but changed in terms of the standard of services and

adjusted to the pandemic restrictions, i.e. changing a higher standard in Poland for a lower standard in Poland (e.g., swapping a stay in a Polish hotel with an all-inclusive option for a holiday in a motorhome). This type of substitution was shown by 12% of respondents in 2020 and 6.9% in 2021. It can be thought that the choice of motorhomes was not related to a preference for leisure methods, but to safety restrictions. Staying in chalets, tents and caravans in 2020 was extremely popular due to the lack of direct contact with neighbours. Survey results show that the number of people interested in such a swap nearly halved in the second year of the pandemic, when the strictures were reduced. Tour operator representatives confirmed the observations of greater interest in choosing accommodation in free-standing facilities during the first year of the pandemic. All respondents surveyed who indicated this type of substitution were satisfied with the change (in both 2020 and 2021). Only less than 17% of respondents in 2020 declared that they would choose this substitution option after the pandemic (in 2021 the number of such responses was 0).

Another option is the 'reverse' choice, i.e. swapping a lower standard in Poland, for a higher standard in Poland (e.g., swapping a stay in a holiday resort swapped for a stay in a Polish high standard hotel). This option was used by only 6% of respondents in 2020 and 6.9% of respondents in 2021. High-standard hotels are often characterised by a large number of guests and this may have been the reason for health safety concerns. Another explanation for this low number of people who chose this option could be that the outbreak of the pandemic caused public anxiety about income provision and even a real reduction in income due to the closure of many jobs and a decrease in turnover in the service sector. This may have been the reason for the lack of seeking offers in higher standard facilities nationally. All survey respondents indicating this form of substitution were satisfied with such a change. In terms of its impact on post-pandemic tourism trips: only the change in 2021 had an impact on a similar choice of post-pandemic tourism trip for 33% of respondents. The change indicated in 2020 did not affect the choice of this type of post-pandemic trip for any of the respondents surveyed.

Another type of substitution was the replacement of a foreign trip, with another foreign trip. Such a process was noted in 6% of respondents in 2020 and 4% of respondents in 2021. Respondents indicated that they had chosen a different foreign trip due to the fact that the restrictions in the previously planned country were too restrictive and therefore sought an offer in a country where the bans were more lenient. Satisfaction with the change for both 2020 and 2021 was reported by all respondents indicating this type of substitution. A change in trips was declared by 50% in 2020 and 40% in 2021.

A comprehensive summary of the results of the internal substitution surveys is provided in Table 9.1.

Table 9.1. Internal substitution in the tourism market during the COVID-19 pandemic in 2020 and 2021

The pandemic has resulted in the replacement of the tourist trip:		2020 N = 50 (%)	2021 N = 43 (%)
1.	planned abroad for a similar tourist trip at home, maintaining the required standard (e.g. a stay in a foreign hotel with an all-inclusive option exchanged for such a stay in a resort in Poland)	38.0	27.91
	Were you satisfied with the change of this trip? (% answer YES)	57.9	42
	Did the change influence your choice of this type of trip after the pandemic? (% answer NO)	89.5	91.6
2.	planned abroad for a trip at home, but changed in terms of the standard of services and adjusted to pandemic constraints, i.e. exchange of a lower standard abroad for a higher standard in Poland (e.g., exchange of a stay in a foreign hotel for a stay in a higher standard hotel in Poland)	14.0	23.26
	Were you satisfied with the change of this trip? (% answer YES)	71.4	80.0
	Did the change influence your choice of this type of trip after the pandemic? (% answer NO)	85.7	80.0
3.	planned abroad for a trip at home, but changed in terms of the standard of services and adjusted to pandemic constraints, i.e. swapping a higher standard abroad for a lower standard in Poland (e.g., swapping a stay in a foreign hotel with an all-inclusive option for a holiday in a mobile home in Poland)	32.0	25.58
	Were you satisfied with the change of this trip? (% answer YES)	56.2	45.5
	Did the change influence your choice of this type of trip after the pandemic? (% answer NO)	75.0	63.6
4.	planned abroad to a trip abroad adapted to pandemic constraints	6.0	4.0
	Were you satisfied with the change of this trip? (% answer YES)	100.0	100.0
	Did the change influence your choice of this type of trip after the pandemic? (% answer NO)	50.0	60.0
5.	planned in Poland for another domestic trip, but changed in terms of the standard of services and adjusted to pandemic constraints, i.e. exchange of a higher standard in Poland for a lower standard in Poland (e.g., exchange of a stay in a Polish hotel with an all-inclusive option for a holiday in a mobile home)	12.0	6.9

Table 9.1 – cont.

The pandemic has resulted in the replacement of the tourist trip:		2020 <i>N</i> = 50 (%)	2021 <i>N</i> = 43 (%)
	Were you satisfied with the change of this trip? (% answer YES)	100.0	100.0
	Did the change influence your choice of this type of trip after the pandemic? (% answer NO)	83.3	100.0
6.	planned in Poland for another domestic trip, but changed in terms of the standard of services and adjusted to the pandemic constraints, exchange of a lower standard in Poland for a higher standard in Poland (e.g., exchange of a stay in a holiday resort for a stay in a high-standard Polish hotel)	6.0	6.9
	Were you satisfied with the change of this trip? (% answer YES)	100.0	100.0
	Did the change influence your choice of this type of trip after the pandemic? (% answer NO)	100.0	66.7

Source: own study.

In summary, it can be seen that internal substitution processes in the tourism market among respondents were noticeable to a greater extent in 2020, but the substitution involved either choosing the same standard of facility at home rather than abroad or swapping a higher standard in a foreign destination for a lower standard in Poland. However, the choice of facilities in Poland was not based on a preference for the type of facility, but on the fact that the lower standard, which was the offer of cottages, caravans was due to the isolation possibilities recommended during the pandemic period.

Another possibility in the tourism market during the COVID-19 pandemic period was the abandonment of trips and possible external substitution of tourism trips. In 2020, 8% and in 2021, 10% of respondents abandoned their trips. These were mainly older people with higher education. These figures indicate that respondents are used to tourist trips and mostly chose to substitute trips within the tourist market.

Of the possibilities indicated as a substitute for trips, 60% of people chose passive leisure (e.g., reading books, listening to audio books, watching films) and 50% indicated physical recreation at home (indoors or outdoors). The third most popular choice was to replace tourist trips with developing one's own interests (e.g., learning to play an instrument, cooking courses, beauty academy workshops or photography). This choice was declared by 42% of respondents. During the pandemic, social problems related to the need for contact with other people

were indicated. Among the people surveyed, as many as 36% indicated that they swapped tourist trips for activity on social networks, which, in relation to playing on the computer, indicated in the other category (only 4%), is a high number and shows the need for interpersonal activity. 34% of respondents devoted this time to renovating their house or flat and the same number indicated occupying themselves with professional work. A summary of the survey results for external substitution is provided in Figure 9.3.

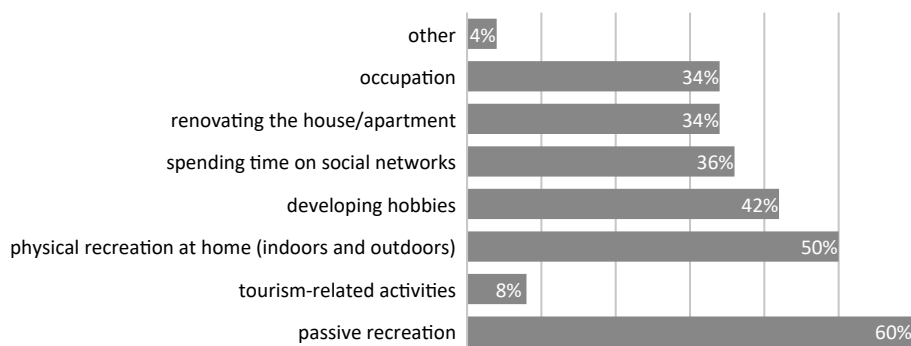


Figure 9.3. What did you replace your tourist trips with during the COVID-19 pandemic?

Source: own study.

As previous research has shown (Niezgoda & Markiewicz, 2022), the managers of tourist attractions during the pandemic period undertook activities related to showing the attractiveness of places and regions in virtual space. Virtual walks, lectures at attractions, competitions and other activities were organised to showcase a place instead of a tourist visit. However, only 8% of the people surveyed chose this form of substitution for a tourist activity. Respondents watched tourism films and materials posted by tourism organisers and managers of tourist attractions.

An analysis of the correlation of responses regarding external substitution during the COVID-19 pandemic with the characteristics of the respondents surveyed revealed the following relationships. Women were more likely to choose passive leisure (69%) and physical recreation at their place of residence (55%), while men were more likely to choose developing their interests (57%), renovating their house/apartment (38%) and taking care of their work (38%). Passive leisure was chosen by people irrespective of age, with young people (16–25) with secondary education more likely to choose spending time on social networks (67%), with interest in physical recreation at home increasing with age (irrespective of

education) (50%, 50%, 57%, 100% respectively). As previously mentioned, activities related to tourism topics were undertaken by only 8% of respondents, these were mainly women aged 41–60 with secondary and tertiary education.

In an extended variant of the possibility of external substitution, respondents were asked whether they had attended a remote cultural event during the pandemic period, e.g., a visit to a museum, a theatre performance, a concert, or not. Only just over a third (36%) answered in the affirmative, indicating that such a substitution process is not evident. This type of substitution was mainly chosen by women (67%) aged 41–60 (50%) with a university education (78%).

Conclusions

The results of the study showed the processes of substitution in the tourism market caused by the COVID-19 pandemic. The vast majority of respondents did not abandon their trips, but due to restrictions and fear for their own health, they swapped their planned trips for others. This is an internal substitution in the tourism market, and respondents mainly indicated changes from a foreign trip to a domestic trip, but with the planned standard of service maintained. The survey noted that the changes in travel plans were slightly more applicable to trips in 2020 than in 2021. These conclusions are confirmed by the representatives of the tour operators surveyed. The vast majority (80.8%) of respondents were satisfied with the change. Such responses may indicate the important role of tourism in the lives of those surveyed and the regenerative function of the anticipated trip during the difficult pandemic period. Although respondents were satisfied, the majority (77.2%) would not stay with the changed choice and would like to return to their old types of preferred trips after the pandemic.

The study showed lower external substitution. Among the activities that replaced tourist trips, passive leisure (watching films, reading books, etc.), physical recreation at home and developing interests were most frequently mentioned. Substitute forms of tourist activities created by tour operators were not popular among respondents. Only 8% of respondents took advantage of virtual visits to attractions and watching tourism-related films. The results may indicate that respondents are used to tourist trips and want to return to normality, their plans and habits in this regard (Brouder et al., 2020). The study confirms the results of other authors that the pandemic considered as a transformative force in tourism and hospitality (Brouder, 2020) did not contribute to the creation of new travel habits, but rather was exceptional and incidental in nature.

The conclusion for practice, therefore, is the need for a continuous study of the tourism market, where no conversion of previous habits to virtual travel has

been observed. A limitation of the study is that changes in consumer choices in the tourism market are affected by many different factors, among which it is difficult to isolate only the impact of the pandemic. Therefore, it is necessary to observe the market and take into account the processes caused by the COVID-19 pandemic and their relationship to changes in the socio-economic environment.

References

- Brouder, P. (2020). Reset redux: Possible evolutionary pathways towards the transformation of tourism in a COVID-19 world. *Tourism Geographies*, 22(3), 484–490. <https://doi.org/10.1080/14616688.2020.1760928>
- Brouder, P., Teoh, S., Salazar, N. B., Mostafanezhad, M., Pung, J. M., Lapointe, D., Higgins Desbiolles, F., Haywood, M., Hall, C. M., & Clausen, H. B. (2020). Reflections and discussions: Tourism matters in the new normal post COVID-19. *Tourism Geographies*, 22(3), 735–746. <https://doi.org/10.1080/14616688.2020.1770325>
- Dziedzic, E., & Skalska, T. (2012). *Ekonomiczne uwarunkowania rozwoju usług turystycznych w Polsce*. Stowarzyszenie na Rzecz Badania, Rozwoju i Promocji Turystyki.
- Kowalska, K., & Niezgoda, A. (2020). COVID-19 as a tourist activity inhibitor as evidenced by Poles' holiday plans. *Studia Periegetica*, 4(32), 9–24. <https://doi.org/10.5604/01.3001.0014.6526>
- Mazurek-Kusiak, A. K. (2019). *Model zachowań konsumentów na rynku turystycznym*. Sarium.
- Niezgoda, A., & Markiewicz, E. (2022). Produkt turystyczny w parkach narodowych – skutki pandemii COVID-19. *Prace Komisji Geografii Przemysłu Polskiego Towarzystwa Geograficznego*, 36(2), 177–189. <https://doi.org/10.24917/20801653.362.11>
- Niezgoda, A., Markiewicz, E., & Kowalska, K. (2021). Internal substitution in the tourism market: Effects of the COVID-19 pandemic. In E. Mińska-Struzik & B. Jankowska (Eds.), *Towards the “new normal” after Covid-19 – a post-transition economy perspective* (pp. 127–136). Poznań University of Economics and Business.
- Peeters, P., Gössling, S., Klijs, J., Milano C., Novelli, M., Dijkmans, C. H. S., Eijgelaar, E., Hartman, J., Heslinga, J., Isaac, R., Mitas, O., Moretti, S., Nawijn, J., Papp, B., & Postma, A. (2018). *Research for TRAN, Committee – Overtourism: Impact and possible policy responses*. European Parliament, Policy Department for Structural and Cohesion Policies.
- Tiwari, P., & Chowdhary, N. (2021). Czy pandemia COVID-19 czasowo zatrzymała zjawisko overtourism? *Turyzm*, 31(1), 91–96.
- UNWTO. (2018). *‘Overtourism’? – Understanding and managing urban tourism growth beyond perceptions, executive summary*. <https://doi.org/10.18111/9789284420070>