TOURISM DURING COVID-19 - SEASONALITY IS AN OPPORTUNITY OR STILL A THREAT?

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Abstract: *The global economy and society have never faced the COVID-19 pandemic. One of the sectors most affected by the pandemic was tourism. As a result of the administrative lockdown and the ban on flights, virtually all tourist destinations in the world were unavailable for some time, and domestic tourism was very limited. Tourism was hit hardest by the restrictions of the Covid-19 pandemic. However, the release of tourism in the tourist season caused seasonal tourism to lose the least in the tourism sector.m jest pandemia COVID-19.*
The aim of this article is to try to answer the following questions: does the high seasonality of tourism demand reduce the negative effects of the COVID-19 pandemic for seasonal businesses, and if so, when is the number of visitors expected to return to the pre-pandemic level. In order to solve this research problem, an analysis of the trends in changes in the number of tourists and the number of overnight stays in the Baltic coastal region, i.e. in the region with the highest seasonal fluctuations, was performed.

Key words: *tourist, bed places, seasonality, seaside region, Poland*

Intruduction

The outbreak of the Covid-19 pandemic has serious economic and social consequences. The situation has changed the rules of operation of enterprises, and also the habits and behavior of consumers have changed [1]. One of the industries most affected by the pandemic was broadly understood tourism [2, 3]. The regulations and entry restrictions mainly related to temporary travel and mobility bans, while the restrictions applied to foreign travel. International tourism has been almost completely suspended and domestic tourism has been significantly reduced [4]. Administrative regulations prohibited certain types of economic activity, which is why many tourist enterprises stopped operating in the first period.

The coronavirus pandemic has demonstrated the importance of domestic tourism, which has fueled and continues to drive the revival of the tourism sector throughout its lifetime. Traveling close to home, outdoor activities and rural tourism are trends that have stimulated domestic tourism in both 2020 and 2021 from the first tourist season of the pandemic. UNWTO experts predict that domestic tourism will continue in the coming years. The main obstacles to the development of domestic tourism in 2022 and beyond may be health security, the availability of domestic flights, internal travel restrictions and the duration of the quarantine.

The concerns of tourists related to the pandemic made tourists more willing to visit small places and accommodation, there was a boom in mobile tourism (motorhome). Local, health and active tourism had better development prospects. Tourists have also changed the way of booking a trip, now a short-term booking with the possibility of free cancellation is required. The COVID-19 pandemic is also a major technological leap. Due to the need to maintain social distance, chatbots, hotels and restaurants search engines, registration points were lovated in hotel and airport.

MICE sites, business and tourism are still characterized by greater uncertainty - full recovery to pre-pandemic levels will still have to wait, although their future is still uncertain.

Tourist restrictions were high but temporary. During the two years of the pandemic, the tourism sector, i.e. accommodation and catering activities, was closed and opened alternately. Relatively large freedom took place during the summer periods, both in 2020 and 2021. It was then that the demand for tourist goods and services opened up seasonal economic activity in recreational tourism regions. Reducing the restrictions and high seasonality of tourist demand made it possible to limit the losses. Tourists took advantage of holidays in the countryside en masse, but they changed the way they travel and relax.

The aim of the article is to present the impact of the Covid-19 pandemic on tourist arrivals and accommodation in areas with high seasonal fluctuations in the peaks of the 2020 and 2021 seasons. The basic research problem focused on answering the following questions: does the high seasonality of tourist demand reduce the negative effects of the Covid-19 pandemic, and if so, when should the number of tourists visiting the level return?

Research method and data sources

The empirical analysis focused on: (i) presentation of the situation of the hotel industry, i.e. changes in the number of tourists and the number of overnight stays during the COVID-19 crisis in Poland, (ii) general characteristics of the Polish seaside tourist area in the context of covid-19 problems and (iii) changes in the number of tourists and the number of overnight stays in the 2019, 2020, 2021 seasons in an area with high seasonal fluctuations, i.e. in the Polish seaside area.

The data used in the study came from the Polish national statistics - the database of the Central Statistical Office, ie Local Data Bank. The research used information on the number of tourist facilities, the total number of tourists and the number of overnight stays. The data was collected in two spatial contexts: for Poland and for areas classified as the Polish seaside area. The main horizon of the analysis covered the years 2019, 2020, 2021, although where a broader context of the analysis could be presented, the time range was extended.

The collected data was analyzed over time and the basic indicators describing changes in the tourist demand situation during the covid-19 pandemic in Poland and on the Polish coast were presented.

The research results

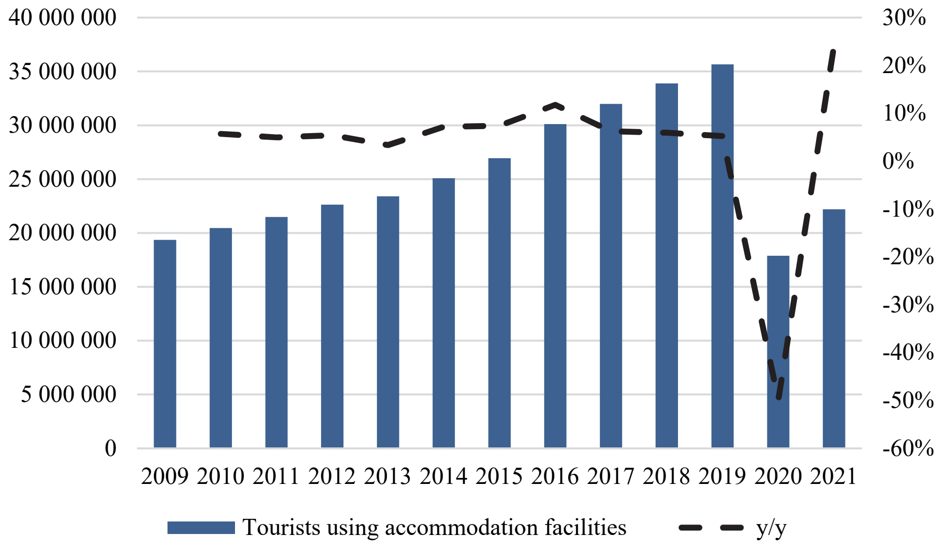
The structure of the Polish economy is similar to the structure of the economies of other developed countries in Europe and in the world. The service sector covers most of the economy – at the end of 2020, 76% of all registered business entities were entities conducting service activities [5], the so-called third sector. The second group of enterprises – the second sector and 22% of economic entities are entities from the industrial sector. The remaining, the smallest group of enterprises (2% of operating enterprises) are agricultural enterprises, known as enterprises of the first sector. Tourism - tourist activity belongs to the first and most numerous group of enterprises – the third sector of the economy. Most often, tourist services are provided by enterprises providing accommodation and catering services. In the Polish economy, enterprises whose predominant activity is designated as tourist activity constitute approx. 3% of all entities conducting activity.

The Polish sector of accommodation services consists of facilities that carry out activities related to accommodation. The most numerous group are hotels and similar accommodation facilities, another class of accommodation facilities are short-term accommodation, i.e. summer camps, holiday centers, training and recreation centers, hostels, agritourism and the so-called Other entities related to the accommodation of tourists conduct camping activities.

The COVID-19 pandemic was a crisis that limited activity in all sectors of the economy. The health crisis and related administrative constraints resulted in the closure of a significant number of businesses. Economic rescue packages made it possible to survive and provided a chance to adapt to the new reality. The restrictions were of a sectoral nature, and the vast majority of them related to the tourism industry. In Poland, hotels and accommodation facilities were closed for the first months of 2020, with the exception of providing accommodation to quarantine people, doctors and delegates. The Polish government, like the governments of other countries in the world, introduced restrictions on the movement of people, which resulted in limiting the movement of tourists. Figures 1 and 2 present the situation in the hotel and accommodation industry in Poland.

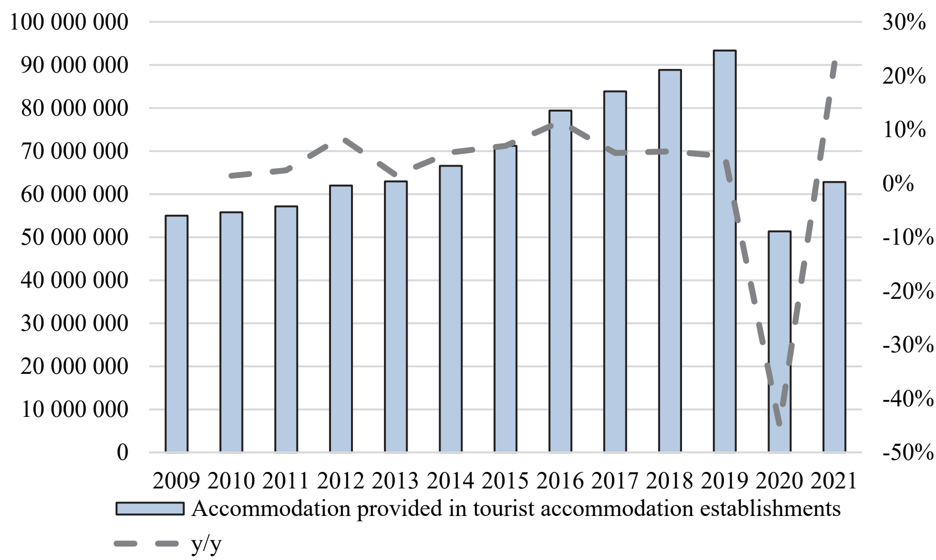
The data in Figures 1 and 2 show large losses in the number of tourists and the number of tourists allocated to them during the pandemic crisis in Poland and around the world. 2020 was a difficult year for the accommodation industry in Poland. The Polish tourism sector then recorded a 50% decrease in the number of tourists, with a 45% reduction in the number of overnight stays. A significant decrease in demand for accommodation services measured by the number of overnight stays in tourist establishments in total resulted in the closure of tourist establishments in 2020 and 2021. In 2021, the total number of tourist facilities in Poland was 31/12/2021 - 9,942 tourist facilities [6] and was lower by 349 facilities compared to 2020 and by 1,309 facilities compared to 2019. just as the still uncertain pandemic situation is not optimistic. It will take some time for the tourism industry to return to pre-pandemic levels in terms of tourist numbers and overnight stays provided. The average monthly number of tourists per 1 tourist facility and the average monthly number of nights per 1 tourist facility are presented in Table 1. The conclusions from the analysis confirm the difficult situation of the accommodation industry in Poland.

Figure 1. *Tourists using accommodation facilities in Poland in 2009-2021*



Source: own elaboration based on GUS data [5].

Figure 2. *Accommodation provided in tourist accommodation establishments in Poland 2009-2021*



Source: own elaboration based on GUS data [5].

Table 1. Changes in the average monthly number of tourists visiting tourist facilities and the average monthly number of nights per 1 tourist facility in Poland in 2019-2021

	2012	2015	2018	2019	2020	2021
the average monthly number of tourists per 1 tourist facility	198	223	255	264	144	186
the average monthly number of nights per 1 tourist facility	544	592	668	691	416	526

Source: own elaboration based on GUS data [5].

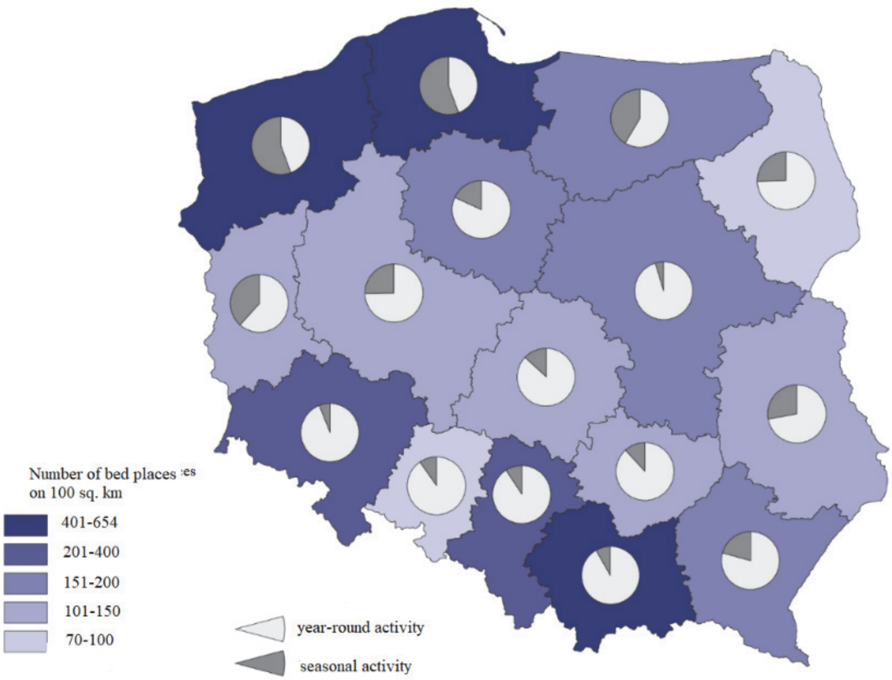
The Covid-19 crisis in the tourism industry, as in the economy, has its winners and losers. The biggest losers turned out to be the event industry, which due to restrictions and restrictions completely suspended its activities for several months. Tourist offices offering leisure outside Poland lost out. On the other hand, domestic tourism, tourism „close to home“ has gained in importance, experts also see an opportunity for the development of urban tourism.

The closure of the accommodation base, both in the period of the first, second and third lockdowns, took place during the „rest“ period of the tourist sector, i.e. down-season. On the other hand, restrictions have been lifted during the summer periods. Paradoxically, seasonality which under normal conditions complicates tourist and accommodation activities, during the covid-19 period, it saved tourist enterprises from losses. Due to the high seasonality of tourism in selected regions, the losses of enterprises operating there were small. Seasonality affects all tourism enterprises, but there are areas that are particularly exposed to seasonal fluctuations in tourism demand.

The basic specificity of the tourism industry is seasonality. Seasonality disturbs the functioning of the organization and the continuation of negative participants, e.g. difficulties with adjusting the prices of tourist services during the year are required [7, 8], for the duration of the journey and seasonal employment and unemployment [9, 10]. The literature also mentiones that the seasonality of tourism is related to national connections during peak periods and social work performance [11].

In Poland, the areas particularly exposed to seasonal fluctuations are located in the coastal areas (north of Poland) and mountain areas (south), and these are the regions with the largest number of beds per 100 km2 - which is indicated by the intensity of colors in Figure 3. Analysis structure of objects (all-year-round vs. seasonal objects) allows us to conclude that the seaside region is characterized by the highest share of seasonal objects. More than half of the accommodation facilities in this area operate only in the tourist season.

Figure 3. Accommodation places in tourist accommodation establishments in 2021- as of 31 VII



Source: [6].

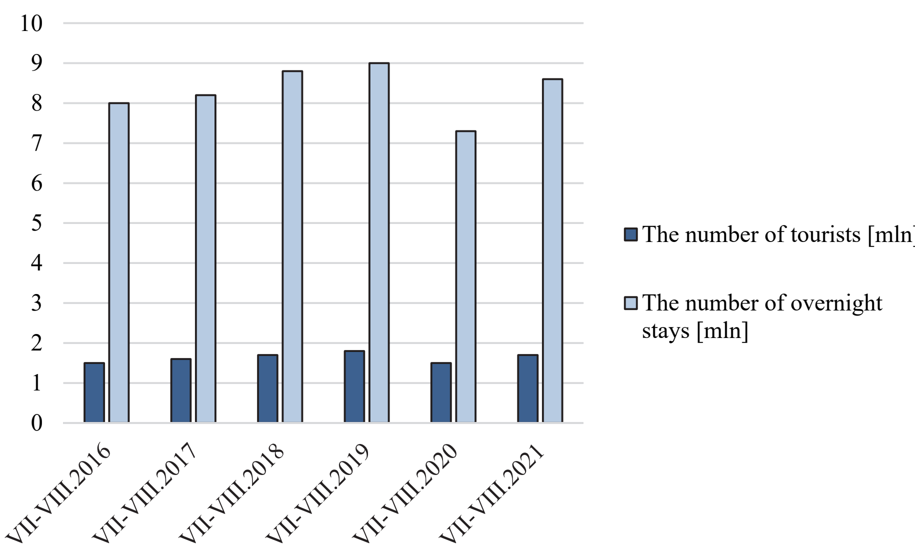
In Poland, according to the Eurostat methodology [12] adopted for the purposes of tourism statistics, coastal areas are considered to be coastal areas consisting of municipalities bordering the sea or located near it. Coastal areas, unlike the others, are classified on the basis of the distance of a given commune from the sea: if the commune borders the sea, it is in principle coastal; if a commune does not border the sea, but 50% of its surface area is 10 km from the sea, it is also considered to be a coastal commune. In agreement with Eurostat, additional seven communes in Poland, despite not meeting these conditions, were considered coastal. The area of 55 communes classified as seaside communes is presented in Figure 4.

Figure 4. Area of coastal communes according to Eurostat methodology

Source: [12].

To illustrate the impact of the covid-19 pandemic on the functioning of accommodation-related enterprises, in the next step of the analysis, the number of tourists and the number of overnight stays in the seaside area in Poland in the tourist seasons 2016, 2017, 2018, 2019, 2020 and 2021 were observed. The summary is presented in Figure 5. The analysis of the data on both the number of tourists and the number of overnight stays during the 2020 and 2021 season shows that coastal tourism recorded a decline in both the number of tourists and the number of overnight stays provided, however, these reductions were not as noticeable as in the case of Poland, i.e. areas with lower seasonal variations.

Figure 5. The number of tourists and the number of overnight stays in the seaside area in Poland in the tourist seasons 2016 -2021



Source: own elaboration based on GUS data [6].

The number of tourists and the number of overnight stays in the coastal area in the 2020 season were lower, but the decrease was not as noticeable as in the case of data for Poland. The number of tourists decreased by 17%, while for Poland the decrease was 50%. The situation was similar with the number of overnight stays – in the coastal area, the number of overnight stays decreased by 19%, while at the same time the number of overnight stays decreased by 45%. If we compare the data on the number of tourists and the number of overnight stays with the decreasing number of accommodation establishments in the coastal area (in 2021, there were 2,342 accommodation establishments in the seaside region in Poland and there were less of them compared to 2020 by 160, and compared to 2019 r. as much as 358). The decrease in the number of facilities and the slight decrease in the number of tourists and the number of overnight stays observed mean that the use of the database, measured by the average number of tourists and overnight stays in facilities, was higher.

Conclusions

The results of the analyzes allow for the following conclusions:

- tourism in Poland, understood as accommodation activity, lost covid-19 during the crisis; the number of tourists decreased in the first year of the pandemic, i.e. in 2020, it was 50% lower compared to 2019 and in 2021 by 38% compared to 2019; a similar situation is observed with regard to the number of overnight stays; in Poland, the number of overnight stays decreased compared to 2019 by 45% in 2020 and by 33% in 2021;
- seasonality of tourism demand is the basic characteristic of the tourism sector; in Poland, the area with the highest share of seasonal facilities and, at the same time, the highest number of beds per 100 square km is the area on the shores of the Baltic Sea, it is in the coastal region that the greatest seasonal fluctuations in basic tourist measures are observed;
- in the coastal area, the decrease in the number of tourists visiting the seaside area and the number of overnight stays in the covid-19 period was lower than the decreases observed in Poland, in the 2020 season the number of tourists decreased by 17%, and the number of overnight stays by 19% compared to the 2019 season , in the 2021 season, both the number of tourists and the number of overnight stays were comparable to the 2019 season.

The results of the analyzes suggest that the seasonality of tourist demand in coastal areas mitigated the negative effects of the covid-19 crisis. Due to the complexity of the issues, the analyzes should be continued.

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