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Transformation of Marketing Macro-Economic Environment of Tourism with Emphasis on Changes in Mobility During COVID-19 Pandemic

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Abstract: General activity in the tourism market has been stagnating since the market paralysis caused by the COVID-19 global pandemic. The situation is difficult to predict due to political and legislative interventions, changes in the economic performance of the tourism sector, and massive changes in demand. The paper aims at depicting the current macro-economic trends that have an impact on the tourism sector, thus contributing to the formation of some basis of inputs into the discussion concerning a possible orientation of the sector and businesses and future creation of services and products in the European area. The objective is achieved using the model of PESTLE analysis based on a comparative analysis of the latest and the most recent factors of the macro-economic marketing environment, the findings of a study on a change in mobility of the inhabitants of the Czech Republic, trends in the tourism sector before and after the COVID-19 pandemic. The presented findings provide a basis for discussion on the concept orientation and the creation of tourism services and products in the Czech Republic and Europe.

Keywords: PESTLE, COVID-19, changes in mobility, tourism, macroeconomic environment

1. Introduction

In the context of the COVID-19 pandemic, which has become global and has massively affected the global economy and social sphere, responses and scenarios of its possible impact are being intensively sought. This far-reaching crisis developed suddenly and unexpectedly. Its development

in both the medium and long-term horizons is also ambiguous, and it is very difficult to make even a slightly realistic prediction. However, the prevailing opinion is that the situation will never be the same as before. The tourism sector has probably been most affected by the pandemic, as mobility of the population around the world was dramatically reduced during the pandemic. The future of the sector is difficult to predict during the growing crisis. However, it is already clear now that social and economic changes will occur, inevitably affecting mobility and the related tourism. Changes in social behavior, needs, leisure activities, the organization and place of work, etc. can be expected. The paper is focused on the identification of the major trends in society triggered by the global COVID-19 pandemic and the impact of the pandemic on the tourism sector. The goal of the paper is to identify the consequences of such changes and to predict the future orientation of the sector on the basis of monitoring the current state, available empirical evidence, and considering the previous trends in this sector. These challenges posed by these changes will be faced by governments (national, regional or local), as well as by many businesses from other sectors, as tourism is a multi-sectoral industry linked to the production activities in many other sectors.

1.1 Macro-Economic Marketing Environment

The marketing environment encompasses the entire range of factors and influences affecting the markets of national economic sectors and companies operating in them. No company can avoid these effects, as business interactions are inevitable [1-3]. Being able to respond flexibly to changes can represent a competitive advantage. Even in a situation when they seem to be an “uncontrollable force”, an active marketing approach can partially mitigate the negative effects [4-6]. For the purposes of this paper, the authors of this paper believe that the PESTLE analysis is more suitable for the tourism sector, as there has been a strong emphasis on ecology recently [7,8]. The outputs of the PESTLE analysis enable the identification of the most effective strategies concerning setting priorities, allocation of resources, preparation of time and development plans, and specification of control mechanisms [9]. The final step is the creation of the so-called “big picture” (used along with other analytical instruments such as Porter’s Five Forces or SWOT analysis). Unexpected events that occur in the macro-economic environment usually affect all factors entering the PESTLE analysis to a large or lesser extent depending on the character of such an event. Such unexpected events are also referred to as “wild cards” [10]. They are incidents that occur suddenly and unexpectedly, hence preparation for them is impossible, or there is only a very short time available. The global financial crisis in 2008 can also be considered such an event, as well as the ongoing COVID-19 pandemic or the conflict in Ukraine in 2022, which may have huge impacts on the economies of European countries and countries around the world.

1.2 Extent of the Crisis in Tourism

The crisis in the tourism sector goes far beyond this sector due to its multi-sectoral character and close interconnectedness with other sectors. It thus affects the operation of transport companies (air passenger transport, maritime transport), catering and accommodation services, tourism intermediary organizations, cultural institutions, sports clubs, etc. In 2020, a year-on-year decrease in revenues in the services sector of up to 11.7 % was recorded in the Czech Republic due to measures aimed at the reduction of spread of coronavirus [11]. The second quarter of 2021 brought a slight recovery in the sector of services, resulting in a year-on-year increase of 15.1 % (considering the low level in 2021). The most affected services during the crisis in 2020 were tourism-related services, which represented a significant average revenue decline of 70.4 % in air transport, and 37.9 % in maritime transport. Government measures aimed at limiting the spread of coronavirus affected all areas of transport, but the most significantly passenger transport [12]. The year 2020 also brought a decrease in year-on-year revenues in road transport (1.7 %), but on the other hand, a growing trend in postal and courier services (12.4 %). Revenue growth was recorded in all areas, with more than a half year-on-year increase in air transport (58.2 %) and postal and courier services, which recorded an increase by 17.7 %, and even 23.8 % in the first quarter of 2021 [12]. As a result of these changes, many jobs have been canceled or endangered [13], which lead to an increase in unemployment by approximately 1 % in the Czech Republic (the lowest value in Europe). It also poses a large risk for many companies considering further investment in flexible adaptation to changes [14]. Also, it shows that in times of crisis, it is necessary to maintain a pro-customer approach [15,16]. Tourism enterprises are saved from a complete collapse by domestic tourism both in short and medium term, although a significant decrease in its economic indicators has been recorded [17]. Performance indicators in the tourism sector and their development are regularly mapped and released by several international organizations, most commonly by the World Tourism Organization, Organization for Economic Co-operation and Development, European Commission, etc. Several studies confirm that it can be reasonably assumed that, despite the fact that the sector had previously proven resilient to economic or political crises, given such a massive economic impact, combined with the effects of the pandemic, the path to recovery will be hard and uncertain [18].

2. Data and Methods

The paper aims at depicting the current macro-economic trends that have an impact on the tourism sector, thus contributing to the creation of a basis for a discussion concerning a possible orientation of the sector and businesses, and future creation of services and products in Europe. To achieve the goal, the model of PESTLE analysis was used, where a comparison of the latest and the most recent

factors of the macro-economic marketing environment was considered, based on the results of a study on the change in mobility of the population of the Czech Republic, trends in the tourism sector before the COVID-19 pandemic, and the factors related to the COVID-19 crisis. Through a literature search, the theoretical framework of the issue, the outputs of relevant empirical studies, and the statements and recommendations of national and international organizations concerning the impact on tourism were collected. In 2020-2021, a study focused on changes in the mobility of inhabitants living in the Czech Republic was conducted. Data were collected using a questionnaire survey, where respondents living in the Czech Republic were addressed. The research sample was created on the basis of quota sampling according to the control characteristics of regional affiliation, age and gender. The online questionnaire created on the Google forms platform was distributed to the respondents, who were addressed directly by the research team. The resulting sample of respondents comprised 1,365 people (gender: 54 % female and 46 % male; economic status: 9 % entrepreneurs, 53 % employed people, 32 % students, 4 % pensioners and others). For the purposes of the research, only responses to the question of how often they used the selected modes of transport were used. The respondents chose from the scale of 2 - 7 (where 2 represented the lowest intensity - no use, and 7 represented very high intensity – daily). The data obtained were processed using descriptive statistics (arithmetic mean, standard deviation and 95% confidence interval). Subsequent processing of the data obtained from both primary and secondary sources was conducted using comparative analysis and synthesis. The results are presented within individual factors of the PESTLE analysis. In conclusion, the findings are summarized to provide a basis for discussion on the orientation of tourism products creation in the Czech Republic, and the research limitations are presented.

3. Results

The PESTLE analysis model was chosen with regard to a clear assessment of current macro-economic trends that have an impact on the hard-pressed tourism sector, with a focus on mobility.

3.1 Results of the Study on Changes in Mobility in the Czech Republic

The presented results are only partial results of the research conducted in the form of interviews with the respondents. The respondents were asked about the level of their use of selected modes of transport before and during the pandemic. The results show that the level of overall mobility during the COVID-19 pandemic decreased compared to the period before 2020. The level of use ranges from 2 to 7, where 2 indicates the lowest intensity (no use), while 7 very high intensity (daily use). The results are presented in Figure 1 as medium values along with the confidence interval of 95 %. Figure 1 clearly shows a significant decrease in the use of the modes of public passenger transport

during the pandemic. The most pronounced decrease can be seen in urban public transport, which was the most commonly used mode of transport before the pandemic.

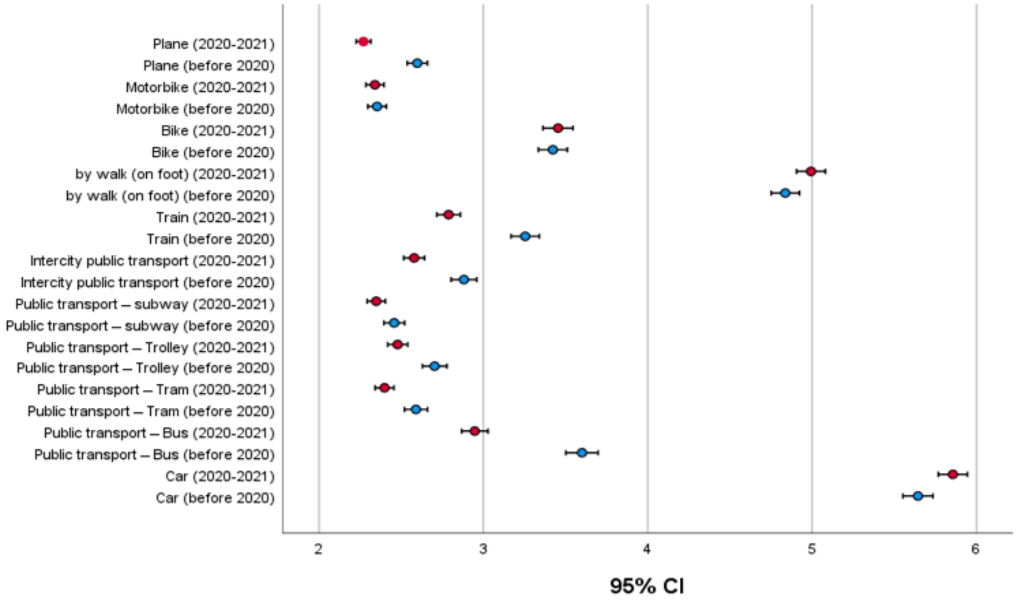


Fig. 1 Use of selected modes of transport before and during the pandemic. Source: authors

During the pandemic, its level of its use approached the level of using railway transport. Other significant decreases were recorded predominantly for the modes of transport used for longer distances: air transport, rail transport, and intercity public bus transport. In contrast, there is an undeniable increase in the use of passenger car transport and walking. These changes in mobility preferences are significant, and logically reflect the level of risk, measures adopted, and changes in work-related habits [19].

3.2 Results of PESTLE Analysis Focused on Tourism Sector and Related Mobility

Due to the COVID-19 pandemic, the macro-economic environment and its individual factors have changed. The results of the analysis show the fundamental changes in newly changed circumstances. Depicting the change dynamics is important for the implementation of new managerial decisions and strategies to mitigate or eliminate the undesirable effects of the crisis. The identification and specification of the factors concerned is based on several domestic and foreign literature, such as [20-35]. The factors of the PESTLE analysis enable a synthesis of the aforementioned literary resources.

3.2.1 Political factors

Period before COVID-19:

- Globalization influences the opening up of countries to foreign countries, which is in practice demonstrated by the abolition of visa requirements, or by enabling applicants to obtain visas electronically. However, there are still countries where visas are necessary for political reasons.

- Political stability is the key factor in the attendance of tourist destinations. Possible danger and escalation of ethnic, cultural and religious conflicts in tourist destinations may be destructive to tourism. Tourism is linked with relax, safety is thus a basic requirement.
- The Schengen area enables free movement of the EU citizens, which is a fundamental pillar of the development and growth in the tourism sector in Europe.
- Travel safety, especially in air transport, also depends on future political, health and security approaches of both destination and transit states.
- The possibility of tax refunds on products purchased during a stay in a foreign country may be a motivation to visit the country.

Period during the COVID-19 crisis:

- Unlike the previous crises, this crisis is influenced by political decisions of regional governments, such as restrictions on the mobility of population within and between countries (air transport, etc).
- The Schengen area in the EU is paralysed, checks at internal borders have been restored, or borders have been even partially closed to tourists.
- Missing effective coordination of individual EU member countries.
- Extraordinary restrictions in travelling for the unvaccinated - partially applied in the EU members.

3.2.2 Economic Factors

Period before the COVID-19:

- Growth in disposable income has a direct impact on growth in the tourism sector.
- The sharing economy trend is changing the way people travel. Individuals exchange products and services directly (the best known include Uber - a new way of transport; Airbnb - a low-cost alternative to traditional accommodation, etc.). An increase in the use of these services has a negative impact on several traditional companies operating in this sector.
- E-commerce is contributing to the reduction of prices of goods and services in tourism (shortening of the distribution chain, preference of direct distribution channels to customers).

Period during the COVID-19 crisis:

- The economic crisis has resulted also in the growth of unemployment growth, reduction of disposable income, or lower consumption, which has led to lower demand for tourism.
- Tourism enterprises have existential problems due to insufficient funds (reduced offer).
- Enormous public expenditure related COVID-19 will lead to reductions of public investment in the tourism sector or associated sectors (culture, sport, infrastructure, etc.) in the future.
- Alternative competition becomes secondary (unable to guarantee hygiene and safety standards).
- Companies providing transport serviceability of an area in line with the public interest reduce their offer, the level of economic losses and risks is increasing.

- conditions and the amount of state support of tourism enterprises differ across the EU countries.

3.2.3 Social Factors

Period before COVID-19:

- The global nature of society determines long-distance mobility, breaks down cultural and language barriers, and facilitates communication and interaction of individuals and society.
- The unification of tourism services has become secondary, everything that is local, unique and traditional is becoming popular; being aware of national/regional identity and genius loci represents an effort to maintain the unique character of society in the globalised world.
- The global ageing of the population due to the increasing average age and decreasing birth rate are changing product structure (share of product portfolio intended for the elderly is growing).
- Social networks enhance an increase in travel. Individual users present themselves by travelling as an aspect of self-fulfilment, as a fashion trend, meaningful leisure time activity, etc. Social networks for marketing communication are becoming more commonly used.

Period of the COVID-19 crisis:

- Social distancing and the issues of social responsibility are prioritized, with the aim to prevent the spread of the virus (extensive use of various digital communication platforms).
- Mass tourism is restricted to the lowest possible extent, and efforts of creating smaller groups of participants in shaping the offer of tourism products and services have been highlighted.
- Preference of local or regional tourism over international tourism (maximum cross-border tourism in the case of a favourable epidemiological situation).
- Travelling significantly reduced in the segment of the elderly, as the most vulnerable group.

3.2.4 Legal factors

Period before COVID-19:

- Gradual changes in legislation enable employees to use flexible working hours or work from home, which means they can work from virtually anywhere (internet connection). Especially younger population often associates this trend with travelling (digital nomads).
- Work for international companies is often done outside a country, employees are typically sent on business trips, and career-related education; the MICE tourism is constantly growing.
- Tax legislation in a given country can have a positive impact on tourism in the event of a significant intervention in consumption tax and VAT, which in turn is reflected in the pricing of tourism products and consequently in the international competitiveness of a sector.

Period of the COVID-19 crisis:

- Flexibility at work or in the workplace becomes a new standard, not a benefit.

- Legislative review of the existing legislation on the movement of inhabitants of a given country, region or locality at the time of an increased morbidity.
- Legislative review of the existing legislation concerning closing/opening individual tourism facilities, or reduced opening hours (e.g. hotels, restaurants, wellness facilities, spa, fitness, etc.) at the time of an increased morbidity.
- Changes in other legislation depending on current pandemic situation.

3.2.5 Legal Factors

Period before COVID-19:

- Efforts to integrate environmental sustainability in the tourism sector. The greatest polluters of the environment include mass tourism, air and car transport.
- Promotion of the so-called slow tourism using ecological modes of transport (shared transport, walking, bicycle), local ingredients in gastronomy (ingredients from a given region, up to a maximum distance of 100 km), private accommodation.
- Tourism is reaching the level of self-realization, e.g. environmental volunteering is linked with learning and travelling, area revitalization with active recreation, etc.

Period of the COVID-19 crisis:

- Increase in demand for environmentally minded/conscious products puts pressure on the supply of tourism products.
- Restrictions in public transport and mass tourism reduce the environmental burden.
- Preference for destinations that meet the increased requirements for safety and hygiene.
- Social responsibility of tourism enterprises at the time of pandemics is part of the sustainable development of companies and an instrument for building brand reputation.
- Even more intensive need for human contact with the natural environment: urban environment vs. rural environment; noisy environment vs. quiet places and without light pollution, information overload from IT vs. absence of mobile / data transmission, etc.

4. Discussion

The observed trend of reducing the use of public transport and increased use of cars, bicycles and walking has been confirmed in studies conducted in other countries (within the EU) [36-39]. This trend is related to working from home but mainly to the fear of virus transmission. Tourism is perceived as a vulnerable sector, with many external factors affecting its performance. On the other hand, the experience of the last decade indicates that after unpredictable events, demand for tourism services and tourism enterprises recover very quickly. There are also reasonable opinions, mainly of health care institutions that pandemics of this kind will be more frequent in the future. According to

[26] companies will need to improve the resilience of their products at the times of pandemic, and their flexibility to adapt their offer to possible changes, which will be reflected in consumer behavior. Social impacts on tourist areas, especially the attitudes of given destinations´ residents to incoming tourists, are thus questionable. Their opposition could disrupt the existing structures and relations, which are essential to services. The creation of content on social media is also affected by tourism management organizations, which can shape the social climate.

Studies focusing on the environmental aspects of the tourism sector agree that the pre-crisis period represents the times when mass tourism caused enormous damage to the environment, and its continuous growth was unsustainable. Even if the COVID-19 crisis were to end soon, a return to previous level of tourism activities would generate massive environmental damage. In other words, remaining at the previous level is unsustainable. Future trends will include eco-friendly products and services as well as destinations. Such services and products have a potential to generate high added value. Another trend very likely in the short and medium term (already noticeable in practice in our area) is promoting domestic tourism and shorter-distance travel [28]. This form of tourism is close to the concept of the so-called slow tourism (see e.g. [29]). On the one hand, tourism leads to demand satisfaction; on the other hand, it can work even with mobility restricted at the international level. Its ecological aspect and sustainability cannot be ignored. Empirical experience shows that the most competitive tourist destinations are those with a more broadly diversified product offer. The length and the intensity of the pandemic still cannot be predicted. Therefore, an estimate of its consequences is almost impossible. It can be observed that individual macro-economic factors of the PESTLE analysis point to confirmation of already started trends, and their unusually fast and extended absorption, e.g. massive use of IT technology in almost all areas, individual travel, so-called “return of people to the nature” in tourism products, which is also related to the demand for sustainable products and services, etc. However, in some cases, differences can be seen between the expected trends in tourism, which used to be considered generally valid prior to the COVID 19 pandemic, and those expected at the time of the pandemic or shortly after it, e.g. travelling to distant destinations, is not natural to tourists anymore, but especially notable changes in the area of social factors, which are generated by significantly restricted mobility and socialization of people, have been recorded. The outcomes of analyses and forecasts differ. The prevailing opinion is that after so extensive global crisis nothing will ever be as it was before the crisis, that the old structures will change, and a so-called great reset will take place. Some studies expect a fast return to normality, or to a situation similar to that prior to the crisis [23,27,32]. Accordingly, it would represent the fulfillment of the black swan theory - as soon as an unexpected event with a great socio-economic impact end, rationalization follows. This scenario would not result in significant changes in the sector from the perspective of its future management and planning [40,41]. Studies focused on the

environmental aspects of the tourism sector agree that the pre-crisis period represents times when mass tourism was causing enormous damage to the environment, and its continuous growth was unsustainable. Even if the COVID-19 crisis ended soon, returning to the previous level of tourism activities would generate massive damage to the environment. In other words, remaining at the previous level is unsustainable. Trends will include ecologically oriented products and services as well as destinations. Such services and products have the potential to create a high added value. Another trend that will be very likely fulfilled already in the short-term and medium-term horizons (it is even already reflected in practice in our area) is strengthened domestic tourism and shorter-distance travel. This form of tourism approaches the concept of so-called slow tourism. On the one hand, tourism leads to demand satisfaction, on the other hand, it can also function under mobility restrictions at the international level. Its contribution to the environmental aspect and sustainability cannot be omitted.

5. Conclusion

The paper aimed at depicting the current macro-economic trends that affect the tourism sector, thus contributing to the creation of an input basis for the discussion on a possible orientation of the sector and enterprises and creation of services and products in Europe. It should be stated that with regard to the results of the PESTLE analysis, not all factors can be clearly classified as economic, political, legal, etc. Their comprehensive character and interconnection with economy, politics or ecology often obscure the dividing line between them. The ever-changing situation concerning COVID-19 in the world and in individual tourism regions represent a significant limitation, as they require flexible and creative responses, especially in the light of the current scientific findings and knowledge. This paper aimed at summarizing the current macro-economic factors that have a significant impact on the tourism sector. The authors based their work substantially on collecting secondary information and data currently available in literature, and on published empirical studies. It can be stated that this summary is not final; with regard to the sector adaptation to the so-called “post-Covid” era, its continuous updating will be necessary. The specified trends, which can be useful as inputs in the development of a tourism offer (companies, municipalities, regions, governments, etc.) cannot be applied generally and uniformly; the current situation on the tourism market and the unique character of preconditions for the development of tourism at a given territory are essential.

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