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Tourist Accommodation Establishments during the Pandemic – Consequences and Aid Report on a Survey among Polish Micro-enterprises Offering Accommodation Services

ABSTRACT

Objective: The key objective of the article was to seek the answer to the question how the limitations of the first COVID-19-related lockdown affected small businesses offering accommodation services and how the businesses fared during the unlocking period. The side objective of the paper was to identify the actions undertaken in said businesses aimed at providing safety for the guests as well as to show the expectations such businesses had when it came to government aid.

Methodology: In order to meet the objectives and to verify the working hypothesis, empirical research using the diagnostic survey method was conducted at the end of 2020. The article provides the results of the pilot survey carried out on a selected group of microbusinesses providing accommodation services. The link to the questionnaire was sent to 1000 entities, of which 47 completed it correctly.

Findings: The tourist industry is among those affected most by the COVID-10 pandemic. The research revealed that during the first lockdown, the closure of accommodation businesses had a relatively strong impact on the subjects of the research. The situation remained similar during the first months of lifting of the restrictions. The summer brought a slight recovery albeit not as big as was expected. Nevertheless, strong premises were found which supported the hypothesis saying that such subjects – due to their size-dependent nature – fared relatively well in all three sub-periods. For the most part, such entities re-started their operations in spring. In many of them, the level of employment remained unchanged despite the significant drop in their incomes – mainly resulting from a lower number of foreign visitors and - to a lesser extent – from lower prices. The struggle for customers forced the subjects to introduce various solutions aimed at providing safety, which proved a considerable financial and organisational burden.

Value added: The research is one of the first attempts in Poland to measure the impact of lockdown on the functioning of accommodation businesses and one of the few focusing on microbusinesses. The findings show to what extent the lockdown affected the operations of the entities in question, how the lifting of restrictions changed the situation in the summer, and what actions were taken to minimize the risk of infection.

Recommendations: The findings show that the analysed entities are able to function in sanitary regime and that they support solutions which will allow them to offer their services in as safe a way as possible. On the other hand, they expect strong support from the state including subsidies or exemptions. It is to be expected that the need for this form of aid will grow even stronger after further lockdowns.

Key words: tourism, pandemic, accommodation services

JEL codes: M10, M30, Z32

Impact of Epidemics on Tourism

Tourism industry is a sector much vulnerable to a number of factors, including the ones having definitely negative impact. Based on the previous experiences following different types of crisis, also the ones that occurred in the 21st century, changes in the consumer behaviour may be observed, such as refraining by some tourists from travelling, which is driven by their fear of possible threats. As it was pointed, fear sources may be diverse. For instance, they may be linked to war, political situation, terrorism, climate conditions or a risk of being afflicted with a disease, and the tourist demand strongly depends on different types of disasters and crises (Cro & Martins, 2017). To name only a few examples one should think of the annexation of Crimea by the Russian Federation (Ivanov, Idzhylova, & Webster, 2016) or 11/9 terrorist attacks (Blade & Sinclair, 2003; Hall, 2002).

It is suggested that financial crises and security-related crises affecting tourism industry are man-made crises most often analysed in the literature (Li, Wen, & Ying, 2018). Particularly terrorist attacks that are immediately reported in media have strong and quick impact on tourism industry (Hajibaba, Boztug, & Dolnicar, 2016, p. 49).

The risk of being afflicted with a disease is an important factor affecting tourism demand, still it is more frequently associated with the developing countries, rather than the developed ones (Jonas, Mansfeld, Paz, & Potasman, 2010). Professional literature analyses how the risk of different diseases, like borreliosis, affects the tourism industry (Donohoe, Pennington-Gray, & Omodior, 2015). Research place great emphasis on virus threats and epidemics they cause. The impact of pandemics like SARS (Cooper, 2005; Rittichainuwat & Chakraborty, 2008; Breda, 2004; Henderson & Hallinh, 2007), influenza A/H1N1 (Rassy & Smith, 2013; Solarin, 2015), or Avian Flu (Page et al., 2006) has been broadly discussed in the literature. However, one should bear in mind that also other diseases, even if they do not affect the human health and life directly, have also strong impact on the tourism sector. As the English Tourism Council assessed, Foot and Mouth Disease could result in economic losses estimated at £5 billion in 2001 (Miller & Ritchie, 2003).

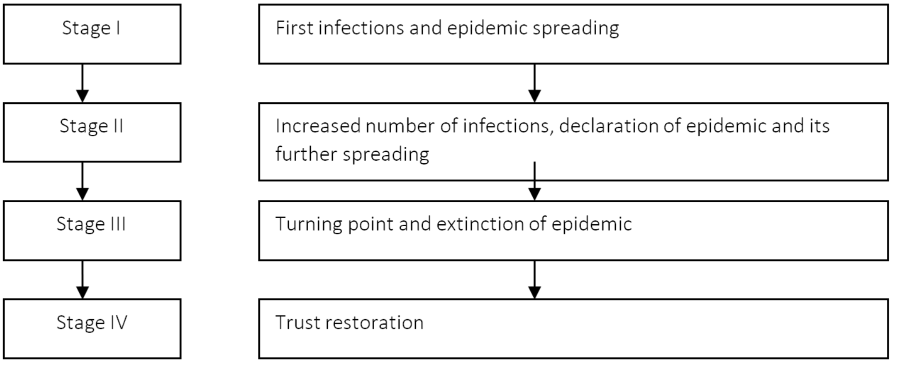
Both epidemic, as well as different diseases described in the tourism context are analysed taking into consideration different aspects of this issue. Analysis of protective behaviour is one of the aspects examined in research on health risk related with travelling (Chien, Sharifpour, Ritchie, & Watson, 2017). Sensations seeking, defined as "need for varied, novel and complex sensations and experiences and the willingness to take physical and social risks for the sake of such experience" is another issue connected with the tourists' attitude towards threat (Zuckerman, 1979, p. 10, as cited in Lepp & Gibson, 2008, p. 741). It seems that tourists seeking "experience" are more willing to take risk while travelling to destinations known for social unrest or the risk of being afflicted with an infectious disease. According to research carried out so far young people are more ready to run the risk, even the one connected with epidemic (Aro et al., 2009).

Analysis of the epidemic impact on the tourist industry seems to be particularly often and profoundly examined research area. As it has been pointed, researchers usually analyse the impact of a crisis (like pandemic) on particular destination (Teitler-Regev, Shahrabani, & Goziker, 2013, p. 85). It remains indisputable that epidemics and all threats related with them result in the reduction of tourism demand in destinations where a given infectious disease is present. However, the scale of shift in demand as well as the consequences suffered by a given destination, or by other areas in case of demand relocation, leaves the question open.

According to research carried out in 2015, 25% of international tourists changed their holiday plans due to safety concerns or health conditions present in destinations they were to visit (Nicula & Onetiu, 2016, p. 196). However, these are not diseases that constitute the main reason for cancelling departures. In one of the surveys only 31% of respondents provided that reason, whereas 83% feared terrorist attack and 49% were afraid of armed conflicts (Nicula & Onetiu, 2016, p. 196). On the other hand, there are also opinions that the impact of SARS epidemic in East Asia on tourism industry was four times or even five times greater than 11/9 attacks in the USA (Au, Ramasamy, & Yeung, 2005, pp. 86–87).

Economic costs of epidemic, borne also by the tourism industry, are incredibly high (Sułkowski, 2020). The costs of bird flu pandemic were estimated at 3.1% of the global GDP in 2007 (Tew, Lu, Tolomiczenko, & Gellatly, 2008, p. 338). The International Labour Organization estimated that due to SARS epidemic in China and Hong Kong and the resulting decrease in travels, 5 million jobs could have been lost worldwide in 2003. The World Travel and Tourism Council estimated that that year China would lose 2.8 million jobs, still this figure is likely to be much higher if indirect impact is taken into consideration. Financial loss was estimated at 20.4 billion in the China GDP (Breda, 2004). It was estimated, that in percentage terms, private travels in China in 2003 decreased by 14%, travel and tourism industry employment fell by 20%, and the decrease in travel and tourism industry GDP reached over 20% (WTTC, 2003). Between December 2002 and June 2003, the number of tourist travels to Hong Kong was 4 times lower (Au, Ramasamy, & Yeung, 2005, p. 86). SARS infections, also the ones which ended with patient's death, were also reported in Canada. To name an example, in Toronto itself the loss suffered by the tourist industry from 6 April to 1 June 2003 was estimated at 180 million dollars, whereas between 2 March and mid-July the figure exceeded 340 million, resulting in over 12 thousand jobs lost, mainly in the accommodation (Tew, Lu, Tolomiczenko, & Gellatly, 2008, pp. 334–335). It is worth mentioning that the decreased number of tourists is directly reflected in the loss suffered by the hotel, restaurant, transport, entertainment or souvenir sectors, and due to multiplier, it indirectly affects other cooperating sectors and further branches (Marjański & Sułkowski, 2021).

Figure 1. Stages of epidemic vs tourism



Source: own compilation.

Figure 1 presents 4 stages of epidemic and its impact on tourist destinations. Special attention should be paid to the last stage, as this is the time when tourist managers can exert the strongest influence on creating tourism demand, and thanks to proper initiatives loss caused by epidemic is likely to be minimised. This is the reason why even at the present stage of Coronavirus pandemic it is advisable to examine tourist plans in a medium to long-term perspective.

1) Stage I – first infections and epidemic spreading – initial stage during which number of infections increases and first news is reported in media, but at the same time the impact on tourist travels is relatively low, however with some decline in bookings and planned arrivals.
2) Stage II – increased number of infections, declaration of epidemic and its further spreading – news on epidemic is broadcast in headlines, there is a growing concern among tourists, planned arrivals are cancelled.
3) Stage III – turning point and extinction of epidemic – the number of infections decline, but the travel concerns continue to exist, tourist sector still suffer heavy loss, media news on epidemic situation in a given state becomes relatively less frequent.

4) Stage IV – trust restoration – post-epidemic period, when trust to particular destinations needs to be rebuilt, media lose interest in the epidemic despite great potential in supporting recovery of tourism.

Other authors point that this stage and its characteristics are relatively rarely analysed (Mao, Ding, & Lee, 2010). As mentioned above, outbreak of epidemic causes arrival cancellations in a given destination, and the epidemic-related concerns are likely to continue long after its termination. Initiatives aimed at recovery of tourist demand and preventing the customers from cancellation of their bookings are of great importance both in the situation presented above and other types of crises (Hajibaba, Boztug, & Dolnicar, 2016, p. 49). In the case of Covid-19 pandemic due to worldwide problems the situation will be certainly special.

The significant role of media (Walters, Mair, & Lim, 2016) in the process of tourist demand shift due to risk of being afflicted with a disease is worth emphasizing. It is possible that certain number of infections will not grow to epidemic, but still the topic will excite media interest and arouse travel concerns. Specialists point out that the media are able to create inaccurate impression that travelling to certain destination entails a risk (Valencia & Crouch, 2008, p. 25). In such a situation, despite little actual threat, the tourism sector may suffer a heavy loss. Emphasis is put on the fact that there is a positive correlation between being aware of a risk and willingness to run it (Wang & Wang, 2018), and this is the media that to a great extent bear responsibility for creating news in which travel-related risk awareness is raised.

Moreover, an image created by the media may be long-standing (Beirman, 2003, as cited in Valencia & Crouch, 2008, p. 25), which is why Stage IV aimed at restoration of trust to a given destination is so important. In the case of SARS, it was pointed out that tourism sector suffered consequences of the epidemic even 5 years after (Tew, Lu, Tolomiczenko, & Gellatly, 2008).

Obviously, also COVID-19 pandemic is a subject of numerous analyses, including the ones concerning tourism industry. Firstly, it needs to be emphasized that its range and impact is incomparable with the epidemics discussed above. Secondly, the epidemic is ongoing. It seems that according to the scheme presented in figure 1, many regions in the world, like Israel, are about to enter Stage III, which is greatly thanks to mass vaccination. On the other hand, due to dynamics observed during the pandemic and new virus variants discovered by the scientists, extinction of the pandemic remains uncertain.

The whole world suffers the pandemic negative consequences. Closed borders, transport restrictions, limited functioning of hotels and closed entertainment venues due to COVID-19 outbreak have resulted in crisis suffered by the tourism industry, which is estimated to be even ten times higher than the 2009 crisis. Data presented by the UNWTO alone concerning international tourism industry shows heavy loss. The number of international travels between January and October 2020 declined by 72% as compared to the same period in 2019, with the loss amounting to 935 billion dollars. Mass vaccination gives some prospects for the tourism industry to recover, however, as UNWTO estimates, to achieve the 2019 level we must wait between 2 and 4 years (Wolska, 2020).

Restrictions in the movement of persons and limited activity of the hotels resulted in the sharp decline in the number of individuals using tourist accommodation establishments also in Poland. During lockdown in April 2020 there was almost no tourist activity and the number of tourists in accommodation establishments was 28 times lower as compared to the previous year. The situation was improving in the following months, but during the summer holiday there were 30% fewer tourists than one year earlier (Krzyżaniak, 2020). As compared to 2019, in 2020 the number of tourists using tourist accommodation establishments declined by 49.9%. In 2020, only 26.8% of overnight accommodation in all tourist accommodation establishments was occupied, which means a decline by 13.8% as compared to the previous year. Decreased number of tourists visiting accommodation establishments was reported in all Polish provinces, with the lowest decline in West Pomerania Province (by 34.4%) and Warmia-Masuria Province (by 36.6%), and the highest decline in Mazovia Province (by 61.8%). According to data presented by the

Statistics Poland (GUS, 2021), in terms of using overnight accommodation the highest figures were reported during summer holiday in July (38.3%) and August (44.5%), but as compared to the similar period in 2019, the figures declined by 13.5% and 8.7% respectively (GUS, 2021).

Beyond doubt it is still too early to assess pandemic impact on the tourism industry in a complex way. Nevertheless, efforts aimed at doing some forecasts are being made (Bouarar, Mouloudj, & Mouloudj, 2020; Khan & Hashim, 2020). The current situation is also being compared with the previous epidemics; however much emphasis is given to the uniqueness of the present crisis (Gössling & Scott, 2021). It is clear today that the actual pandemic impact is different/stronger than it was initially assumed (Foo, Chin, Tan, & Phuah, 2020).

Despite the fact that the pandemic is still ongoing, there are some efforts to develop possible crisis recovery scenarios – either based on econometric models or relying on a panel of experts (e.g., Delphi method). However, stress is put of the fact, that both limited access to data and unpredictability of pandemic development restrain possible reasoning (Zhang, Song, Wen, & Liu, 2021).

There is also no element of surprise that some research is dedicated to particular segments of the tourist industry, like the ones related with the transport services, overnight accommodation or operation of the travel agencies (Ghazali & Ishak, 2021). The following study focuses on the operation of small- and micro-enterprises offering overnight accommodation services.

Research aims and methodology

Tourist industry is characterised by strong diversity and is made of different entities. Establishments offering accommodation services make the key group and taking this group into consideration micro-enterprises are of special interest. The entities in question manage small establishments, which in the pandemic perspective should constitute an asset and be considered as competitive advantage, as the social distancing requirement is more likely to be observed there. According to data presented in the Statistical Yearbook of the Republic of Poland, in 2019 there were 11251 tourist accommodation establishments in Poland, out of which 2635 constituted hotels and 1064 other hotel facilities. Boarding houses, motels and "other facilities" i.e., the research potential addressee, constituted the remaining 70% (Statistical… 2020, p. 409).

The major aim of the research was to determine how pandemic-related restrictions introduced during the first lockdown affected small facilities and how these establishments cope during the economy unfreezing. Research hypothesis was therefore as follows: micro-entrepreneurship offering overnight accommodation services, due to their sizes, did relatively well while coping with the COVID-19 restrictions introduced in Poland in 2020, both during the lockdown, as well as spring and summer economy unfreezing. Another aim of the research was to identify actions undertaken by these establishment in order to guarantee the tourists safety. The research also aimed at uncovering respondents' expectations in terms of aid to be provided to micro- and small-enterprises offering overnight accommodation services.

47 accommodation establishments participated in the research. Rooms for rent (29.8%), agrotourism lodgings (27.7%) and boarding houses (12.8%) made the greatest share of respondents. Apart from the above-mentioned facilities, the research covered also other types of facilities, i.e., complexes of tourist cottages, villas, and excursion hotels. Most establishments were located in the mountains (78.7%) and at the seaside (10.6%). Out of all establishments 91.5% operated all year round. Family-owned enterprises constituted 80.9%.

The research was conducted in November and December 2020. Participation invitation letters were sent via e-mail to 1000 establishments; moreover, 150 phone calls to the prospective respondents were made to strengthen the request. 47 establishments responded positively, which make only 5% of all entities to which the survey link had been sent. Of course, this cannot be considered as satisfactory, and therefore results gathered must be considered as the first stage of the ongoing research aimed at assessing pandemic impact on small-sized tourist enterprises in Poland. On the other hand, that situation was partly explicated during the phone calls. Large number of establishments were run by elderly persons who were often unable to use e-mail correspondence. Moreover, due to situation caused by the lockdown many owners were not interested in taking part in the survey.

Results

In the first part of the questionnaire, respondents were asked to assess the establishment's standing at the outset of the pandemic. That period was divided into 3 sub-periods: lockdown and far-reaching restrictions affecting the tourism sector – March–April; lifting the restrictions – May–June; summer holiday – July–September 2020.

During the research respondents were asked to specify the date of re-opening the establishment following the economy unfreezing in the spring 2020. Slow re-opening started in April (that month only 4.2% of establishments re-opened – 2 respondents). Most of the respondents indicated June (40.4% – 19 respondents), and a little fewer May (31.9% – 15 respondents). Another 19.1% of the surveyed establishments re-opened in July (9 entities). 2.1% of the respondents (1 establishment) was closed even during the whole summer holiday.

The aim of the research was to determine what kind of changes the establishments experienced and to what extent (discretionary opinion – expressed in % as compared to the previous year) COVID-19 (during spring 2020 lockdown, from the moment of lifting restrictions to June and during the summer holiday) affected: employment, employees remuneration, occupancy level in the establishment, share of foreign tourists, duration of the tourists stay, sales revenues, room rates, maintenance costs resulting from an obligation to observe sanitary requirements. Results are presented in tables 1-3.

Table 1. Changes experienced by the accommodation establishments during lock-down as compared to the previous year

	decline (in %)				increase (in %)				no changes	not applicable (own workforce is used)
	1–29	30–59	60–99	100	1–29	30–59	60–99	100		
employment	2	4	3	4	0	0	0	0	23	11
employees remuneration	7	2	5	4	2	1	0	0	16	10
revenues on service sales	5	12	13	13	3	0	0	0	1	0
establishment maintenance costs	8	6	4	0	9	5	1	2	12	0

Source: own compilation based on questionnaire survey.

According to table 1, during the lockdown almost 50% of establishments did not change employment level. Individual establishments downsized employment (in different percentage share), including 4 cases (8.5%), where downsizing reached 100%. Increased employment was not reported in that period. In terms of remuneration, conditions were almost the same – large group of establishments – 34% – did not change it, but some establishments lowered employees' remuneration in different percentage share. During lockdown, 91% of establishments reported lower revenues on service sales. In percentage terms the said decrease significantly differed. Decline in the revenues on service sales reaching 1–29% was reported by the fewest number of establishments. The remaining ranges (concerning decline in revenues) was reported by similar number of establishments (12–13 respondents). In terms of maintenance costs during the lockdown, 38% of accommodation establishments reported decline indicating different percentage ranges, whereas for 36% of them maintenance costs were higher. Quite a large number of establishments claimed there were no changes in the maintenance costs – 25.5% of respondents.

Table 2. Changes experienced by the accommodation establishments from the moment of lifting restrictions to June (number of establishments) as compared to 2019

	decline (in %)				increase (in %)				no changes	not applicable (own workforce is used)
	1–29	30–59	60–99	100	1–29	30–59	60–99	100		
employment	2	4	3	2	2	0	1	0	23	10
employees remuneration	5	3	3	2	4	1	0	0	19	10
occupancy level	4	18	15	5	3	1	0	0	1	0
revenues on service sales	4	14	17	6	5	0	0	0	1	0
room rates	14	4	3	1	2	0	0	0	21	2
duration of guests stay	11	13	7	2	1	0	0	0	11	2
share of foreign guests	6	2	7	20	0	0	1	0	9	2
establishment maintenance costs	8	0	2	0	18	2	1	2	14	0

Source: own compilation based on questionnaire survey.

Table 2 shows that during the following period – from the moment of lifting restrictions to June – in the same number of establishments (almost 50% of respondents) employment level was not changed, similarly to the previous period. As previously, downsizing was present in individual establishments with different percentage share, and only in 2 establishments decline reached 100%. Also, during this period similar percentage share of respondents reported no changes in the remuneration (40% of establishments). A number of establishments reported lower remuneration in different percentage ranges. During the second period, 87% of establishments also reported lower revenues on service sales. However, as compared to the previous period, a larger number of establishments (49% respondents) reported increased maintenance costs, which means that situation was experienced by additional 6 establishments (13%).

With respect to establishments re-opening, respondents informed about changes in room rates, duration of guests stay and the share of foreign guests. Results of the survey show that in 44.6% establishments room rates remained unchanged. Large number of entities (29.7%) reported decline in room rates ranging 1–29%. Unfortunately, during that period 70.2% of establishments informed that the duration of guests stay was shorter.

What is quite characteristic for that period (still foreseeable) is that 74.4% of respondents reported significant decline in the number of foreign guests, including 42.5% establishments where the said decline reached 100%. Declined occupancy level was observed in the majority of establishments (89.4%), ranging 30–59% (18 respondents) and 60–99% (15 respondents).

Table 3. Changes experienced by the accommodation establishments during the summer holiday (July–September) as compared to 2019

	decline (in %)				**increase (in %)**				**no changes**	**not applicable (own workforce is used)**
	1–29	30–59	60–99	100	1–29	30–59	60–99	100		
employment	2	3	3	1	1	2	0	0	25	10
employees remuneration	3	1	4	1	5	1	1	0	21	10
occupancy level	5	15	9	1	7	3	2	0	5	0
revenues on service sales	7	12	8	2	10	4	0	0	4	0
room rates	9	5	2	1	5	0	0	0	24	1
share of foreign guests	6	2	8	19	0	1	0	0	9	2
establishment maintenance costs	4	2	3	0	17	6	0	2	13	0

Source: own compilation based on questionnaire survey.

Table 3 presents changes observed in the overnight accommodation establishments during the summer holiday. As it comes to employment level, the changes were insignificant. Downsizing was reported by slightly smaller number of establishments than during the previous period. Similarly to employment level, also decline in remuneration was reported by fewer establishments. That was an expected result, as firstly, during the holiday tourist demand was definitely higher, and secondly decline in both aspects was reported during both previous periods. During the summer holiday some establishments (25.5%) reported increased occupancy level. Decline in occupancy was reported by 30 establishments – 63.8%, whereas in the previous period it was observed even in 42 establishments (89.4%). Taking into consideration the analysed and previous periods, there was a significant change in the number of establishments which reported decline in revenues on service sales – this figure decreased by 12 establishments (from 41 establishments in the previous period to 29 establishments in the analysed period). During the summer holiday, 29.7% of establishments reported increase in revenues, whereas until June that share was only 10.6%. Similarly to the previous period, room rates were usually not changed in the majority of establishments (51% respondents) or were decreased in different % range (decrease ranging 1–29% was reported by the largest number of establishments). The share of foreign guests remained almost unchanged as compared to the previous period. Decline reaching 100% was observed in 19 establishments. As it comes to establishment maintenance costs, the situation was almost similar both in the analysed and previous periods. A pretty large number of the surveyed establishments reported increased costs during the summer holiday (17 respondents – 36.2%), whereas for others the costs remained unchanged (13 respondents – 27.6%).

During the survey, the respondents were asked to name actions they undertook, as well as rules and procedures they implemented in order to prevent negative consequences of Coronavirus pandemic and to guarantee the tourists safety (survey results are presented in table 4). When certain solutions were introduced, the respondents were asked to determine organisational efforts and financial burdens related therewith ranging 1–3, where 1 – minor, 2 – medium, 3 – considerable. Where no solutions were implemented, the effort was ranked 0. "Not applicable" (N/A) response was possible, if a given facility did not render certain type of services or if it did not possess equipment referred to in the question.

Table 4. Actions undertaken, rules and procedures implemented to prevent negative consequences of Coronavirus, as well as organisational efforts and financial burdens related therewith

Actions/rules/procedures	**3**	**2**	**1**	**0**	**N/A**
determining and controlling maximum number of guests based on the number of rooms	16	10	9	4	8
introduction of 1-week stay requirement	9	0	4	18	16
no booking of rooms in the establishment, only self-contained residential premises or cottages available for booking	5	1	1	12	28
introduction of no-cash payments	8	1	10	17	11
separation of safe zones outside the establishment for each accommodated family	12	2	5	13	15
common areas like gyms, playgrounds, recreational facilities were closed for guests	14	6	4	7	16
no extra offers like: excursions, equipment rent, barbecue, educational activities, or health activities	17	2	2	8	18
organisational changes including pathways, increased number of entrances and exits	9	2	2	12	22
minimum number of guests at the reception desk and limited time spent within the check-in area	10	9	5	5	18
disinfecting equipment available for guests after each use	27	6	1	3	10

increased frequency of disinfecting common toilets	25	3	2	5	12
placing instructions and recommendations concerning health safety improvements in relevant places	22	8	9	5	3
implementation of a special procedure to be followed in case of suspected infection	18	4	9	9	7
introduction of special rules to be observed in the establishment and using relevant tools to communicate them	17	7	6	9	8
possible purchase of personal protection equipment/masks in the reception desk	11	5	3	14	14
offering masks	11	4	4	14	14
offering disinfectants in common areas	29	3	8	2	5
room cleaning procedure with additional disinfection of frequently touched surfaces	32	5	7	1	2
regular disinfection of frequently touched surfaces in common areas	33	2	4	2	6
not accommodated individuals were absolutely banned from staying in the establishment	25	6	7	4	5
temperature measurement at check-in	8	4	5	15	15
obligation to fill in a health statement by the guests	7	1	9	19	11
Other, please specify...	2	2	3	11	29

Source: own compilation based on questionnaire survey.

Numerous establishments introduced different solutions aimed at guaranteeing tourists' safety. Large number of entities claimed that implementation of those measure entailed much effort. According to data presented in the table, for over 50% of surveyed establishments organisational and financial efforts were most burdensome in areas such as: disinfecting equipment available for guests after each use, increased frequency of disinfecting common toilets, making disinfectants available in common areas, room cleaning procedure with additional disinfection of frequently touched surfaces, regular disinfection of frequently touched surfaces in common areas, introducing absolute ban for not accommodated individuals on staying in the establishment. Some solutions were not implemented in a large number of establishments. Those included: obligation to fill in a health statement by the guests, introduction of 1-week stay requirement, introduction of no-cash payments, possible purchase of personal protection equipment/masks in the reception desk, offering masks, temperature measurement at check-in.

To withstand competition and attract customers in the harsh times of pandemic, the following actions were undertaken by the establishments:

a) full return of advance payment without stating the reason – 31.9% of establishments;

b) attractive rates – 27.7% of establishments;

c) guests were encouraged to contact the establishment via e-mail – 8.5% of establishments;

d) vouchers to be used at any future time were offered instead of booking cancellation – 10.6% of establishments;

e) vouchers encouraging visit in the establishment at any future time – 14.9% of establishments;

f) interior disinfection, room ozonation – 2.1% of establishments.

The respondents specified an option chosen by the guests, who had earlier made booking, due to establishments closing. In case of 57.4% of establishments the booking was cancelled/agreement was terminated, whereas in case of 40.4% respondents the booking was postponed.

Asked about actions and initiatives which should be implemented in the future to guarantee guests safety, respondents primarily opted for: proper marketing communication concerning safety (46.8% of surveyed establishments), tourist health passports (21.3%) and safety certificates granted to establishments (19.1%). Other suggestions were presented occasionally.

Respondents expected the following forms of state aid:

- financial aid, assistance dependent of the revenues earned in the preceding years;
- decrease in fixed costs;
- hotels and restaurants re-opening in sanitary regime around summer holiday 2020;
- remission of real estate tax, waste management fees and other financial obligations when a given symbol in the Classification of Business Activities [Polish PKD] is required to close;
- exemption from Social Security [ZUS] and Agricultural Social Insurance Fund [KRUS] payments as well as downtime pays for employees;
- compensation of 75% of revenues;
- resignation from closing rent-related establishments, or alternatively limiting the number of rented rooms e.g., to 50%;
- separate residential premises/cottages should be available for single families, with limiting a residential premises/cottage per one family and with board provided with the observance of sanitary regime;
- re-opening of hotel industry;
- including all entities, also agrotourism establishments, in the financial shield,
- non-returnable loans and grants;
- minimum financial aid of PLN 6000–10000 a month;
- proving free Coronavirus tests for hotel owners;
- payment of 75% of income after taxation earned in 2019;
- grants aimed at extending offer, in particular recreational offer;
- compensation of lost revenues (calculated against similar period in previous year) of at least 60%.

Summary

Assumed research hypothesis was confirmed: micro-entrepreneurship offering overnight accommodation services, due to their sizes, did relatively well while coping with the COVID-19 restrictions introduced in Poland in 2020, both during the lockdown, as well as spring and summer economy unfreezing. Most of the surveyed accommodation establishments coped with lockdown restrictions and re-opened in the spring. Both during lockdown and between May and June, in the large number of establishments employment level and employees' remuneration remained unchanged, although some entities reported the decline. Massive downsizing or establishments liquidations were not observed, though. Decline in revenues on service sales was the most visible pandemic impact in the majority of establishments. That was caused by shorter stay of guests, lower occupancy level, and in particular, sharp decrease in the share of foreign guests. Despite lower revenues, to attract customers establishments were undertaking different types of actions aimed at guaranteeing tourists' safety, which entailed considerable organisational effort and financial burden. That could result in increased maintenance costs and room rates. However, according to research results, changes in the maintenance costs were much diverse, in some establishments they increased (usually the increase was greater following lockdown), in the others declined or were the same, but room rates remained unchanged or even declined. Attractive rates were one of the tools to withstand competition and attract tourists. In terms of employment level and remuneration, situation of the micro-establishments slightly improved during the summer holiday. Positive increase or lesser decline in occupancy level as compared to the previous period were observed as well. Fewer establishments reported decline in revenues with more entities earning higher incomes, however maintenance costs were higher in the larger number of entities. Certainly, entrepreneurs expected better results in the summer holiday. Unfortunately, due to still unsatisfactory share of foreign guests during the summer holiday, the situation was not much better. As the number of infections continues to increase and there is no visible pandemic extinction, entrepreneurs expect state support, mostly in the form of financial aid, but also in the form actions aimed at decreasing operational costs. They also opt for new solutions that will make it possible to operate their businesses even during the pandemic.

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