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Business innovations in Poland's tourism sector during the COVID-19 pandemic

Abstract. The COVID-19 pandemic has severely affected the tourism and hospitality industry. Lockdowns undermined the existence of many companies in this sector; some businesses were forced to shut down. Everyone was looking for alternative ways to continue doing business and survive the crisis. One of the obvious choices regarding the necessary transformation of activities was the Internet. Since it was impossible to go on doing business the usual way, many companies moved their activity to the virtual sphere. This, however, required developing new business models and the Internet turned out to have a lot of potential in this regard. The following article contains a comparison of Internet-based business models used in the hotel, tourism and catering industries. The study is based on a review of literature, the trade press and regulations as well as case studies. The comparison focuses on new information content added to websites, ways of maintaining contact / relationship, provision of basic services and marketing communication. The pandemic created many new opportunities and forced companies to develop new ways of implementing existing services or introduce new solutions, which were identified in the study. The most important finding is that while the pandemic was a difficult period for the industry, it has generated some added value that can expand the range of available services.

Keywords: tourism, hospitality, catering, pandemic, new forms of business activity

JEL codes: D22, L83

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1. Introduction

Market participants compete with one another by trying to gain an advantage over their competitors. A competitive advantage is achieved when an enterprise can offer its customers a better product or service, achieves better economic results or has a larger market share. If there is no chance of gaining an advantage, the goal is to survive. In the context of the COVID-19 pandemic the mere fact of surviving could also be viewed as a kind of competitive advantage. On the other hand, creative business owners faced with lockdowns and restrictions were able to develop new business models, which enabled them not merely to survive but gain a competitive advantage. The tourism industry was one of the sectors where companies had to demonstrate a lot of creativity during the pandemic.

The article is a study of business innovations in the tourism, hotel and catering industry in Poland, developed as a result of the COVID-19 pandemic. The review of practices undertaken in the tourism sector is based on a review of literature, the trade press and regulations as well as case studies.

The research problem can be expressed in the following questions:

- 1) What innovative ways of doing business have tourism industry entrepreneurs come up with to survive the COVID-19 pandemic?
- 2) Which of these new forms of doing business are likely to be established in the industry after the pandemic ends?

The aim of the study was to compile a list of practices and creative forms of doing business that could be applied more widely in the tourism industry.

2. The consequences of the pandemic in the tourism sector

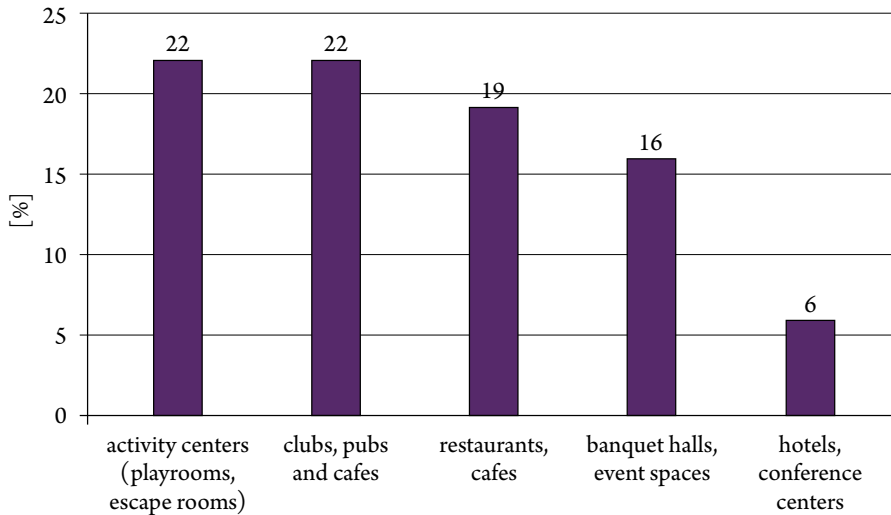
According to *Raport HORECA 2022*,¹ nearly 20% of establishments in Poland's catering and event industry did not survive the two-year COVID-19 pandemic (*Raport HORECA, 2022, p. 41*), as shown in Chart 1. The negative effects of the pandemic were also experienced by activity centers (e.g. playrooms, escape rooms) as well as clubs and pubs (*Raport HORECA, 2022, p. 44*).

Hotels were the least affected by the pandemic crisis (only about 6% did not survive) because they had the largest capital resources compared to other entities

¹ The report was prepared by the Briefly portal (askbriefly.com) on the basis of information about 430 catering and event venues from Poland. HORECA is a syllabic abbreviation representing the words **H**otel/**R**estaurant/**C**afé, which is the term used for the food service and hotel industries, mainly in the Benelux countries and in Switzerland.

in the industry, and starting from the second lockdown they were allowed to function to a limited extent (*Raport HORECA, 2022, p. 44*).

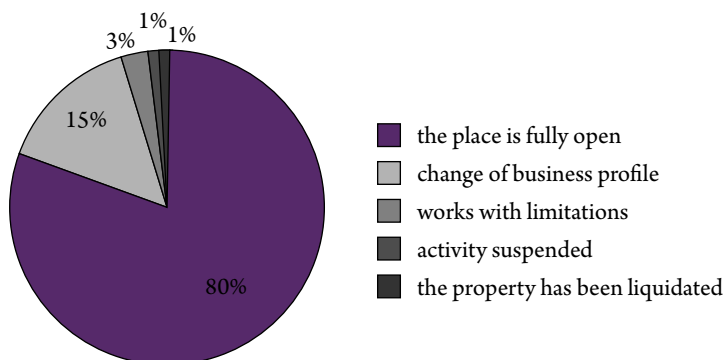
Chart 1. Percentage of enterprises that did not survive the pandemic (May 2022 vs. March 2020)



Source: *Raport HORECA, 2022, p. 54*.

The impact of the pandemic on the operations of hotels, restaurants and event facilities is presented in Chart 2.

Chart 2. Restaurants, hotels, event spaces after the pandemic (May 2022 vs. March 2020)



Source: *Raport HORECA, 2022, p. 43*.

The report also identified the following trends:

- instead of large weddings, couples opted for more intimate wedding dinners for about 20-30 guests (p. 18),
- most communion receptions were moved to fall 2020 (p. 18),
- in the last 12 months, the tourism industry, especially restaurants and hotels, suffered the most as a result of a decline in team-building and corporate events (p. 11),
- the last year was a period of positioning, adjusting, waiting rather than planning and specific investments (p. 40),
- currently (May 2022), customers still think in terms of pre-pandemic prices and are not taking into account the rising costs of energy, gas, fuel, product prices and wages (p. 47), which has an effect on price sensitivity.

3. Government measures to support the tourism, hotel and gastronomic industry and the creation of new operating conditions during the pandemic

The pandemic hit the tourism, hospitality and gastronomic industries right from the beginning. Since the state of epidemic threat and then the state of the pandemic was announced in March 2020, the first restrictions were imposed, particularly in the catering industry (closures of restaurants), and then in the hotel and tourism industry (the ban on the provision of accommodation services for non-business purposes). The forced stagnation practically lasted until May 2020. In the summer 2020 business operations were resumed in an attempt to make up for the losses. With the second wave of the pandemic in October 2020, new restrictions were introduced (fewer tables in restaurants, shorter opening hours, complete closures of stationary activities). The occupancy rate in hotels fell by half, then decreased even further when only business stays were allowed, and in December 2020 hotel facilities could only be used by medics and uniformed services. The restrictions continued into the third wave of the pandemic in early 2021. In the spring, hotels were allowed to operate while observing strict sanitary measures. It was not until May 2021 that restaurants were allowed to open under the sanitary regime. The summer of 2021 was once again a period when companies in the industries affected by the pandemic were able to recover to some extent. Later in the year, despite announcements of successive waves of the pandemic, the situation started to stabilize and the restrictions were gradually relaxed (ZPP, 2021).

Nevertheless, from the very beginning of the pandemic (March 2020), the government tried to support the economy, especially the tourism, hotel and gastro-

conomic industries, which were among the most affected by the pandemic. A series of measures, known as anti-COVID shields, were prepared to support entrepreneurs and mitigate the negative effects of the pandemic. The set of anti-COVID shields was initiated by the Act of March 2, 2020 on special solutions aimed at preventing and combating COVID-19, other infectious diseases and crisis situations caused by them (Ustawa, 2020a). It was the anti-COVID shield denoted 1.0. The following shields included:

- 2.0 – Act of 16 April 2020 on specific support instruments related to the spread of SARS-CoV-2 virus (Ustawa, 2020b),
- 3.0 – Act of May 14, 2020 amending certain acts concerning protective measures in connection with the spread of SARS-CoV-2 virus (Ustawa, 2020c),
- 4.0 – Act of 19 June 2020 on interest subsidies for bank loans granted to entrepreneurs affected by the effects of COVID-19 and on simplified procedures for approving this arrangement in relation to COVID-19 (Ustawa, 2020d).

The above-mentioned acts set out the principles of providing aid to entrepreneurs who suffered losses as a result of the pandemic. The aid package proposed by the government provided for, for example, layoffs, subsidies, division into installments or suspensions of social security contributions or taxes, standstill subsidies aimed at maintaining jobs, government loans to businesses, loan guarantees or subsidies to loan installments.

In the summer of 2020, when the restrictions were relaxed after the pandemic had subsided, the Act of 15 July 2020 on the Polish Tourist Voucher (Ustawa, 2020e) was also passed, which granted a benefit in the form of a voucher worth PLN 500 for each child. The voucher was an incentive for people to use hotel, tourism and catering services and to help the industry recover make up the losses.

It is worth noting that while the tourism, hotel and catering industries could benefit from the first shield, it was only the following shields (5.0-8.0), known as industry shields, that contained targeted and more systematic support for these industries (KRD, 2021).

Shield 5.0, introduced by virtue of the Act of 17 September 2020, which amended the first shield and some other acts (Ustawa, 2020f), catered for the needs of hotels, travel agencies, tourist guides, and entrepreneurs involved in the organization of trade fairs, exhibitions and congresses. The act provided for the payment of standstill benefits for those engaged in activities with a specific designation in the Polish Classification of Activities (Polska Klasyfikacja Działalności, PKD). The benefit was available for entrepreneurs in the excursion, tourism transport, entertainment and recreation industries as well as those involved in the organization of live performances. The act also made it possible to apply for wage subsidies or an exemption from the obligation to pay social insurance contributions for three months. The Shield 5.0 also established the Tourism Aid Fund, which is a separate account in the Insurance Guarantee Fund. The creation of an

Assistance Fund was deemed necessary to support tourism organizers in future situations similar to the crisis caused by the outbreak of COVID-19. The Polish Development Bank (Bank Gospodarstwa Krajowego) also established a Tourist Refund Fund, which is an account created to handle refunds to travelers for tourism services cancelled as a result of the pandemic.

Support measures for the catering industry were included in Shield 6.0, by virtue of the Act of 9 December 2020, amending the first shield and some other acts (Ustawa, 2020g). The list of measures included exemptions from social security contributions, microloans, the possibility of applying for a subsidy of up to PLN 5000 and downtime benefits, wage subsidies in order to maintain jobs.

Successive shields extended the availability of aid measures and supplemented the list of eligible activities. Shield 7.0 was introduced in the form of the Regulation of the Council of Ministers of January 19, 2021 regarding forms of support for economic entities affected by the COVID-19 pandemic (Rozporządzenie, 2021a). Another regulation of the Council of Ministers of February 26, 2021 (Rozporządzenie, 2021b), came to be known as Shield 8.0.

Aid measures for the tourism, hotel and catering industry were available to hotels, short-term accommodation facilities, campsites, healing and rehabilitation spas, restaurants, mobile catering establishments, catering companies, tourist agents, tourism organizers, travel and tourist guides, museums and cultural facilities. The sector also received assistance from local government authorities in the form of suspensions of local fees, rents, exemptions from fees for garbage collection and support in promoting their facilities (*Recepta dla turystyki*, 2021).

While aid measures offered by the state and local government provided protection and sometimes even saved businesses from bankruptcy, they could not compensate for losses incurred after several months of business suspension. In an effort to survive and retain jobs, enterprises in the tourism, hotel and catering industry had to find new creative ways of doing business in these extremely difficult conditions.

4. New solutions and business models during the pandemic

4.1. The tourism and hospitality sector

The outbreak of the pandemic and the resulting obligation to suspend their activity prevented tourism companies from delivering services, even those that had already been paid for. The first anti-COVID shield, in Art. 15k para. 2, introduced a solution in the form of a voucher: when a tourism service cannot be delive-

red because of the pandemic, the tour operator can offer the customer a voucher that can be redeemed within two years from the date when the service was to be provided. If the customer agrees to this option, the withdrawal or termination becomes ineffective. The value of such a voucher cannot be less than the amount paid for the already purchased service, and will be guaranteed by the state should the tour operator become insolvent. Such vouchers had been used previously, but not on such a scale and without the state's guarantee. The introduction of a voucher as a kind of guarantee may gain popularity in the future and become a form of a prepaid service.

During the period of forced downtime, companies had to find something to do. Initially, the hospitality industry turned to (*Koronawirus a hotele*, 2021):

- renovation and conservation works,
- inventory inspections,
- organizing training courses for their staff, mainly in the form of webinars,
- analyses and summaries of activities carried out so far, e.g. using reports from the hotel system,
- searching for new opportunities in which the facility could be used.

Hotels quickly realized that they could continue operating by taking advantage of their catering facilities to prepare take-out meals that could be delivered directly to customers. Initially, many hotels prepared meals for medical staff, which were delivered to hospitals free of charge. As this kind of service became more popular, hotels began to serve individual clients as well. The meal offering was usually modified. Sophisticated and rather highly priced dishes usually found in hotel menus were replaced by more standard and affordable alternatives.

As the restrictions were relaxed, hotels gradually resumed their operations. Initially, however, rooms could only be shared by medics and members of uniformed services performing their duties related to the combating of the pandemic. For some time, hotels were also used as places of compulsory quarantine. Later on, hotels were allowed to accommodate individual guests, but only on business trips. Obviously, revenue from this group of customers was rather limited. It was only to be expected that hoteliers would try to circumvent the rules. When hotels were closed during the winter holidays, "new services" were offered, such as renting rooms as ski storage facilities (with sanitary and accommodation facilities), care services for children of parents who came to hotels to work remotely, etc. (Piotrowski, 2020). A return to some kind of normality was only possible in the summer, although there were still some restrictions: there were limits on the number of guests in hotels and in the rooms and the obligation to observe strict sanitary measures.

It was clear that Poles were eager to travel, but because of the requirement to test for COVID-19 and the risk of quarantine when traveling abroad, domestic tourism was preferred (Gabryjończyk & Gabryjończyk, 2021, p. 56), so the tour-

ism industry focused on promoting its services on the internal market. Emphasis was placed on hotel facilities' compliance with sanitary standards. The terms of service cancellation were extended, free changes of dates were made possible, the use of guarantees in the form of vouchers was emphasized. New forms of customer service were also introduced to reduce the risk of infection, such as in-room breakfasts instead of an open buffet. Hotels also experimented with electronic applications for staff and self-service kiosks for customers. Non-cash payments became the norm. Small accommodation establishments also introduced non-contact forms of services, such as key boxes, electronic cards instead of keys, room access codes sent via text messages. These technological changes are likely to become permanent in the industry.

A number of completely new trends and phenomena can also be observed in the industry. One of them is known as *glamping*,² which refers to a more comfortable campsite, conveniently located, with high standard facilities and often with the addition of hotel services. For tourists afraid of crowds and the risk of infection, this new type of camping was an opportunity to spend a holiday in an attractive place and very good conditions, but away from crowds of people. Another new idea in tourism is workation, which refers to a combination of remote work and vacation (*Turystyka w czasach pandemii*, 2021). Instead of working from home, employees perform their normal duties in a holiday location. However, they do not use their vacation days because they are formally at work. After work, they can enjoy local attractions (*Turystyka w czasach pandemii*, 2021). Such offers, although already known before the pandemic, were popularized by some travel agencies, such as ITAKA (*Workation*, 2022). The growing popularity of remote work, which does not seem to be diminishing after the pandemic, is likely to contribute to the future development of this kind of service (Borko, Geerts & Wang, 2020). This form of tourism is also in line with the modern *bleisure* trend, which is a combination of business and leisure activities. It is also expected to be a developmental direction in tourism (Gorynia & Nickel, 2021).

Another opportunity for hotels is to develop new services, also once the pandemic is over. Given the effects of the coronavirus disease, hotels could gain new customers by offering a wider range of services related to rehabilitation, thematic stays or other forms of health activities beyond the standard SPA offering (Juszczak, 2020; *Wellness Travel*, 2022).

It is worth noting that because of the pandemic, the map of Polish tourist attractions could feature a number of new places, located away from crowded resorts and main holiday destinations. Because holiday makers wanted to avoid large cities and crowds of tourists (Sztuk, 2021, p. 156), they often opted for more secluded places, which they considered to be safer. In this way, hith-

² A blend of *camping* with the adjective *glamorous*, to convey the idea of glamorous *camping*.

erto unknown places have been discovered and perhaps in the future their tourism potential will be recognized by more people. After a return to normality, the importance of domestic tourism is predicted to increase (*Wellness Travel, 2022*), which also offers an opportunity for the industry to recover.

During the pandemic, there was an evident shift towards online operations across all industries. Online traffic increased, as some companies started launching their first websites, others were expanding or improving existing ones, or adding new distribution channels in the form of an online store. In the hotel industry, pre-pandemic websites were a common channel of communication and promotion, featuring systems for online booking, but during the pandemic rather than spend money to boost sales, companies chose to strengthen their online presence in an effort to maintain relationships and for the purpose of marketing communication. Hotels focused on content marketing, improving descriptions of their facilities and available services as well as providing information about valuable attractions in their surrounding area with the view to encouraging visitors to benefit from the offering, if not right away, then once the restrictions had been lifted. While not all establishments could afford to pay for proper search engine optimization services, those that did used this opportunity to give them a competitive advantage. A lot more effort was put into building relationships in social media. Hotel fanpages on Facebook or Instagram featured photos and latest news, while YouTube channels included videos showing, for example, how sanitary measures were implemented or what attractions awaited guests. Some hotels offered virtual tours of their facilities, while most provided various ways of keeping in touch with potential guests via social media, phone or e-mail. All contacts with customers were used to create remarketing lists, the potential of which could be used after the pandemic to create strong promotional and sales campaigns (Kachelska & Zimny, 2020). Other types of content included promotional films and animations, competitions and promotional quizzes with prizes in the form of tickets and special invitations for long-term use.

Many tour guides have also decided to go online. While it was relatively easy for museums, art galleries, exhibitions or other cultural facilities to launch online tours very quickly after lockdowns started, tour guides could not do their work, because initially people were advised to stay at home and periodically even banned from travelling. However, when the restrictions were lifted, tour guides became more active, offering online tours of old towns of large cities and showing other interesting places not included in typical tourist routes. One example of an online offering is the website called Guides Without Borders (*przewodnicybezgranic.pl*), created by a group of about 50 Polish guides from 24 countries to share their knowledge and experience online. The website features an interesting travel blog, a possibility of buying and sending virtual postcards from around the world - and most importantly, virtual tours of interesting places for an affordable fee. Currently, website users can also purchase sightseeing tours in actual destinations.

Some guides turned to writing guidebooks while waiting for the pandemic to end. Unfortunately, many guides had to take up other jobs in order to survive.

4.2. Restaurants

After the outbreak of the pandemic, when catering establishments were not allowed to serve customers on their premises, they quickly switched to offering take-out meals. Initially, they started to serve hospitals and deliver meals to medics fighting the pandemic. Later on, individual customers began ordering meals to be delivered home. Over time, the range of services was expanded to include small home events with a more varied menu and the option of renting crockery, cutlery, and even chairs and tables. In order to better reach their potential customers, many restaurants created websites to enable online orders. However, the provision of take-out meals was not enough to reach pre-pandemic turnover levels. The catering industry had to find new ways of earning revenue. One example of these new strategies was to launch online stores. Many restaurants started offering ready-made preserves, including traditional, home-made dishes as well as more sophisticated ones, which few would be able to prepare at home, such as confit duck with apples, BBQ ribs, boeuf bourguignon, beef cheek in demi-glace sauce, butcher's steak in pepper sauce or duck stomachs in tarragon sauce (Ed Red, 2022).

In addition to ready-made dishes, restaurants started offering semi-finished products and ingredients to prepare dishes at home, e.g. a homemade pizza set (Pizzeria Girasoli from Legionowo). The set included ready-made dough, sauce, topping ingredients and recipe instructions (Brzoskowski, 2020). The same do-it-yourself approach was adopted by some bakeries, which offered sourdough for home-made bread. Other options included long-term services, such as food subscriptions, including meals, e.g. for a week or a month.

The crisis also demonstrated the strength of social media advertising: eateries that had built good relations with their customers before the pandemic had a clear advantage. But traditional social media activities were not sufficient to sustain relationships with customers. That is why many restaurants as well as other entities in the catering industry used their social channels to launch original, creative initiatives, such as films or webinars with cooking lessons, online cooking sessions or began organizing tasting festivals preceded by home deliveries of products to be tested. Such initiatives were a great opportunity for the catering industry to maintain stability and customer loyalty.

Many restaurants introduced technological solutions to improve sanitation safety, e.g. menus that could be displayed on customers' phones after scanning a QR code provided on the table. Another trend that could be observed during the

pandemic was a considerable increase in the number of mobile catering outlets, such as food trucks or catering trolleys.

Some restaurant owners, unable to serve customers on the premises during lockdowns, came up with ways of circumventing the restrictions by employing customers as dish testers. The remuneration was usually symbolic and the testers had to pay for their meals. Customer-employees were allowed to stay in the restaurant and eat their meals. Of course, such practices were frequently curbed by health authority or labor inspectors imposing penalties on 'creative' owners. This, however, did not stop other restaurateurs from finding new loopholes to keep their premises open, for example by organizing party meetings, training sessions, *savoir-vivre* lessons, or employing extras to shoot advertising spots of their establishment (*Otwarcie restauracji*, 2021). A online initiative #otwieraMY (#WEopening) called for a boycott of the restrictions imposed on the catering industry and urged owners to come up with pretexts to open restaurants.

The pandemic also necessitated certain changes in restaurants' offerings. First of all, menus became considerably shorter, owing to higher costs and limited availability of ingredients. Experts predict that shorter restaurants menus will be a new trend in the future. Eateries are expected to increasingly rely on local, readily available ingredients and limit their menus to specific dishes. This will result in a greater market diversity, with restaurants specializing in selected dishes, ingredients or methods of food preparation rather than in particular cuisines (*Skutki pandemii*, 2022). This prediction is also supported by the observed preference for local products during the pandemic, not just among consumers but also restaurant owners, who preferred to rely on local suppliers. As a result, menus became more regional. Another important consideration in this case is the growing ecological awareness and the concern about product quality.

Like elsewhere, the pandemic generated a lot of solidarity within the restaurant industry itself and from its customers. Restaurants exchanged discount coupons, which were given to customers in an effort to promote their competitors' offerings. Customers and restaurant owners organized online campaigns to support and save establishments threatened by bankruptcy.

5. Conclusions

The crisis in the tourism, hotel and catering industries caused by the pandemic had been the worst in years. Many companies suffered great financial losses and had to lay off employees and some businesses went bankrupt. Others reinvented themselves in order to survive in the new reality. Many Polish restaurateurs, hoteliers and representatives of the tourism companies came up with creative solutions to stay on the market and gain a competitive advantage. If these new ideas

are permanently retained, we will benefit from a greater diversification of services and a more competitive market.

Large hotels are unlikely to continue offering take-out meals but will probably keep providing catering services and deli preserves. Technological solutions introduced during the pandemic are also likely to stay. It seems that the greatest opportunities for hotels are associated with the development of health and rehabilitation services. Another promising direction is combining work with recreational activities through concepts such as workation or bleisure, especially if remote work does not disappear after the pandemic. On-line tourism, as exemplified by Guides Without Borders, could become a permanent market niche, especially as an alternative for people with disabilities or those who cannot afford to travel abroad.

In the catering industry, take-out meals and home deliveries as well as catering and deli services are likely to remain a regular option. Solidarity shown to local entrepreneurs during the pandemic may turn into a greater appreciation for regional cuisines and cooperation with local suppliers. Other novelties that could be continued after the pandemic include shorter menus or the use of QR codes instead of traditional menus. These ideas, together with greater concern for ecology, are in line with current consumer trends.

Finally, it is worth noting that the pandemic crisis necessitated a more effective management of companies' finances, better work organization and more efficient communication with employees. It can be said that the pandemic became a crash course in crisis management for industry managers. For many companies it was also an opportunity to expand their presence in social media and develop their e-commerce channels. All of these aspects constitute the added value that enterprises in the tourism, hotel and catering industries generated as a result of the pandemic.

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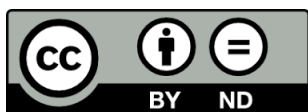
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Innowacje w sektorze turystycznym w Polsce w czasie pandemii COVID-19

Streszczenie. Pandemia COVID-19 była wyjątkowo dotkliwa dla branży turystyczno-hotelarskiej. Okresy kwarantanny i inne restrykcje sparaliżowały działalność tego sektora, stawiając pod znakiem zapytania istnienie wielu przedsiębiorstw na tym rynku i zmuszając niektóre firmy do

zamknięcia działalności. Wszyscy poszukiwali alternatywnych sposobów dalszego prowadzenia działalności i utrzymania się na rynku. Jednym z oczywistych pomysłów na konieczną transformację był Internet. Ponieważ nie można było funkcjonować w dotychczasowy sposób, wiele firm postanowiło przenieść działalność do sfery wirtualnej. To, jednak, wymagało opracowania nowych form działalności biznesowej. Artykuł zawiera porównanie modeli działalności wykorzystujących potencjał Internetu, jakie wypracowano w hotelarstwie, turystyce i gastronomii. Badanie jest oparte na przeglądzie literatury naukowej oraz publikacji branżowych i przepisów a także na analizie przypadków. W porównaniu pod uwagę wzięto m.in. rozszerzony zakres informacji na stronach internetowych, sposoby utrzymywania kontaktu/relacji, realizację podstawowych usług, a także prowadzenie komunikacji marketingowej. Pandemia stworzyła wiele nowych możliwości i zmusiła firmy do opracowania nowych sposobów realizacji dotychczasowych usług lub wprowadzenia nowych rozwiązań, które opisano w artykule. Na tej podstawie można stwierdzić, że choć pandemia była trudnym okresem dla całej branży, przyczyniła się do powstania wartości dodanej, która może poszerzyć zakres dostępnych usług.

Słowa kluczowe: turystyka, hotelarstwo, gastronomia, pandemia, nowe formy działalności



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