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## SELECTED TRENDS OF TOURISM BETWEEN 2017 – 2021: THE CASE STUDY OF MORAVIAN – SILESIAN REGION

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### Abstract

This paper evaluates selected tourism trends in the Moravian-Silesian Region between 2017 – 2021 when the COVID-19 pandemic began. Despite the increasing number of tourists in the Moravian-Silesian Region, it was the COVID-19 pandemic that brought back the tourist numbers reported about ten years ago. Within the institutional support project Trends in Tourism in the Moravian-Silesian Region, the researchers focused between 2017 – 2019 and “Trends and innovations in tourism in the Czech Republic 2020” on identifying trends in tourism in the MSK on both the demand and supply side. To obtain information on the attitude of customers to the studied issue, the method of written and electronic questioning, analysis, synthesis, generalisation and deduction was used. From the results of the survey and the comparison of opinions on the supply and demand side, the most important trends of tourism in the Moravian-Silesian Region were identified, with an emphasis on the use of the Internet and the popularity of discount portals, interest in extreme experiences, active and adventurous trips, discovering unique places, growing interest in gastronomic tourism and sightseeing tourism, and the growth of tourists’ demands for services (quality/price ratio). Since 2020, not only in the Moravian-Silesian Region, a pandemic of COVID-19 has manifested itself, with several restrictions that have not escaped the tourism industry.

*Keywords: tourism, trends, Moravian-Silesian region, Covid-19*

**JEL Classification: C32, L83, O10**

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### Introduction and theoretical background

The global tourism industry has been hard hit by the COVID-19 pandemic, with the World Tourism Organization predicting the possible loss of 1.1 billion international visitors and 1.2 trillion in export revenues (Roberts, 2022). Tourism is one of the most important emerging industries, but it also has a significant impact on society, the economy, and the environment. Researchers need to devote more attention to understanding the factors that influence tourism (Herman et al., 2020). Trends, cycles, and seasonality are three key factors that shape tourism demand (Vatsa, 2020).

According to Kajzar (2018, p. 46), tourism has different economic importance for different destinations. On the one hand, tourism attracts foreign investment, increases interest in business activities, and, on the other hand, leads to improvements in the infrastructure of individual destinations. As stated by the UNWTO, in addition to the economic side of tourism, tourism also plays a social or cultural role (Pellešová & Kajzar, 2017). The decline of natural attractions, landmarks, infrastructure, artifacts, and environments is a major problem for tourism destinations around the world (Bec et al., 2021).

According to Pellešová et al. (2019) globalisation is manifesting itself in various sectors, not most minor tourism. Globalisation manifests itself on the supply and demand sides, with people's wants and needs changing over time (Matijová et al., 2019). The contribution of tourism to economic growth and development has long been identified and affirmed. Globally, the tourism industry is one of the critical sectors of the world economy that contributes immensely to creating jobs, generating huge revenues, and promoting economic prosperity. It is also one of the fastest-growing sectors (Bazargani & Kilic, 2021).

The COVID-19 pandemic has had a profound impact on all aspects of human life, including the economy, society, and the way we use social media (Ngo et al., 2022). The Covid-19 pandemic began to manifest itself in Czechia in early 2020. As part of this pandemic, not only in the Czech Republic, various restrictions have been introduced, ranging from travel bans between countries to bans on visiting selected tourism businesses. Due to these restrictions, new forms of tourism have begun to emerge or innovate, including virtual reality. For example, hotels, restaurants, zoos, and theatres have started to use virtual reality. Virtual reality represents a new direction of how selected tourism enterprises and tourist attractions can become more accessible to people without visiting the enterprise or place. (Roman et al., 2022). Many things have changed in every field due to the COVID-19 pandemic. Given the rapid spread of the coronavirus, the heads of state and governments had to respond to the virus. As government restrictions have been introduced, people started to reconsider their decisions in terms of consumption and saving. The closures affected many areas that changed people's daily lives. As a result, new trends have appeared, for instance, in tourism and people's shopping habits (Machova et al., 2021). According to Ferrer-Roca et al. (2021) main tourism trends in Europe are: evolving visitor demand; marketing; stakeholders and tourism governance; new technologies; and sustainable and responsible tourism.

The Moravian-Silesian Region (MSR) survey in 2017 and 2020 showed changes in the offer and quality of services of accommodation and catering companies due to the customers' changing preferences. The formulation of new trends in this part of the offer of tourism can serve as an inspiration for local entrepreneurs in the region and lead them to develop new products and introduce new services to increase their business success and also to increase tourist attendance in the region (Kostková et al., 2022).

Some trends in tourism are listed in the Strategy of Tourism Management in the Moravian-Silesian Region. The Moravian-Silesian Region has decided to update its regional innovation strategy (along with a comprehensive development strategy for developing the region) based on strategic documents prepared by the EU (Europe 2020) and the Czech Republic for this period 2010-2020 (Kajzar et al., 2020).

Following the mentioned document, the list of current trends in tourism involves Kajzar et al. (2020)

- The Internet as the most frequent and most important source of information, word of mouth, and personal recommendation (showing a more significant impact than promotion events of destinations),
- The Internet as the primary communication channel – decisions are influenced by online reviews, web pages of accommodation facilities, tourist areas and tourist attractions – the presentation form is fundamental,
- An increase related to online sales of products and services in tourism and an increasing number of direct bookings (not using travel agencies),
- An increasing number of senior and young tourists (between the ages of 16 and 35),

## Material and methods

This paper aims to evaluate selected tourism in the Moravian - Moravian-Silesian region between 2017 and 2021, when the Covid-19 pandemic began. Within the project related to the institutional support “Trends in Tourism in the Moravian-Silesian Region 2017-2019” and “Trends and Innovations in Tourism in the Czech Republic 2020, the author and his colleagues have focused, among other things, on the prediction and estimation of the tourism trend development in the area of tour operators and travel agencies, providing services in the Moravian-Silesian Region, and also on clients, their preferences, and shopping decision making which has been analysed within the found trends, then on too services accommodation and catering companies that consisted of the representatives in the hotels, guesthouses and restaurants of various types of establishments and service quality level, selected from the point of view of the size.

The research was carried out in 2017 - 2020 through The Czech Association of Hotels and Restaurants, an electronic and written survey in MSR. The sample of respondents was 334 customers from accommodation and catering establishments and 698 customers from travel operators and travel agencies.

The table below shows the numbers of participating catering, accommodation tour operators and travel agencies.

Table 1. Summary of numbers of participating catering, accommodation and tour operators and travel agencies (2017 – 2020)

Size of participating catering facilities,	Count
Σ	99
Size of participating accommodation facilities,	
Σ	24
Size of participating tour operators and travel agencies	
Σ	29

Source: Author's editing

The primary data was acquired from the selected tourism enterprises using systematic sampling (also called systematic random sampling); every N<sup>th</sup> member of

tourism enterprises was selected to be included in the study. It has been stated that “with systematic sampling, every  $K^{\text{th}}$  item is selected to produce a sample of size  $n$  from several tourism enterprises of  $N$ ”. Systematic sampling requires an approximated frame for a priori but not the complete list.

## Results and discussion

The Moravian-Silesian Region is a geographically very diverse region. From the west, it is surrounded by the Hrubý Jeseník massif with the highest peak of the region and the whole Moravia - Praděd Mountain (1 491 m above sea level). The highland gradually transitions into the Low Jeseník, a plateau with more gentle terrain, and the Oder Hills. The central part of the region is characterised by the densely populated lowland terrain of the Opava Lowland, the Ostrava Basin and the Moravian Gate. Towards the southeast, the landscape regains its mountainous character. It culminates in the ridges of the Beskydy Mountains - at the Slovak border of the Moravian-Silesian Mountains with the highest peak Lysá hora (1 323 m above sea level) and the Silesian Beskydy Mountains on the border with Poland.

The districts of Bruntál, Frýdek-Místek, Karviná, Nový Jičín, Opava and Ostrava-City define the Moravian-Silesian Region. It is divided into 22 administrative districts of municipalities with extended competence, including 300 municipalities, including 42 towns. With an area of 5 431 km<sup>2</sup>, it occupies 6.9% of the territory of the entire Czech Republic and thus ranks 6th among all regions.

The traditional cultural centres of the region are Ostrava, Opava and, for the Těšín region with a significant Polish minority, Český Těšín. The region has many theatres, museums, galleries and cinemas.

In addition to cultural and sporting activities in towns and villages, northern Moravia and Silesia’s picturesque and varied nature provides countless opportunities for recreation, hiking, sightseeing, and spa stays. In summer, the region offers conditions for hiking and cycling thanks to an extensive network of hiking trails. At the same time, in winter, the mountains of the Hrubý Jeseník and Beskydy Mountains are popular centres for cross-country and downhill skiing.

As can be seen from the table below, the total number of tourists, both resident and non-resident, including the total number of nights spent by tourists in the MSR, has been increasing until 2019. During 2020, the COVID pandemic began to take effect, and the total number of tourists in the MSR dropped by more than 40% that year. In 2021, despite a slight increase in the number of tourists in the MSR, the number of tourists did not reach the number of previous years. It was beginning to show during the pandemic period mainly that the number of foreign tourists was decreasing due to various restrictions. On the contrary, the number of domestic tourists visiting the MSR slowly increased. In 2020, the most frequent arrivals to the region were day visitors came to the region (day trippers). On average, the highest daily spenders in our region were foreign visitors. The driving force in visitor traffic in the Moravian-Silesian region in 2020 was the mountains. The most visited tourist area was Beskydy-Vallachia. Compared to 2019, the pandemic caused a decline in visitor numbers. The Jeseníky-East region of Ostrava was overtaken. The first place in the length of stay belongs to Těšín Silesia. Těšín, where tourists spent an average of 3.9 nights, thanks to spa tourism.

Table 2. Occupancy in collective accommodation establishments

Guests total		including		Overnight stays total
		Residents	Non-residents	
2017	896 742	705 195	191 547	2 551 815
2018	985 795	773 173	212 622	2 752 191
2019	1 015 746	799 295	216 451	2 846 835
2020	612 681	539 951	72 730	1 853 005
2021	645 902	573 576	72 326	1 922 160

Source: CZSO, 2021.

A trend similar to the number of tourists in the MSR was also evident at Leoš Janáček Airport. In 2018, the airport handled a record number of passengers, 377,936. The most considerable decrease in the number of checked-in passengers affected the airport in 2020, mainly due to the closure of the airport from 14.03.2020 to 26.05.2020, the reduction of scheduled flights; the summer season started only on 1.7.2020 and also the reduction of summer destinations to 2 (Heraklion and Burgas).

Table 3. Development of passenger numbers, Leoš Janáček Airport, MSR

Type of transport	2017	2018	2019	2020	2021
Regular	126 805	116 418	61 799	18 104	12 289
Irregular	193 317	258 719	257 806	16 764	117 968
Other	3 994	2 799	3 715	2 841	7 301
Σ	324 116	377 936	323 320	37 709	137 558

Source: Airport-Ostrava, 2021

The trend of declining tourist numbers was also reflected in the number of conferences held in the MSR and the number of participants. The table below shows a decline in the number of participants and conferences in 2020. More use was made of online conferences, which saved participants time and costs.

Table 4. Conferences at collective accommodation establishments in MSR

	Number of participants	Number of conferences
2017	79 509	620
2018	68 980	620
2019	73 850	701
2020	19 845	217
2021	24 744	299

Source: CSZO, 2021.

The top 10 tourist destinations Ranking for the top three most popular tourist destinations in the MSR is the same as in 2019. The most visited tourist destination remains Dolní Vítkovice, with Zoo Ostrava in second place and the Wallachian Trail

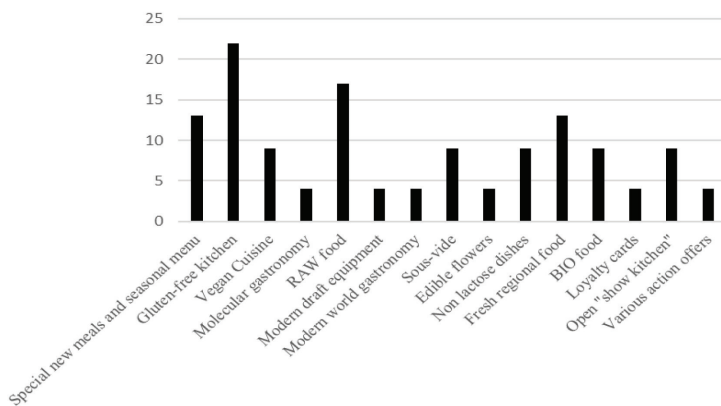
in third place. The decline in 2020 for selected MSR tourist attractions is up to 64% compared to 2019.

### Survey of tourism trends in the Moravian Silesian Region between 2017 - 2021

The research was divided into accommodation, catering tour operators and travel agencies. According to Pellešová et al. (2019), in the catering sector, customers were asked on the demand side about using novelties in restaurant offerings, which are crucial for about 35% of respondents and unimportant for about a quarter. Menu novelties are often or sometimes tried by about 57% of respondents, with a tried and tested and regular menu preferred by about 8.5%. Of the special offers, respondents voted foreign cuisine days first, venison feasts second, and killing feasts third, followed by trendy mixed drinks, medieval pub, wine tasting, tea and coffee tasting, and Raw food menus. About a third of respondents will try new recipes following modern trends. Respondents would like to try food and wine pairing, exotic menus and tea and coffee.

On the supply side, opinions on the introduction of modern trends in the menu and knowledge of factors influencing customers' purchasing decisions were collected through structured interviews with managers. Introducing innovations to the menu and following modern trends increases competitiveness, improves image and public interest, and increases footfall and sales (confirmed by more than 75% of respondents). SME representatives stated that introducing new trends is a necessity for success and that it is necessary to follow them and be able to adapt to them (76%). Half of them consider it essential to differentiate themselves from competitors and want to introduce modern trends into their offer in the future. SMEs focus on introducing modern trends to their menu, and the most common innovations they introduce are gluten-free dishes, RAW diets, seasonal specials and using fresh ingredients to prepare dishes. The figure below shows the most frequent modern trends demanded by the customers in the restaurant menu.

Figure 1. The most frequent responses of customers on modern trends in the restaurant menu, in (%)



Source: Kostková, M. et al., (2022)

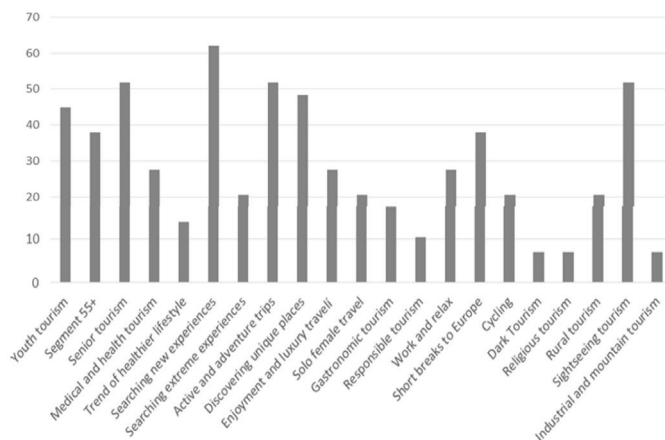
In the area of accommodation facilities, customers would like to see wellness services in the first place, modernisation of additional services and more care for the facility's website in the second place, and new fitness, tennis, and golf in the third place. Benefits for regular customers, upgrades to the internet, and technology followed this. In order of importance for repeat customers, cleanliness and orderliness, professional demeanour, internet booking, Wi-Fi, knowledge of the offer and ability to give maximum information, speed of service, appropriate price/quality ratio, affordable prices, language skills, good promotion of the offer on the internet and modern facilities are all important.

According to Kajzar et al. (2020), the most significant trends in tourism according to customers in the MSR include in particular:

- Searching for new experiences,
- senior tourism,
- active and adventure trips,
- sightseeing tourism,
- discovering unique places,
- youth tourism.

From the figure below, it can be seen that customer interest is fragmented, according to the fact that there are more than ten different tourism trends. The research results align with the MSR's long-term tourism strategy, which should focus on priorities that need full attention, including setting a unified vision, strategy and marketing activities emphasising sustainable tourism.

Figure 2. Selected trends of tourism in MSR, in (%)



Source: Kajzar, P. et al., (2020)

The results of the research can be summarised in the following identified trends: Kajzar et al. (2020), Kostková et al. (2022)

- Significant seasonality of tourism in MSR, repeated tourist visits from the nearby area several times a year,
- use of the Internet for information and booking services,
- popularity of discount portals,

- Increasing visitor demands for services (quality/price ratio),
- increasing interest in travel-related experiences,
- increase in visitor and guest experiences, event search,
- discovering unique places,
- discovering culture through food and interest in gastronomic tourism,
- in the area of accommodation facilities, customers would like to see wellness services in the first place, modernisation of additional services and more care for the facility's website in the second place, and new fitness, tennis, golf, etc.
- modern trends in the restaurant menu are connected with Raw food and gluten-free kitchens.

## Conclusion

This paper aimed to evaluate selected tourism trends in the Moravian-Silesian Region between 2017 – 2021, when the Covid-19 pandemic began. Based on the above results, it can be concluded that the COVID-19 pandemic mainly influenced tourism trends in 2017-2021. In 2020, there was a decrease in domestic tourists, mainly reflected in the number of foreign guests. 2020 also affected the number of passengers at Leoš Janáček Airport, declining from 323,320 passengers in 2019 to 37,709 in 2020. The main reason for the decrease was the airport closure from 14.3.2020 - 26.5.2020, the start of the summer season only from 1.7.2020 and the reduction of summer destinations to 2. The other area where the COVID-19 pandemic appeared was the number of attendees and proper conferences in MSR when they started to use more online conferences.

Regarding the research conducted in 2017 - 2020 divided into accommodation, catering and travel agencies, the survey showed that the requirements and opinions of customers and business representatives are similar in the MSR. Most surveyed businesses stated that introducing innovations and following modern trends improves public image and interest, increases competitiveness and that introducing new trends and innovations is necessary for success and should be followed and adapted to demand. Therefore, it is necessary to follow trends and customer preferences, and it is also essential to consider something that could not be prepared for, such as a pandemic covid. The pandemic covid has affected tourism not only in the MSR but also worldwide, and it is therefore necessary to react flexibly to unexpected situations.

The solver and his colleagues also focused on selected tourism trends in 2021 and 2022, focusing on selected customers and selected tourism enterprises in the Czech Republic.

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