

# A Mixed Method Approach of Quantitative and Qualitative Design in Analyzing the Trends of the Global Tourism Industry

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## Abstract

This paper aims to analyze the region-wise trends in the global tourism industry for the past 15 years. The study has adopted a mixed approach, and the data from United Nations World Tourism Organization (UNWTO) along with World Bank Open Data from 2005-2021 has been analyzed. The region-wise analysis on four parameters has been done viz., 1) Number of establishments, 2) Average length of stay, 3) Occupancy rate / bed-places (Percent), and 4) International tourist arrivals. The study found that the hotels were not occupied to their full strength, and the number of international tourists dipped, except in the Virgin Islands (U.S), which witnessed a 4.48-time tourist arrival in 2020 compared to 2018. The results also show that the number of establishments globally and the average length of stay have remained almost constant, with few countries showing signs of increased stay over time. The study also finds that global and government intervention and a strategy to develop scenario planning that countries can adopt during uncertainty are required.

**Keywords:** Tourism, international tourist's receipts, Covid-19, accommodation, scenario planning, hospitality, hotels, UNWTO

## Introduction

The Covid-19 pandemic had a negative effect on the tourism industry. The tourism industry is one such industry which is the first to get effected affected and the last one to get revived. The global closure and travel restrictions (Aditi & Sadhale, 2022; Girish, 2021a; Goh, 2021; Wassler & Fan, 2021) starting from March 2020 due to the pandemic paralyzed the growth of the industry (Kim, Seo & Choi, 2021). The effect the pandemic for tourism industry was not only limited to financial crisis, but have also seen many job losses (Choudhary & Manda, 2021; Sneha, 2021; Wassler & Fan, 2021), closure of business establishments, bankruptcy that lead to emotional and psychological imbalances among the tourism professionals. The pandemic fear had seen many cancellations, rescheduling but few of the travelers still wanted to travel and this was termed as “revenge travel” (SAHOO, 2020). As the name

suggests it is a type of revenge towards the pandemic effect. Post lockdown the industry has seen an emergence in the travel world. It was initially due to the business perspective wherein major concern was towards hygiene, sanitization and health. Gradually as the world started a more proactive approach towards travelling, the need to see and visit places and meet their loved ones increased. The borders started to open and travel enthusiasts who earlier were confined to their home got an opportunity to explore. This led to the travel destinations seeing an unprecedented increase in the tourists. The destinations wanted to cover their losses and formed strategies to attract more tourists and on the other hand tourists wanted to have the lost experience of travelling, overcome restless moods and to visit tourist's destination places. This led to an increase in the travel activities and was termed "revenge tourism". Virtual tourism was one of the approaches by various tourism stakeholders to keep connected to the potential tourists (El-Said & Aziz, 2022) during the time of travel restrictions.

## Review of Literature

### Covid-19 and tourism:

The pandemic period has seen few buzzwords but for the study two were adopted for the tourism industry- 1) Virtual tourism 2) Revenge tourism. Virtual tourism was adopted by many tourism agencies to keep in touch with the stakeholders (El-Said & Aziz, 2022; Kinseng, Kartikasari., Aini, Gandi, Dean, 2022). Virtual tourism adopts technological measures to stay connected with the potential tourists. These virtual tourism is hosted usually on cloud based video conferencing software such as Zoom, MS Team, Google Meet etc. Predominantly the MS power point presentation, MS Power BI, are used and Google earth for touring destination (Kinseng et al., 2022). (El-said, 2022) study is focused on the emergence of virtual tourism by the site managers to keep maintaining the interest of the intended visitors. The study found that the experience of a real visit can't be replaced with a virtual tour experience. For revenge tourism or travel there is no published literature which states the evolution of the term 'revenge travel'. The earliest published work was in (Society for the Study of Peace and Conflict (SSPC), n.d.) mentioned in their article published in June 2020 (SAHOO, 2020). (Aditi & Sadhale,

2022) study revealed that one of the most important aspect in the revenge travel was the fatigue aroused due to staying in their homes (Choudhary & Manda, 2021) and business travelers who were confined to their remote working job had a strong urge to experience again the air travel. This also led to many challenges the industry was to face such as continuously changing covid-19 norms, adhering to the government protocols of safety (Sneha, 2021) and hygiene and lastly to recruit trained professionals. (Goh, 2021) in their study on post covid strategy of Sabah- A state in Malaysia found that an integrated approach is required at the destination level. Moreover, the pandemic has created an opportunity to rethink and rework on the strategies towards a responsible sustainable tourism. The decision makers should reform policies to minimize the over dependency on tourism and the communities should be equipped with other livelihoods which can make them ready for any such future uncertainty. (Wassler & Fan, 2021) which had a scenario planning approach and used a survey method in their study for future developments found that it would be a risky business if the revenge tourism is promoted irresponsibly. (Girish, 2021b) studied tourists intention to participate in revenge travel. The study found that policy makers should form strategy to take care of the revenge travelers if the pandemic problem is uncertain. (Choudhary & Manda, 2021) studied the potential threat behind such travel. The study which opted for a survey method found that maximum respondents who travelled was due to the nonrefundable policy of their booked tickets and also the published reports suggests that the destinations has witnessed an unprecedented growth in their tourism activity. (E. E. K. Kim et al., 2021) through the survey method proposed a mechanism named dual-processing to suppress and accelerate the desire to travel. (Wang & Xia, 2021) in their sample survey method through a questionnaire circulated among Amazon Mechanical Turk study which is focused on the factors that is responsible for urge to travel and suggested that travel companies through social media communication can add nostalgic related themes in their branding activities to attract more travelers to go for leisure travel.

### Length of Stay (LOS):

The number of nights spend in a destination is more appropriate for measuring the volume of tourism as compared to the number of visits (Adamiak & Szyda, 2021). The factors which determines the tourist's length of stay in a destination is the nature, culture, activities and things the particular destination provides to the tourists ( Kim, Filimonau & Dickinson, 2021). Baños-Pino, Boto-García, Del Valle & Sustacha, 2021) analyzed the length of stay and the expenditure at the destination for the period 2019 to 2020. The study which was done on the Northern Spanish region found that there was a decrease of 23.8% in the length of stay whereas the per person expenditure remained constant. ( Gössling, Scott, & Hall, 2018) in their study which analyzed the trend in length of stay of 32 destinations and found that over the years for the period of 1995- 2015 the average LOS has decreased by 14.5% whereas alternatively for the individual countries it shows an upward trend. LOS is an important parameter for the revenue generation. The study concluded that strategies to increase the LOS in the destination should be formed. (Nguyen, 2022) in the study found that international tourists have more dominance on the length of stay and tourism receipts and the quality of environmental governance policy by the government influences the LOS.

### **Accommodation:**

(Kaushal & Srivastava, 2020) in their study on challenges for the Indian hospitality sector found that the government has encouraged the minimum stay in the hospitality sector. In the case of virtual tourism during the time of pandemic the users had a positive effect of the hotels virtual experience (El-said, 2022). ( Marques, Guedes, & Bento, 2022) in their study on Portugal found that as compared to the official statistic of occupancy data, the data on the point-of-sale, displays a more volatile behavior and a small annual variation during the pandemic time. ( Jeffrey, Barden, Buckley, & Hubbard, 2002) analyzed the hotel occupancy of the hotels of England. It found that the location of the hotels is an important factor that effects the occupancy performance. But a proper marketing by the individual hotels can improve their performance. Not only the location but a good management policies and practices, appropriately targeted marketing measures are the some of

the factors that is responsible for the occupancy performance. Apart from location if the countries tourism activity is directly proportional to the occupancy performance (Irani, Katircioglu, & Gokmenoglu, , 2021).

### **Tourists Arrivals:**

International tourism receipts is predominantly dependent on the political, and natural factors of the visiting countries ( Yap, Saha, Ndubisi, Alsowaidi, & Saleh, 2022). (Irani et al., 2021) in their study on Financial Performances of the Tourism Firms' found that the foreign tourists arrivals is the most important factor than any other in determining the tourism stock prices. (Adedoyin, Erum, & Bekun, 2021) in their study on tourism dependent countries found that the tourists perception of the country is directly proportional to economic growth. It also effects the international tourist's receipts of the country.

### **Research methodology and study areas:**

In order to study the trend in tourism sectors in the pandemic era and the subsequent possibility for a resilient and sustainable pathway, this research work draws on five designated regions named America, Asia Pacific, Middle East, Africa and Europe. These regions represent different types of destinations globally. The diverse geographical location, will give an in-depth overview of the present status of the tourism industry. It will also give an overview of the regions which are on the way to recovery and which regions will take a little longer time to revival. The study has been done on a mixed method design where qualitative approach has been adopted by using the authors own personal experience, referring to multiple literature published in journals, newspapers, websites of the tourism forums and attending various conferences and discussion forums which was more during the lockdown period. The quantitative data has been taken from the published public sources. The study focusses on the global accommodation trend and the basic indicators is based on the UNWTO data viz., Number of - establishments, bed-places; Occupancy rate / rooms, Occupancy rate / bed-places and Average length of stay.

A total of 223 regions data from the year 1995 is available in the UNWTO data center. The data included few islands also

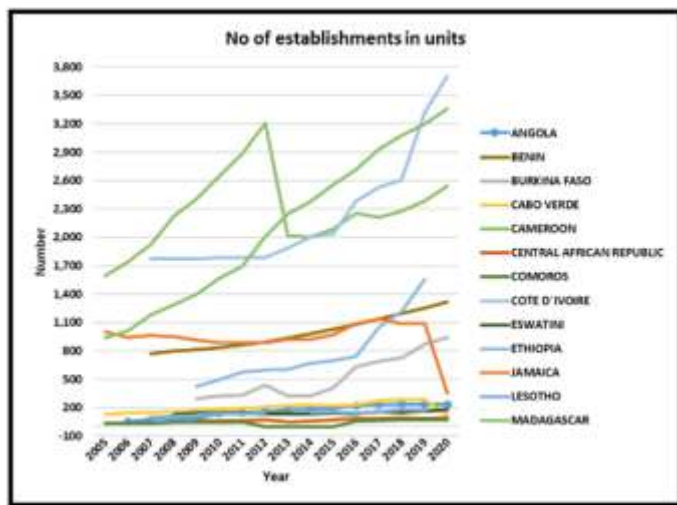
such as Cook Island, Marshall Island etc. After carefully scrutinizing the data, those countries/regions/Islands were excluded, whose data was not completely available. Finally, the data of 135 countries from 2005 which was segregated as per the region has been studied. To study the trend of average length of the stay the data of those countries which is not available for the years 2005, 2018, 2019 and 2020 has been excluded.

## Results

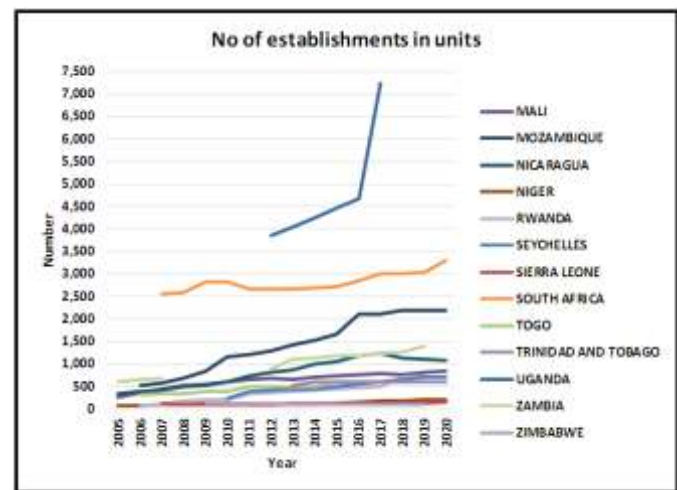
### Number of establishments

**Africa:** A total of 28 countries data was analyzed. To get a clear picture of the trend the countries data has been divided into two charts (chart 1 and 2)

**Chart 1: No. of establishments (Africa)**



**Chart 2: No. of establishments (Africa)**



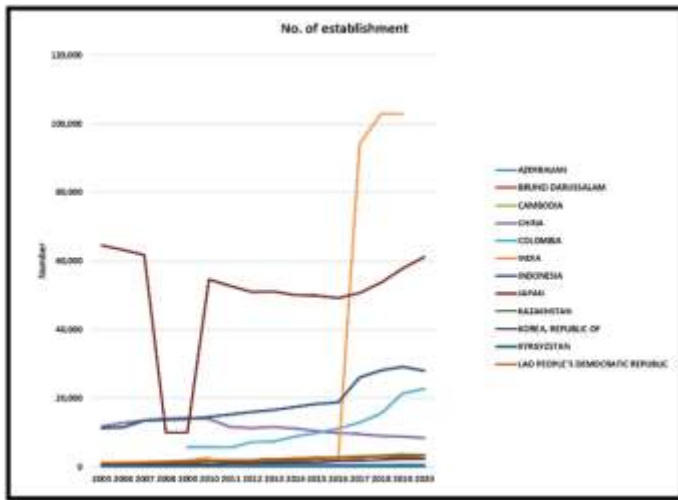
In Chart 1 and 2, Kenya, Gambia, has been excluded because Kenya has no published data for this parameter and Gambia has only for three years. The chart shows that although the international boundaries were closed the number of establishments has seen an upward trend for many of the countries. Zimbabwe, the number remained somewhat same for the last few years where nearly 12 % decrease of the number of establishment from 2009 to 2019 can be seen, whereas for Sierra Leone in 2007 it was 112 and in 2020 it increased to 148. Benin, Burkina Faso, Cameroon, Madagascar, Mozambique, Cote D'Ivoire, Nicaragua, Seychelles, Sierra Leone, South Africa has seen an increase in the establishment in the pandemic period. But Jamaica has seen nearly 70% of the closure of establishments.

### Asia Pacific:

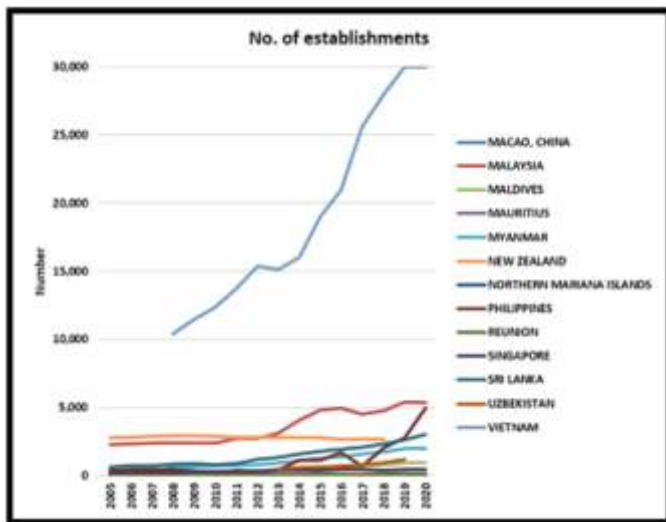
A total of 26 countries data were studied. Out of which Kiribati has been excluded because the data is available for only three years. All the countries count of establishments has somewhat remained constant with 10-20% different from the previous years. In chart 3, in 2008-09, Japan's hospitality industry has seen a dip of nearly 85% during this period but later recovered in 2010 with a rise of nearly 50%. As per the white paper on tourism in Japan published by Ministry of Land, Infrastructure, Transport and Tourism, Japan the government (MLIT, 2009) has prepared and implemented various tourism policies to promote tourist activities in the country for which a law was also enacted in December, 2006 and the cabinet nod was given in June 2007. These government initiatives helped Japan to increase the revenue generation through tourism.

As for India in 2017 the number of registered entities were 1,903 and it went to 94,291 in 2018. This sudden rise is due to the major reforms in the investment policies, cheap price of commodities (Khanna & Jijina, 2017) which helped the hospitality industry to grow.

**Chart 3: No. of establishments (Asia Pacific)**



**Chart 4: No. of establishments (Asia Pacific)**



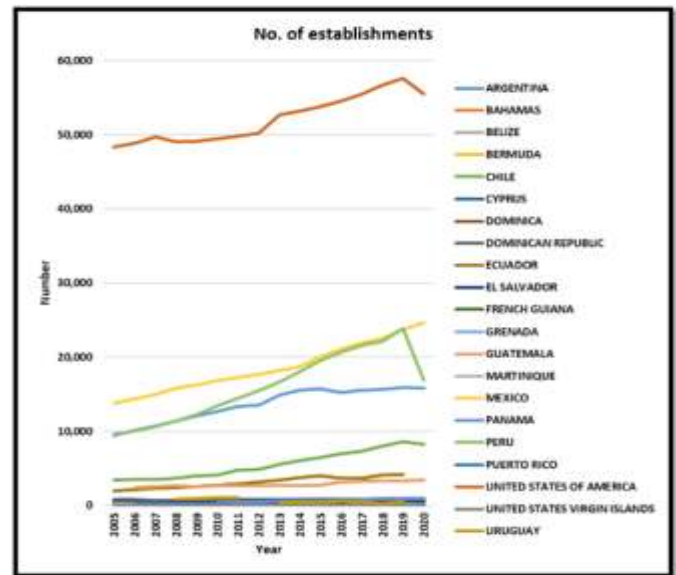
In Chart 4 out of 13 countries Vietnam is having the highest number with 30,000 establishments. This number has remained unchanged for the years 2019 and 2020. Rest all the countries growth trend is somewhat constant or not a much noticeable change, except for the Island- Northern Mariana Islands which has seen nearly 8% decrease in the establishments.

**Americas:**

Out of the 22 regions data published by UNWTO, Cayman Islands have been excluded from the study because the report is available for only five years. In chart 5 only for

Peru there is a decrease of nearly 30% in the number of establishments. Rest of the countries trend has seen somewhat same with a negligible percent of change.

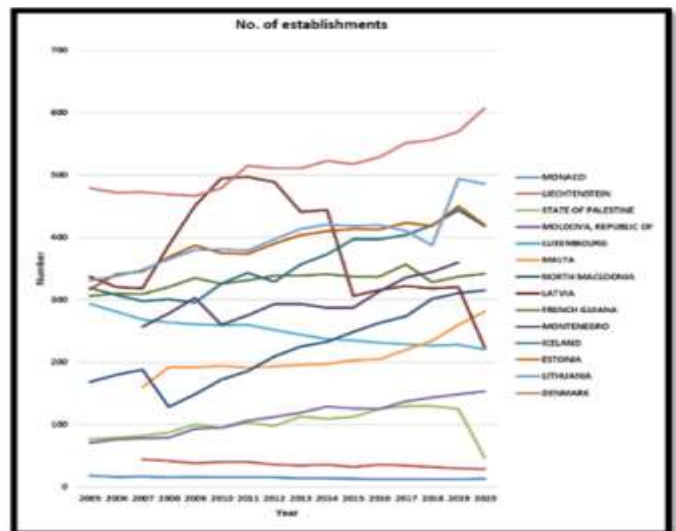
**Chart 5: No. of establishments (America)**



**Europe:**

Out of the 47 countries data, Albania and Ireland has been excluded because of the incomplete published data available in the UNWTO data center. In Chart 6 Slovenia there is nearly 43% rise in the establishment in the year 2018 as compared to 2017. Rest of the countries growth trend has remained somewhat same.

**Chart 6: No. of establishments (Europe)**



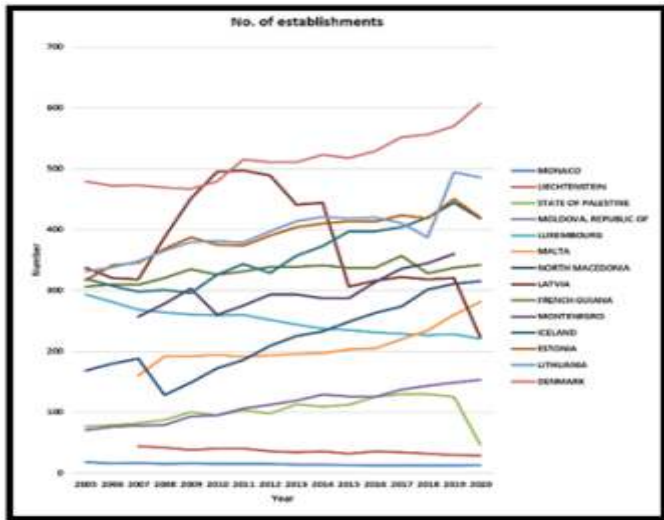
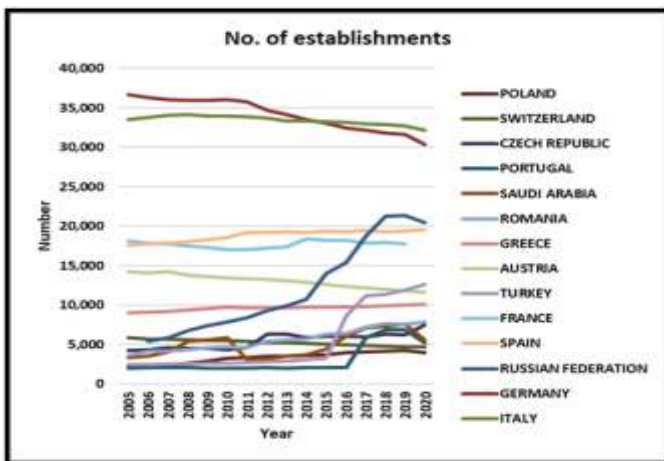
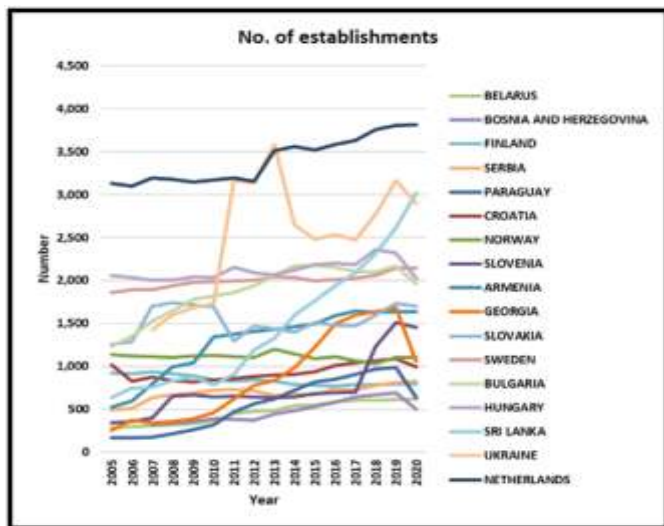


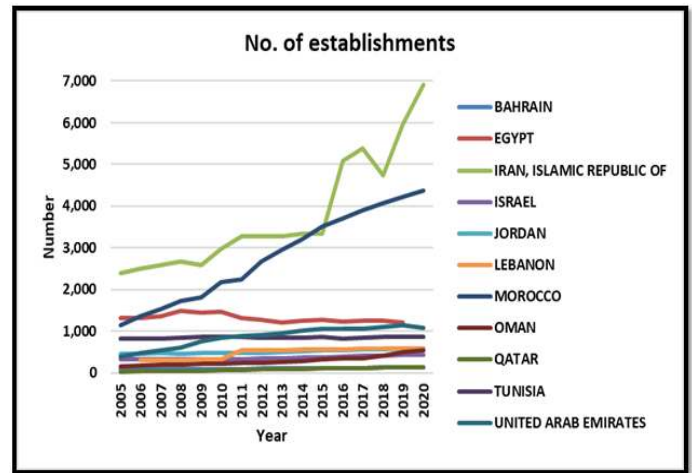
Chart 7 and 8: No. of establishments (Europe)



In Chart 6, 7 and 8 Italy and Germany has the highest number of establishments. Russian Federation has seen a constant growth in the last 15 Years but in 2020 there is nearly 5% decrease in the number. This is being expected as the pandemic gave a blow to the hospitality industry.

**Middle East:**

Chart 9: No. of establishments (Middle East)



In chart 9 Iran has seen nearly 20% rise in the count of the establishments in the year 2020 as compared to 2019. There was 12.21% decrease in the year 2018 as compared to 2017 but in 2019 there is an increase of 25.91% as compared to 2018.

**Average length of stay (LOS) (Nights)**

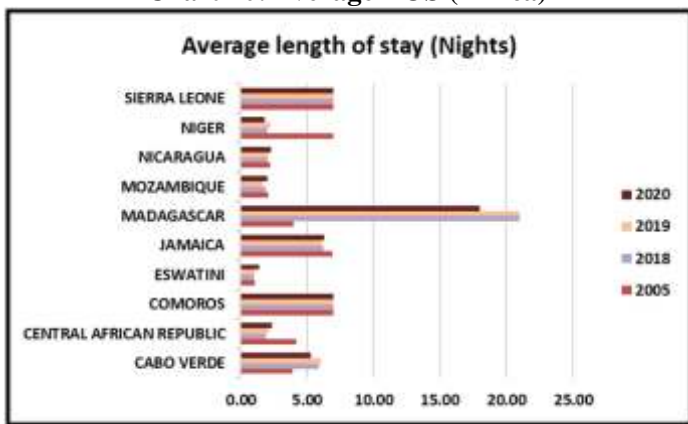
(Gössling et al., 2018) in their study which is focused on length of stay found that there is a decrease in the length of stay globally for the period 1995-2015 but the study for the individual countries shows it is gradually increasing. LOS is an important factor for measuring international tourism (Oklevik, Kwiatkowski, Malchrowicz-Mo ko, Ossowska, & Janiszewska, 2021). LOS is important for the tourism industry as it effects the spending activity of the tourists which in turn affects the transport, accommodation, tourist's spots, and even local shop keepers and souvenir owners too. It is vital as it contributes for the revenue generation of the destination.

Out of the 137 countries, 55 countries have not shared the data for 2020 and those countries whose data was available for the year 2005, 2018, 2019 and 2020 were analyzed. A total of 65 countries data could be analyzed. The rationale

behind choosing these years was to look into the trend during the pre and post pandemic period where there is government relaxation in the movement. Out of the 137 countries data. By analyzing the data for the past 15 years, the average length of stay has remained same with a minor difference from the previous years.

**Africa**

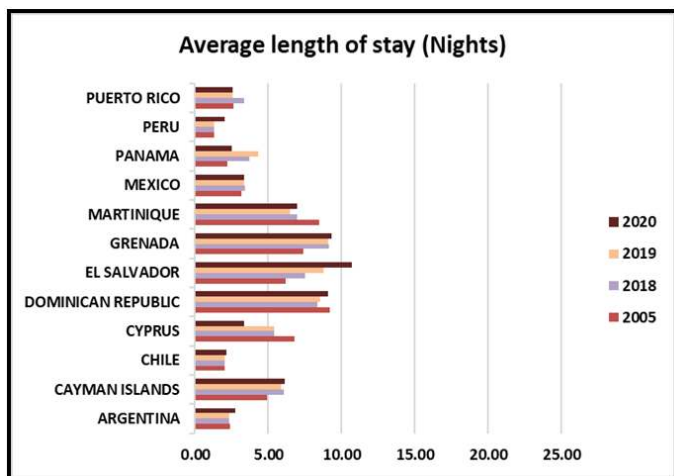
**Chart 10: Average LOS (Africa)**



Out of the 21 countries data, 10 countries data has been taken for the study. The data shows Madagascar has the highest number in terms of length of the stay. It has increased 5.25 times from 2005 to 2018. It remained same in the year 2019 but decreased by 14.28 % for the year 2020. Rest all the countries is somewhat remained constant for the years 2018, 2019 and 2020.

**America**

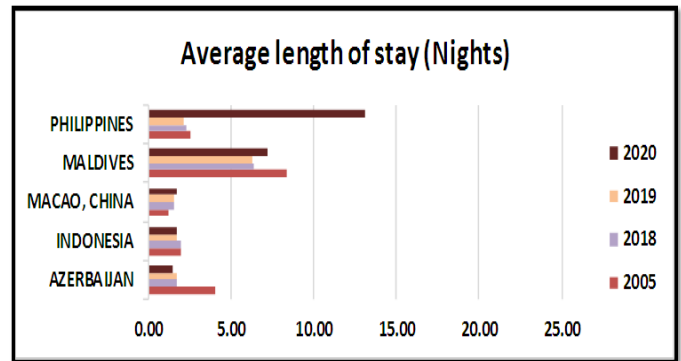
**Chart 11: Average LOS (Africa)**



Dominican Republic and El Salvador has seen a constant increase in the length of the stay even in the pandemic period. In case of Cyprus the average length of stay is decreasing as compared to 2005. Rest of the region's trend has somewhat remained same with a negligible difference.

**Asia Pacific**

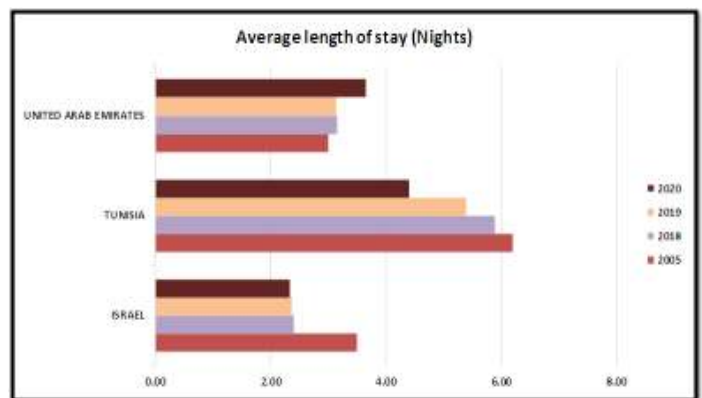
**Chart 12: Average LOS (Asia Pacific)**



The average LOS in Philippines has seen a ten times increase in 2020 as compared to 2019. As per the reports published by PwC Philippine (Impact of COVID-19 on the Philippine Tourism Industry, n.d.) states that a stimulus package of PHP1.3 trillion will be released for the tourism industry for a period of 4 years. The Philippines government has implemented many strategic initiatives (PPPs Play Significant Role in PH Tourism Development Program, n.d.; Sardar, 2022; Yamagishi, Gantalao, & Ocampo, 2021) which can be one of the reason that the tourism industry is seen in a recovery stage. Azerbaijan has seen a decrease in the LOS from 2005.

**Middle East**

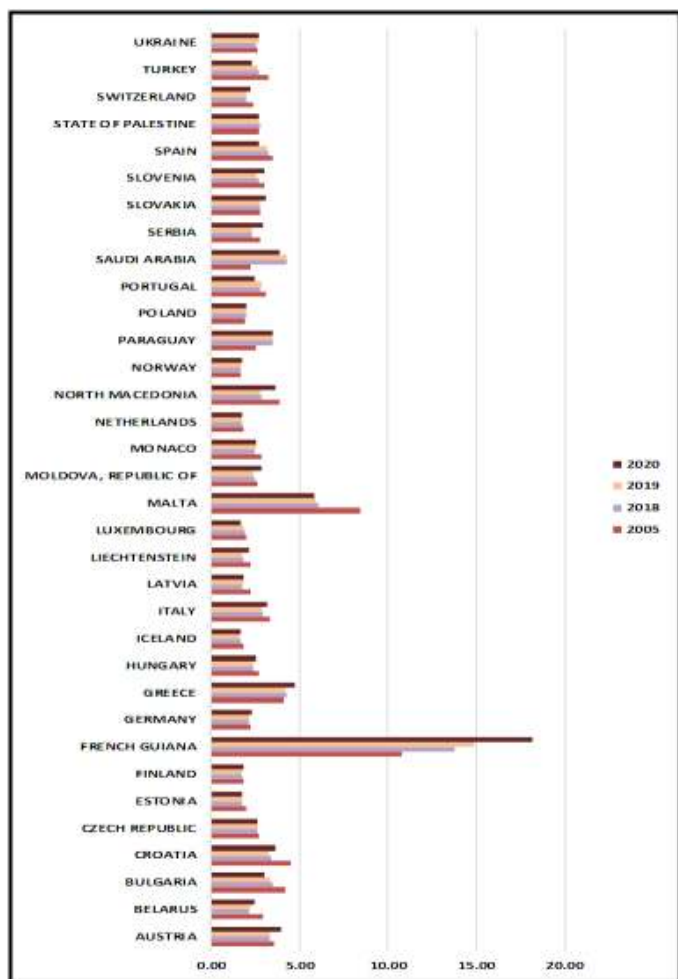
**Chart 13: Average LOS (Middle East)**



Israel has nearly 50% decrease in the LOS in 2018 as compared to 2005. The country can leverage the year 2018. UAE LOS has gradually increased over 15 years' time.

**Europe**

**Chart 14: Average LOS (Europe)**



French Guiana has seen an upward trend in the average LOS. The same trend is visible in the pandemic year also. In 2018 it was 13.80 which increased to 14.90 in 2019 and to 18.20 in 2020. Malta has seen a dip in average LOS, which was 8.40 in 2005, which later decreased to 6.10 in 2018 and 5.80 in the year 2020.

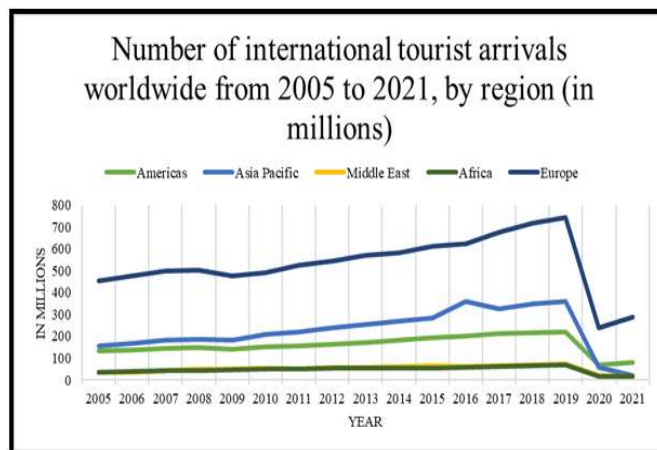
**Occupancy rate / bed-places (Percent)**

Out of the 137 countries data, 67 countries have not shared the data for 2020 and for the year 2019, 56 countries have not shared their data. The occupancy rate has dropped

significantly from 2019 to 2020. On an average 5-75% drop can be seen for 70 countries in the occupancy rates.

**Tourists Receipts**

**Chart 15: International tourist arrivals. Source: International tourist arrivals by region | Statista**



Region wise international tourist's arrivals have significantly dropped during the pandemic period particularly for the Asia Pacific and America. Data of all the countries shows a drop in the tourist's arrivals with an exception of Virgin Islands (U.S.) that has a totally different trend which is an upward growth of nearly 1,922,000 visitors in 2018 which went to 2,074,000 in 2019 and 8,612,000 in 2020. (Adedoyin, Seetaram, Disegna, & Filis, 2021) studied tourism tax influence on the international tourists flow and found that an increase in 10% tax decreases the tourism demand by 5.4%. The study which is focused on Maldives that is a tourism dependent economy shows that for few source markets the increase in tax structure has not affected much the trend of visiting this country. Further the authors suggest that by adopting different tax structures for different tourism source markets can keep the number of international tourists receipts constant.

**General Discussion, Suggestion and Conclusions**

Although the international tourist's arrivals have seen a fall for the last two years, but the effect on the number of establishments and the average length of stay is minimum.



In fact, in few countries the average LOS has seen a growth, even when the international boundaries were not open. This can be due to the opening of domestic boundaries and persons who were stuck in their houses for such a long period got an opportunity to visit the domestic places (Adamiak & Szyda, 2021) which shows a dominance of the local tourists. The safety, hygiene and sanitization (Saxena, Kumar, & Kumar, 2021; Wang & Xia, 2021) were the major concern during the post pandemic travel period. The results show that there is strong urge of travel among tourists. Occupancy rate has dropped to a considerable rate, but there is little difference in the number of establishments and average length of stay. The tourism industry is expected to grow significantly in the coming months if situation normalizes. In addition, the study also reveals that there are new establishments in the hospitality sector even during pandemic period. The lower occupancy rate reveals that there is a loss of revenue but on the other hand the opening of new establishments shows that the industry is ready to accommodate travelers. The industry can also adopt for a flexible tax regime (Adedoyin, Seetaram, et al., 2021) to attract tourists and increase international tourists arrivals. Below are few suggestions to bring the tourism and hospitality industry back to its lost glory:

### **Global initiatives:**

The global international bodies, organizations, councils should work jointly and strategize the policies to uplift this ailing industry. International travel requirement should be eased. Countries should wisely formulate plans to attract international tourists. The first step towards this would be to simplify the VISA application process and to sign MOU (Memorandum of Understanding) with other countries for VISA waiver agreements. This will in turn increase the foreign exchange earning of the country. The airlines are facing hard time in terms of the operational cost. The parking charges for the long haul flights can be kept minimal. The fuel cost can also be kept bare minimum. IATA (International Air Transport Association) founded in 1945 is an association of world's airlines. The IATA accredited travel agents are facing a tough time too. The Association should wave of the zero commission policy to the IATA travel agents and introduce the rolled back

commission structure. Its high time now that IATA should consider the "Billing and Settlement Period" from weekly to 15 days which was in practice few years back. This will give the travel agents a rolling period. UNWTO has come up with an innovative program to educate the tourism professionals (Acceleration Programmes, n.d.). Within this program UNWTO along with Google has initiated country specific program focusing on digital skilling of tourism professionals and data insights for a sustainable tourism recovery. Such type of more initiative at a global level is required.

### **Government support:**

Tourism industry is one such industry which provides employment to a large population of the world. Local transport service provider, souvenir shop owners, travel agents, tour operators, tour guides, hotel and motel staff are all depended on this industry. It will be impossible for the industry to recover until the government extends its support. The pandemic has effected all the stakeholders of the tourism industry. The government should provide financial help in the form of easing the interest on loans or interest free loan for a fixed period, contributing towards the salary of the tourism professionals, promotion of culture and destination in the international market, opening doors for international tourists, and developing tourism sites as per the global standards. The government in a step to promote local traders can frame a policy which can restrain the airlines to consider Business to Business model in place of Business to Customer. (Adamiak & Szyda, 2021) in their study found that the domestic tourism will recover rapidly as compared to international tourism post pandemic. So the local tourism development should be on priority to target the domestic tourists and not only the international tourists. This is relevant particularly for the countries which are middle income. In view of the global sustainable challenges the government can also encourage ground transportation for shorter routes. The government should adopt a sustainable approach of tourism development (Nguyen, 2022) along with environment governance policy and protection. Further the study found that the domestic tourists should be educated with the importance of sustainable growth of tourism and the environmental

issues. Hygiene, and sanitization (Kaushal & Srivastava, 2020) are the major concern for the industry. The government can frame policies and simultaneously educate the locals of its importance. It happens over a period people tend to be negligent in their behavior for the aspect related to hygiene and sanitization. Regular monitoring and educating the people on this aspect will be the biggest challenge for the government. A timely intervention from the government is required else the tourism industry will lose some of its most efficient professionals.

### **Scenario planning model:**

The example of Scotland tourism can be referred by other countries to develop this model (Scotland Tourism, n.d.). They have outlined scenarios for the coming 18 to 24 months. The Scotland Tourism Board adopted the scenario planning model for the transport sector. (Page, Yeoman, Connell, & Greenwood, 2010). Earlier also many studies related to scenario planning concepts for tourism have been done to analyse the uncertainty and to forecast future (Moreira & Santos, 2020; Nyaupane & Buzinde, 2017; Page et al., 2010). Claudete Oliveira Moreira; Norberto Santos in their study found that the stakeholders' knowledge and involvement can help the planning and management of tourist sites. Stephen John Page, Ian Yeoman, Joanne Connell, and Chris Greenwood studied the scenario planning exercise done by VisitScotland (National Tourism Organization of Scotland) to study the future of the transport sector by 2025. Globally, VisitScotland wanted to become one of the best tourism organizations, and for which they designed and developed a scenario planning model which took care of the environment and future economic feasibility (Page et al., 2010; Yeoman & McMahon-Beattie, 2005). Scenario planning model can help the tourism industry to sustain and overcome any future calamity and uncertainty (Postma & Yeoman, 2020). (Gössling & Scott, 2012) examined scenario planning correlation with sustainable tourism. The study found that it is extremely important for a sustainable growth in tourism to develop tools which can help to forecast and respond effectively to any global crisis. This can provide insights for policy makers, marketers and tourism professionals to

make strategic decisions. (Pizzitutti et al., 2017) did research on the growing population of Galapagos island and presented a scenario planning tool to forecast the implications of tourism flows and the arrival of immigrants who had travelled to this tourist sites in search of a better livelihood and opportunity.

The industry will grow tremendously in the coming years if the situation normalizes. But the major concern will be health, sanitization and hygiene factors. The tourists as well as the tourism agencies should be educated with the importance of these factors. The global organizations and local government should work jointly to make the tourism accessible.

### **Limitations and Suggestions for Future Research:**

The study provides various possibilities for future research work. Firstly, research primarily focused on the region wise global trends in the hospitality sector viz., the average LOS, number of establishments (which increased during the lockdown period), occupancy performance (which seems constant) and the movement of the international tourists. Since the data has been taken from UNWTO (Adamiak & Szyda, 2021) which provides country wise data only so future research can focus on country specific trends which will provide an insight on the factors responsible for the trend. Secondly, a survey method along with the personal interview with the officials of destination management organization can be adopted. Thirdly, further research can be built on this results with a focus towards IATA Traffic Conference Area (TC). There has been fewer research in which the market segment is chosen as per the TC and that too specifically for length of stay and occupancy performance. Finally, research work can be done independently to study each parameter separately viz., LOS, number of establishments or occupancy rate. For occupancy and LOS survey method can also be adopted to give an in depth insight of the preference or choices done by the visitors during their stay. In addition, the future research can also aim at authenticating the findings of this paper by using the country specific data.

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