Strategic Adaptation During the COVID-19 Pandemic:

BEST PRACTICES FROM THE TOURISM & HOSPITALITY INDUSTRY

UofSC

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Research team

Dr. Simon Hudson
Dr. Robin DiPietro
Dr. Drew Martin
Dr. Jing Li
Xiao (Forest) Ma
Swechchha Subedi

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1. Executive summary

This study explores how the tourism and hospitality sector has adapted during the COVID-19 pandemic. Specifically, what types of strategic adaptation did the industry employ? Strategic adaptation concerns specific ways that an organization adjusts to survive and capitalize on external circumstances. As the business environment is complex and dynamic, adaptation was measured in four stages. Initially, the researchers started globally by seeking examples of best practices of strategic adaptation from around the world. Then, turning their attention locally, the team conducted in-depth interviews with key industry stakeholders in South Carolina to gain regional industry perspectives on how organizations adapted in response to the pandemic. Next, an online survey targeted tourism and hospitality executives in South Carolina, questioning them about strategic adaptation in response to COVID-19. For the final research stage, an online panel survey of US travelers sought to understand how the pandemic has changed their travel behaviors.

How have destinations and individual organizations adapted worldwide? The results show hospitality and tourism providers have adapted in six key ways: creating new products and services, refocusing target markets, redesigning communication strategies, formulating new financial models, adapting to new technology, and developing their human resource management strategies. Common examples of these adaptations included pivoting to focus on domestic tourists, implementing health and safety protocols, using social media to communicate with both staff and customers, investing in technology and innovation, and retraining employees to prepare them for new post-pandemic norms.

In-depth interviews of practitioners confirm these findings. Most stakeholders report that their organizations pivoted and adapted quickly to the pandemic. A proactive stance led to developing and implementing new cleaning protocols that protected both staff and customers, and utilizing social media to remain in constant communication with their customers and employees. In general, they implemented creative ways to bring in more business, and in addition support from the government and industry associations helped to navigate through the pandemic. As businesses reopened, demand increased; however, employee shortages have adversely affected operations to the current day.

Results of the executive survey show that respondents generally rate their organization's adaptation performance during the pandemic as high. Adaptations were more likely for communications and new technology than financial models or targeting new markets. As found in the interviews, support from government and industry associations was critical in helping organizations survive the pandemic. Most executives agree that the pandemic sped up innovations, with the majority introducing 'low-touch' digital technologies. The main service or product adaptations relate to new hygiene protocols. To decrease operational costs at the start of the pandemic, many organizations had to lay off or furlough their employees. As customer demand started to return, respondents reported difficulty recruiting staff with the necessary skills for the 'new normal' such as customer service, adaptability, and flexibility. Moving forward, strategies to operate post-pandemic include focusing on health and safety, resilience, and employee recruitment and training.

How does the pandemic affect travel? The survey of American consumers shows that travelers are more cautious than before. Post-pandemic, consumers report a top priority will be public health conditions and hygiene standards at destinations, hotels, and attractions. Today's travelers are avoiding large cities and congested areas, preferring to drive to destinations rather than fly, and choosing destinations where social distancing is easy. In the future they are more likely to travel with their families, and travel to familiar destinations. Respondents say they are less likely to take cruises, go on religious/spiritual vacations, organized tours, or attend special events. Most respondents believe that the pandemic has increased hospitality and travel costs, and they are reluctant to pay more for travel. They also feel that service quality overall has declined. Regarding new technologies adopted during the pandemic, respondents are not against using technology if service costs decrease or the result is a quicker service delivery. About one-half of the travelers surveyed will not consider international travel in the foreseeable future. Those respondents who are willing to venture abroad seem to be more resilient and are less anxious about traveling in general; however, they will choose destinations based on how these destinations have handled the pandemic.

Based on the findings, a number of recommendations are made for organizations in the tourism and hospitality sector. Firstly, because consumer demands and behavior have been altered by the pandemic, organizations will need to adapt if they have not already. Specifically, they will have to embrace technological changes in order to prosper, and the public health conditions and hygiene standards need to become a top priority. Becoming customer-centered and exceeding customer expectations are also critical for long-term business success. Finally, recruiting talent and addressing skills shortages in the tourism and hospitality sector will be crucial post-pandemic. Interest in working in the industry has already been impacted due to job security fears - with redundancies and high-profile job losses reported throughout the pandemic. This shift poses a serious problem for recovery of this sector, as expertise and knowledge are needed more than ever to cope with the post-pandemic world.

2. Introduction

The tourism industry was devastated by the COVID-19 pandemic. Worldwide, tourism suffered its worst year on record in 2020, with international arrivals dropping by 74% according to data from the World Tourism Organization (UNWTO, 2020a). This decline translated to one billion fewer international arrivals than in the previous year. The first half of 2021 showed little improvement. Although South Carolina is not as reliant on international tourists as many other destinations, the state was certainly vulnerable to the crisis. The hospitality industry traditionally employs 10% of the state's workforce, or about 220,000 people. In 2019, South Carolina's leisure and hospitality jobs increased

twice the national rate, and the Palmetto State's historically low unemployment rates meant hotels and restaurants struggled to keep their businesses fully staffed. The hospitality and tourism sector's rapid growth was followed by an equally rapid employment contraction due to the pandemic. South Carolina's hotel industry alone lost over 50,000 total jobs (including supporting positions) as a result of the pandemic (Williams, 2020).

This crisis is not the first one to hit South Carolina over the last decade. The floods of 2015 inflicted about $12 billion in damage on the state, putting the two-day storm's impact on the same magnitude of Hurricane Hugo in 1989. In 2017, Hurricane Irma, the most powerful Atlantic hurricane in recorded history, raked across South Carolina, causing the state's biggest job loss in six years.

Unfortunately for the tourism and hospitality industry, few studies and theoretical models give guidance for responding to a crisis (Gertner & Kotler, 2004; Hudson, 2016). A small, but growing body of research in crisis and disaster management has been accumulating in the tourism and hospitality industry (Ritchie, 2004), but this research stream is typically overlooked in comparison to issues promoting 'success' (Santana, 2003). As natural disasters are inevitable, they must therefore be managed (Evans & Elphick, 2005; Fall, 2004; Henderson, 2003). Surprisingly, tourism-related organizations often do not have a crisis recovery plan (Barton, 1994).

This study's objective was to develop the theory on crisis management, whilst providing guidance to assist the South Carolina tourism industry's recovery from the impacts of COVID-19. The focus was on strategic adaptation. Adaptation has been labeled the new competitive advantage by Reeves and Deimler (2011), and is particularly relevant during a crisis (Girneata, 2014). Strategic adaptation concerns specific ways that an organization adjusts - seeking to survive and capitalize on external circumstances. Such adjustments occur in a variety of product, market, and resource management areas. Examples could include reliance on a broader product mix, efforts devoted to new product development, exploration of new markets and market segments, speed of response to market developments, outsourcing and resource leveraging, changes in facilities or locations, formation of strategic alliances, and experimentation with new sales, service and distribution methods (Schindehutte & Morris, 2001).

3. Methodology

The strategic adaptation level in the tourism and hospitality industry in terms of responding to the pandemic (labeled 'COVID-aptability' by Hudson in 2020) was measured in four stages. First, the researchers started globally by seeking examples of best global practices of strategic adaptation. Then, turning their attention locally, the team conducted in-depth interviews (15) with key industry stakeholders in South Carolina to gain regional industry perspectives on how organizations adapted in response to the pandemic.

Following the qualitative data collection, an online survey was launched targeting a sample of executives and marketers in key sectors of the tourism and hospitality industry in South Carolina (i.e., hotels, destinations, and restaurants). Drawing on the literature (e.g., Schindehutte & Morris, 2001; Rootman & Kruger, 2010), and the findings from the qualitative research, survey questions probed stakeholders about strategic adaptation in response to COVID-19. A total of 525 respondents completed the survey.

In the final research stage, an online panel survey of US travelers explored consumer opinions relating to new adaptations introduced during the pandemic by the tourism and hospitality sector. Travelers were also questioned about their propensity to travel once the crisis was over, their constraints to travel, and the communications strategies that they were most likely to respond to. Scales were developed based on the literature (e.g., Miao et al., 2021; Pan et al., 2021; Zheng et al., 2021). A total of 510 consumers completed the survey.

4. Global best practices in strategic adaptation in the tourism and hospitality sector

The objective of this part of the project was to identify global best practices in strategic adaptation in the tourism and hospitality sector. To collect this information, secondary data was reviewed from various sources including media articles, industry and government reports, campaign materials, websites and social media channels. Next, interviews were conducted with stakeholders worldwide to gain more holistic perspectives of each destination. Participants included destination marketers, government officials, tour operators, professional guides, and hotel managers. Due to travel restrictions during the pandemic, interviews were conducted remotely via Zoom, email, or telephone. A semi-structured guide was employed to encourage discussion, with questions based on the different types of strategic adaptation referred to in the literature. Figure 1 summarizes the findings.

Figure 1. How the tourism and hospitality industry worldwide adapted to the COVID-19 pandemic

TYPE OF STRATEGIC ADAPTATION	BEST EXAMPLES OF STRATEGIC ADAPTATION FROM THE TOURISM AND HOSPITALITY INDUSTRY
1. Adapting products and services	**Operational changes to meet new health regulations** – eg. Bucuti & Tara Beach Resort in Aruba **Adapting facilities/products to meet new demands** – eg. Montage Hotels in the US transformed meeting spaces into educational rooms for children **Adapting service to provide support to those in need** – eg. 'caremongering' in Canada and Spain **Adapting to trends** - Japan hotels responding to demand for 'workations'; Cambodia capitalizing on demand for adventure tourism; casinos in US allowing gambling on e-sports; Ghost Kitchens in the US
2. Adapting to new markets	**Adapting to domestic tourists** – many countries pivoted to attract locals including Vietnam, Australia, Canada, India, Indonesia, Japan, Malaysia, Laos, New Zealand, Philippines, Thailand, and Sri Lanka **Adapting services for new markets** - Dubai providing Kosher foods in hotels; Maldives catering for Indians instead of Chinese **Targeting long-stay visitors/digital nomads** – Costa Rica, Dubai, Cambodia, Portugal, Barbados; Hawaii *Movers and Shakas* **Travel bubbles/zones** – Australia & New Zealand; Singapore and Hong Kong **Other** – EmiControls disinfection tunnels; Doorstep Productions in the UK; Qantas selling bar carts that in-flight drinks were served from
3. Adapting communications	**External** - Tourism Australia (changed tactics), Dubai (we are open), New Zealand (place branding), Aruba (social media), Costa Rica Vamos a Turistear ("Let's go touring"); Dekho Apna Desh in India; Thomas Cook 'India Holiday Festival'; Japan 'Go To Travel' targeting domestic packages; Laos 'Let's Travel' expos; Malaysia #TravelLater **Internal -** New Zealand, Australia, Sri Lanka **Reassuring tourists** - ATA 'Happily Ever After Guarantee'; "Clean and Safe Malaysia" campaign; Philippines paying 50% of costs of tests
4. Adapting financial models	**Alternative revenue streams –** eg. Finnair selling their airline food in supermarkets; Asia One Resort Supply in Laos shifted from selling kitchen equip-ment to selling tents **Government support for tourism sector examples** – India, Indonesia, Costa Rica, Iran, Italy, Japan, Laos, Malaysia, Maldives, New Zealand, Portugal, Thailand; UK; US; Cambodia provided tax exemptions to businesses in the tourism sector
5. Adapting to new technology	**Online educational programs** – eg. Japan National Tourism Organization (JNTO) launched a 'Meet Japan' educational program online **Upgrading online entry procedures** – eg. Bhutan upgrading online booking platforms to **Virtual social gatherings** - Entrepreneurs in Japan created a virtual bar service to replace the Japanese izakaya **Engaging consumers via virtual reality** – UK, Singapore, Mexico, Maldives and Sri Lanka **Providing contactless services using technology** – eg. Huazhu in China; 'My Club Med App'; Anantara app in the Maldives **Shifting marketing focus to emerging social platforms like livestream and short video** – eg. China **Implementing technology for new health and safety protocols** – eg. Hotel in New York - electronic thermometer at the front door & robot that helped sterilize bedrooms **Virtual conference platforms** – eg. Hospitality Tomorrow
6. Adapting Human Resource Management strategies	**Training and up-skilling** – Laos, Trafalgar's Wellness Directors, UK Small Business Leadership Program, Tourism Australia monthly webinars; India study; Indonesia training; Laos - Luxembourg Development Cooperation Agency's Skills for Tourism; Anantara Veli Resort employed a 'Guest Guard-ian'; IMCT launched COVID-awareness training for 100 micro and small tourism and hospitality businesses; Philippines DOT staged various educational webinars focused on innovation, entrepreneurship, culture and heritage, sanitation and hygiene, and e-commerce, among others; Portugal had online training; The Small Business Leadership Program in the UK; Sri Lanka webinars **Employee schemes** – Qantas took advantage of Australia's JobKeepers program; Tourism Council of Bhutan; Cambodia; Ruth Franklin, Co-founder of Secret Paradise Maldives; group of hotels in Costa Rica; Portugal layoff scheme; South Africa UIF scheme; UK Coronavirus Job Retention scheme

4.1 Adapting products or services

Early in the pandemic, many organizations pivoted successfully, adapting products and services. Examples include restaurants focusing on takeout and delivery, commercial airlines flying critical medical supplies and other cargo around the world, and hotels offering people a facility to self-isolate and protect their families. However, as travel restrictions eased, the industry had to consider how they could adapt to the next stage of the pandemic – one characterized by an emphasis on health and safety, technology, lower revenues, and a low-touch economy. Businesses had to make operational changes to meet new health regulations.

For example, at the Bucuti & Tara Beach Resort in Aruba, owner Ewald Biemans was quick to adapt to the pandemic, introducing new procedures, policies, and protocols to protect the safety of guests and staff. All hotel rooms were equipped with HEPA air filtration systems along with dehumidifiers for the purist air. Upon cleaning with EPA-approved peroxide products, Bucuti & Tara added sanitizing with a high-tech ionizer followed by a UVC germicidal lamp treatment. The result was a room as clean as a hospital operating room.

Every Bucuti & Tara employee was tested for COVID-19, and thereafter given a daily temperature and health screening. Check-in for guests became touchless, and rooms were sealed with a sticker after being sterilized. Hotel information was provided via in-room videos and on a personal iPad included in every accommodation. These iPads could be brought to the restaurant to place an order at the table, or guests could use their own mobile device and pull up menus from a QR code reader. Using Electrostatic guns, public areas were disinfected with safe, sustainable, non-toxic cleaning agents, and social distancing measures were implemented throughout the hotel. Bucuti & Tara also set up a testing facility where guests could have a test taken and have results delivered to their email the same day. The Doctor and Lab performing the tests was certified by the Aruban Health Department, and the PCR tests were accepted by US authorities upon re-entry of American guests.

Others adapted facilities to meet new demands. Montage Hotels in the US, for example, transformed meeting spaces at each of their properties and launched the Montage Academy, a back-to-school package that came with access to a ‘study hall’ and round-the-clock virtual tutoring. The program was created to attract families during the pandemic. Others created ‘ghost kitchens’, places where restaurants or people producing food could make their product to distribute or sell at satellite locations. More than 1,500 ghost kitchens operated in the US by January 2021.

Thai Airways was very creative, launching special flights that flew over 99 holy sites in Thailand, building on the ‘flights to nowhere’ craze. The airline also found new sources of income in an airline-themed café, selling handbags made from airline life vests, and expanding street sales of their popular dough fritters. In London, with all the famous theatres closed, two entrepreneurs created a service called ‘Doorstep Productions’ that brought a slice of the West End to the public.

Finally, a number of tourism organizations adapted services to provide support to those in need. In Canada, the word ‘caremongering’ was used to describe efforts to help vulnerable populations during the pandemic. Two tourism entrepreneurs in Spain formalized such altruism by launching a campaign to assist both the travel sector and essential workers at the same time. Ian Rutter and Andrew Watson, owners of B&B Casa Higueras in Andalucia Spain, created #MyTravelPledge, an online platform that offered free vacations to healthcare workers once the pandemic had subsided. Accommodation providers around the world were invited to join the movement and give back to frontline workers. Another good example of this ‘caremongering’ came from the Canary Islands, where hotel company Holiday Club offered free accommodation to the growing number of migrant arrivals who fell outside the scope of the official migrant reception and integration system.

4.2 Adapting to new markets

With borders closed, many tourism destinations adapted to focus on attracting domestic tourists. Hotels in Vietnam and the Philippines, for example, re-invented themselves (and reduce prices) to attract the domestic market. India’s Ministry of Tourism (MoT) put all its efforts behind a domestic tourism campaign “Dekho Apna Desh,” and the Japanese government launched a domestic travel promotion campaign called ‘Go To Travel.’ Efforts to promote domestic tourism met with varying degrees of success. Destinations like Phuket in Thailand and Boracay in the Philippines found difficulty catering only to domestic travelers, whereas Tourism Australia’s ‘Holiday Here This Year’ campaign was a resounding success.

In Japan and Singapore, accommodation providers took advantage of the demand for ‘workations’ by providing rooms for local employees who wanted to combine work and leisure. In Cambodia and Laos, tour operators responded to the increased domestic demand for adventure tourism and camping. Seeing a new opportunity emerge, a UK ferry operator adapted his sightseeing tours to focus on cruise ships anchored during the pandemic off England’s south coast. The ‘ghost ships’ fascinated locals and became a tourist attraction in their own right, with people paying to see them up close.

Other destinations adapted to welcome newly emerging international markets. For example, Dubai’s tourism industry adapted services catering to a growing number of new tourists and business-oriented visitors from Israel. Hotels began offering kosher meals, and hundreds of tour guides enrolled in Hebrew language courses. Hoteliers in the Maldives shifted to Indians tourists who, during the crisis, took over from China as their top international source of tourists. Finally, in an effort to attract international golf tourists during the pandemic, Thailand included six golf resorts under the program called ‘Safe and Sealed’, whereby international visitors could come to the country for two weeks but would not be allowed to travel elsewhere, in effect turning the resorts into manageable ‘quarantine’ areas.


Photo by Victor He on Unsplash

With the absence of tourists during the pandemic, many destinations diversified by targeting long-stay digital nomads to replace tourists. Barbados was one of the first destinations to launch a year-long work visa during the crisis. The visa, or '12-month Barbados Welcome Stamp,' was established on 30 June 2020, and by September more than 1,350 applications had been submitted. Dubai followed suit in October 2020 by offering its own one-year virtual working program. Then early in 2021, Costa Rica launched a digital nomad visa, called the Rentista, allowing visitors to work legally in the country for two years, as long as they did so remotely and independently. Workers would have to provide private health insurance coverage for themselves and family members for the duration of their stay, but they would not be required to pay Costa Rica income tax or make contributions to the country's social security program.

Perhaps the most creative program of this nature was Hawaii's. The pandemic affected the state's $18 billion tourism industry more than any other state. In an effort to diversify the economy, Hawaii launched a unique relocation program at the end of 2020 called *Movers and Shakas*. The new temporary residency program was formed by a group of local nonprofits, alumni associations, and business leaders in partnership with the state government. The initiative aimed to attract working professionals from around the US to work remotely from Hawaii, contributing to the local economy and getting involved in community-building efforts severely impacted by the coronavirus pandemic. The 50 members of the first *Movers and Shakas* cohort were chosen in February 2021 from an application process that drew 90,000 applicants.

In a similar vein, other countries during the pandemic recognized the importance of moving beyond destination marketing to embrace the concept of place branding - branding themselves not just to attract tourists, but to bring in investments and woo talented foreign workers. Compared to destination marketing, place branding requires a broad set of efforts made by governments and multiple stakeholders such as local residents and more industry disciplines and businesses. New Zealand is a good example, launching a global campaign called 'Messages from New Zealand' to build preference and desire for New Zealand overseas, and help drive economic recovery when borders reopened. The partnership with New Zealand Trade and Enterprise, Ministry for Primary Industries, and Education New Zealand was designed to build New Zealand's reputation offshore as a great place to live, study in, buy products from, invest in and visit again when the time was right.

Other destinations recognized the need for a more diversified economy that could weather the ups and downs of tourism. For example, Macau was hoping that technology would help the gambling hub recover from its pandemic-induced economic slump. In December 2021, the city hosted 'Beyond', a technology event loosely modelled on the massive CES trade show in Las Vegas. The event signaled the region's long-term plan to diversify its casino-focused economy for its population of 600,000. At one point during the pandemic, hotel occupancy in Macau fell from 96% to just 3% in a matter of weeks.

4.3 Adapting communications

An important lesson from this pandemic is that keeping open lines of communication during a crisis - to all stakeholders - is crucial. A number of tourism organizations around the world clearly understood the importance of frequent communications including: Tourism Australia, Visit Las Vegas, Dubai Tourism, Aruba Tourism Authority, Auckland Tourism, Maldives Marketing & Public Relations Corporation, and more. Using a variety of communication tools - from safari operators in South Africa sending WhatsApp messages to customers in key markets, to Dubai Tourism working with 'influencers' to promote the city to Israelis - these organizations also understood the need to change the message's tone as the crisis unfolded.

Tourism Australia is good example of a DMO adapting its communications. Early on in the pandemic, the organization launched an advertising campaign called 'There's Still Nothing Like Australia' in an attempt to convince Americans and Britons that Australia was a safe alternative to Asia. However, when the pandemic took a grip on travel, Tourism Australia changed tack, releasing a video called 'With Love From Aus', emphasizing the message that nature was getting some rest and relaxation while tourists were in isolation. With no international visitors, Tourism Australia then looked to domestic tourism to keep the industry alive and launched the 'Holiday Here This Year' campaign encouraging Australians to travel internally. Australia moved into 2021 as "a pandemic success story" according to the Washington Post, and even though Australia's borders were closed, Tourism Australia was busy advertising in international markets in the hope that when people could eventually travel again, Australia would be top of mind.

Communicating to internal stakeholders was also critical during the pandemic, and many destinations recognized this critical component. Auckland Tourism, Events and Economic Development (ATEED) posted a temporary page banner on its homepage called 'Tamaki Makaurau Auckland – COVID-19 updates' and provided up to date news articles on its 'Latest News' link. The organization was also very active on social media, posting regularly on Facebook, YouTube, LinkedIn and Instagram. Weekly email updates to thousands of Auckland businesses alerted them to practical support available from regional and national sources, highlighting updates to the resources page. ATEED also contacted small and medium-sized businesses offering a free online tool to help them boost their digital know-how, including guidance on remote working, e-commerce, and increasing their online presence to help customers to find them.

If history repeats itself, those organizations that remained vocal during the crisis likely will recover faster than others, having communicated to consumers the image of corporate stability during challenging times, and maintained or even increased 'share of mind'. Some destinations may even experience a 'halo effect' resulting from the positive media that they have received in dealing with the crisis and for being perceived as relatively 'COVID-free'. Countries like New Zealand, the South Pacific, Vietnam, and Australia may move to the top of the list of 'desired destinations' for many travelers (and as desired places to live). These countries paid a high price economically for prioritizing health over wealth in the short term, but they could receive a positive, long-term economic impact of this strategy. Similarly, tourists are likely to avoid destinations receiving negative media over their handling of the crisis. Most Chinese travelers, for example, have a dim view of other countries' management of the pandemic, and are unlikely – certainly in the short term - to travel to destinations they perceive as being unsafe.

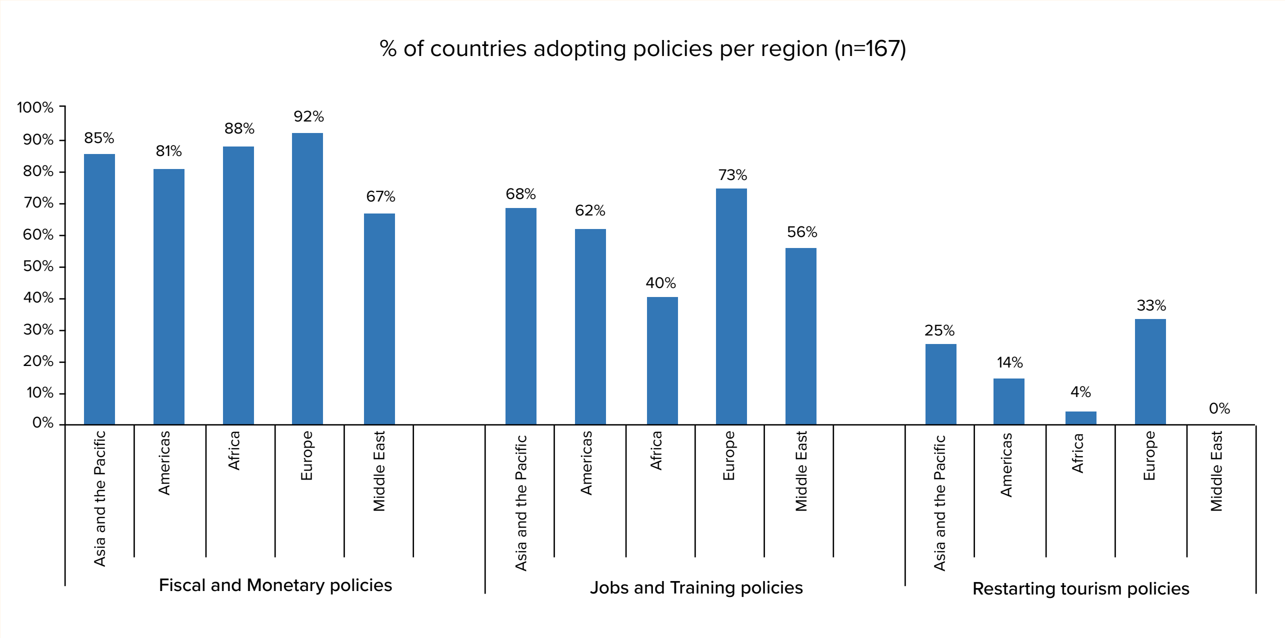
Another tactic that proved to be successful during the crisis for tourism and hospitality providers was engaging in philanthropic activities. A recent article in the *Journal of Business Research* suggests that corporate social responsibility (CSR) will not go unnoticed by consumers, and such behavior will be even more important in the future. "The pandemic will teach us a lesson that 'we are all in this together', which undoubtedly will raise people's expectation of businesses being more socially responsible. Therefore, we can envision the post-pandemic period as one in which the thriving businesses are those with strong CSR commitment and effective CSR strategies and efficient implementations. Greenwash, pinkwash, and lip services will no longer survive closer consumer and public scrutiny," said the authors (He & Harris, 2020).

4.4 Adapting financial models

With few visitors, many tourism and hospitality organizations relied on government support to get through the crisis. One UNWTO report found a swift and strong response by governments around the world to support the tourism industry in the wake of the pandemic (UNWTO, 2020b). Of 220 countries and territories analyzed, 167 countries reported specific measures to mitigate the effects of the crisis on tourism and accelerate recovery (see Figure 2). Among them, more than 144 countries adopted fiscal and monetary policies, followed by policies to support jobs and training which were implemented by 100 countries. A smaller number – particularly in the APAC region and Europe - were moving forward with initiatives to restart tourism and promote domestic demand.

Government assistance varied considerably. Some countries were more supportive than others in allocating specific funds to the tourism sector. In Canada, government funding of over $10 billion flowed to tourism sector businesses, and in the US the airlines alone received the same amount in the first round of stimulus funds. The UK government introduced sector-specific policies to support the tourism and hospitality industry, and the New Zealand government made every effort to support its beleaguered tourism sector. Costa Rica's economic benefit program, called PymeProteger, provided monetary aid and resources by means of a $15 million fund for six months to vulnerable micro, small and medium-sized tourism businesses. In Indonesia, the Ministry of Tourism distributed over $200 million worth of tourism grants for hotel and restaurant tourism businesses and local governments. Some countries were creative in distributing these tourism-specific funds. In Portugal, for example, an incubator program supported innovative tourism-based ideas that would contribute to the development of the tourist offering in Portugal and to improve the competitiveness of the sector.

Figure 2: Specific measures by governments to mitigate the effects of the crisis and accelerate recovery (Source: UNWTO, 2020b)



However, industry stakeholders in many countries - India, Nepal, South Africa, Sri Lanka, Mexico, the Philippines and Iran - were critical of support from their governments during the pandemic. Most businesses in the tourism industry tend to be small companies with limited retained earnings to weather economic shocks. Many small businesses fell through the cracks as far as fiscal support was concerned, and support for informal workers, many of whom rely on tourism for their livelihoods, was comparatively low. Government interventions also provided little support to non-registered businesses which were severely impacted by the pandemic. In Laos, for example, workers engaged in informal micro and small enterprises (MSEs) were the most exposed in the crisis, and often lacked basic social protections. Around 83% of the labor force is employed in the informal sector in Laos, and MSEs make up more than 80% of enterprises, relying on daily sales to survive and support the household of the owner. A surge in poverty in the fallout from COVID-19 was exacerbated by hundreds of thousands of returning migrants who had lost their jobs in countries like Thailand.

Poverty also increased significantly in Sri Lanka with over 500,000 people falling into poverty as a result of the crisis, which led to an increase in the poverty rate from 9.2% in 2019 to 11.7% in 2020. Informal workers, many of whom were low-income earners working in the service sector, did not benefit from social protection. Increased poverty was also a consequence of the pandemic in the Philippines. Already one of the most disaster-prone countries in the world, the country experienced the highest number of coronavirus infections and COVID-19 deaths in Southeast Asia after Indonesia, and suffered its first recession in nearly 30 years in the second quarter of 2020. Worldwide, the World Bank predicted that the pandemic would reverse the trend of a steady decline in poverty in recent years, resulting in an additional 2.7 million poor people.

The fragility of the tourism and hospitality sector was not limited to just developing countries. In the US, the restaurant sector was already in trouble long before the pandemic arrived, so losing 17% of restaurants (about 110,000 went out of business) in 2020 was not too surprising. Many of these casualties were well-established restaurants and fixtures in their communities. The crisis also was seen by some as a chance to reevaluate the industry's structural inadequacies and to create a more stable business model. For many, the pay structure needs to change as well as the overreliance on cheap labor. A recent *New York Times* article recommended 'reimagining hospitality' post-COVID, making restaurants a safer, fairer place to work, with higher wages, comprehensive benefits and stronger support systems for workers. "It may also make more room for employee-owned restaurants, unions and community-driven models" (Rao, 2021).

4.5 Adapting to new technology

The COVID-19 pandemic transformed how people interact with each other, receive medical care, spend leisure time, and conduct many transactions of daily life. These changes accelerated the migration to digital technologies at stunning scale, speeding across every sector including tourism. The analysis revealed numerous examples of technology adoption, and not just in the developed world. For example, the Tourism Council of Bhutan used the opportunity to improve efficiency in its tourism sector by upgrading online entry procedures, and Nepal, the Philippines and Cambodia all accelerated the transition to e-commerce platforms.

Japan, not surprisingly, used technology to deal with many of the challenges the country faced during the crisis. To help restore the business events industry, the Japan National Tourism Organization (JNTO) launched an online 'Meet Japan' educational program for event professionals. PACIFICO Yokohama, one of Japan's premier business event venues, was one of the first to host online and hybrid events, which featured a mix of physically and virtually present participants. Entrepreneurs in Japan also came up with a virtual bar service to replace the Japanese *izakaya*, the usually boisterous pubs frequented by the Japanese. Customers could video-call each other while ordering appetizers from a local izakaya in advance that would be delivered to their homes so that they could share the same food with friends and relatives anywhere in the country.

The development of China's digital economy also accelerated during the pandemic, impacting the tourism sector. Hotels in China, for example, focused on technology to meet consumers' higher standards for health and safety. All 5,700 hotels under the Huazhu umbrella - China's leading multi-brand *hotel* group - provided contactless services whereby consumers could check-in and check-out via app or kiosk to avoid human contact, and 1,200 used robots to deliver room services and outside deliveries to consumers. Targeting young consumers who were the first to travel after lockdown, the travel industry in China shifted its marketing focus to emerging social platforms, and experimented with new content formats such as livestream and short videos.

Organizations in a number of countries – including the UK, Singapore, Mexico, Maldives and Sri Lanka – employed virtual reality to engage with consumers remotely while they could not travel. Would-be travelers could explore 'virtually' the filming locations in the UK featured in the *Harry Potter* films, or the locations from *Crazy Rich Asians* in Singapore, or participate remotely in morning yoga by the beach, vicarious snorkeling, or cooking lessons in the Maldives. One safari company in Africa, &Beyond, was so successful with their virtual private safari experiences that they managed to fund conservation projects. Conservation was put under enormous pressure during the pandemic.

Technology also played an important role in the roll out of new health and safety protocols in hotels and resorts. For example, New York hotelier John Fitzpatrick installed an electronic thermometer at the front door that took the temperature of workers, guests and other visitors to his hotels, and employed a robot to help sterilize bedrooms. To facilitate a touchless vacation, a 'My Club Med App' allowed guests to enjoy a seamless experience from the start of their trip to the end, with options to create a personalized itinerary, preview the daily activity schedules and, at select resorts, book spa appointments and order room service. Sri Lanka Tourism also developed its first travel App to meet the new detailed COVID-19 health

protocols for the industry. The App - created with the support of the Information and Communication Technology Agency (ICTA) and United Nations Development Program (UNDP) - shared tourist booking data (including flight details and accommodation) with Ministry of Health regional and district offices.

Finally, many stakeholders in the business travel sector took advantage of advances in technology to get through the pandemic. For example, Bench Events launched *Hospitality Tomorrow*, a virtual conference platform to support the hard-hit international hospitality community during COVID-19. The first episode took place on 7 April 2020 and attracted 5,323 virtual attendees from 128 countries. The immersive conference experience featured industry insights by global speakers on the main 'live' stage and in break-out sessions and roundtables, as well as live face-to-face networking and a virtual Expo hosted by the event sponsors.

4.6 Adapting human resource management (HRM) strategies

Speaking at the end of 2020, Deputy Minister of Tourism and Creative Economy in Indonesia, Angela Tanoesoedibjo, said a key focus of the ministry is preparing the industry for adapting to new post-pandemic norms and, for this purpose, provided free training for the Indonesian tourism industry through webinars. This theme seemed common throughout the pandemic, as the tourism and hospitality sector prepared for a 'new normal'. The Philippines Department of Tourism staged various educational webinars focusing on innovation, entrepreneurship, culture and heritage, sanitation and hygiene, and e-commerce, among others. Many hotel groups like Deutsche Hospitality - owners of hotels across three continents - offered training webinars to employees while they were in lockdown. The group's 'Staff Training Staff' project won an eLearning Award in 2020. Employees prepared brief training videos on selected topics relating to their daily work, and the final products were available for their co-workers. Videos could be accessed via mobile devices at any time and in any location.

In Portugal, the government developed online training programs, workshops, webinars, and networking meet-ups online. This initiative helped businesses navigate the effects of COVID-19 and provide advice for employers impacted by the crisis, with special attention to the digital transformation and the need to upgrade digital skills. Portugal's Directorate-General for Health also created online training programs for employees in the industry, including providing information to guests and offering protective equipment like masks. The Nepal Tourism Board (NTB) prepared guidelines on safety measures for the industry to be implemented for the tourism sector once the nationwide lockdown was lifted for international tourists. As part of its COVID-19 recovery strategy, the UK government introduced the Small Business Leadership Program aimed at showing companies and managers how to adapt and thrive post-COVID.

The Sri Lanka Tourism Alliance launched several new initiatives to support the sector with insights, tips, and planning next steps as an industry via an educational webinar series. Organizations in Laos also recognized the need for upskilling in response to the pandemic. For example, the Institute of Mass Media, Culture and Tourism (IMCT) launched COVID-awareness training for 100 micro and small tourism and hospitality businesses. The half-day program trained businesses in establishing practical health and safety measures, providing them with a COVID prevention kit consisting of posters to educate staff and customers, thermometers and an initial inventory of facemasks, cleaning gloves, hand gel and cleaning disinfectant. After completing the training, businesses signed a commitment to implement these practices and received a certificate for promotional purposes.

Finally, the Singapore Tourism Board (STB) employed various measures to support the industry, including funding training courses for employees in the sector. A Tourism Recovery Action Taskforce was formed early on in the pandemic to map out recovery strategies, and the STB developed tools and platforms to help tourism businesses accelerate their digital transformation. "Businesses must act now and seize the chance to train workers in emerging skills and new capabilities that will be sought in the new COVID-19 environment. By adapting to the new realities and accelerating their transformation, they will be better-positioned to capitalize on opportunities when recovery comes," said CEO Keith Tan.

Some organizations created completely new roles for employees in response to the pandemic. Trafalgar, a leading tour operator, introduced 'Wellbeing Directors' to accompany each tour with the job of ensuring implementation of the company's new hygiene and physical distancing standards. At Anantara Veli Resort in the Maldives, a 'Guest Guardian' was appointed to ensure health and safety compliance was adhered to at all touchpoints, and employees received enhanced COVID-19-related health and safety training. And finally, in a very creative move, Pier One Sydney Harbour in Australia employed a 'hand sanitizer sommelier' whereby a selection of hand sanitizers from some of Australia's local alcohol brands were made available to guests and diners.

In terms of specific skills required in the tourism sector post-pandemic, a study of the challenges facing the tourism and hospitality industry in India suggests that employees' engagement in multiple job roles is becoming the norm in hospitality and tourism. Workers need to be flexible and adaptable throughout the pandemic. The study in India also recommended better crisis preparedness in the future. Study results confirm that tourism and hospitality leaders were not ready for this pandemic. The first step to the successful management of any crisis is establishing a crisis management team *before* any crisis breaks out. The only known tourism organization that seemed to have such a team was Disney, which has a Global Crisis Management team.

5. Stakeholder interviews

Fifteen in-depth interviews were conducted with key industry stakeholders across South Carolina. Interviewees were from various sectors of hospitality and tourism industry. These informants include general managers of both limited-service and full-service hotels, general managers and executives of clubs and resorts, president of CVB, owners and general managers from local and chain restaurants, and independent wedding planners. The interviews sought to understand how organizations in South Carolina had changed in response to the pandemic in regard to their products and services, markets, communications, financial models, technology, and human resource management strategies. Interviewees also provided insights into government interventions during the COVID-19 pandemic and prospects for the future, post-pandemic. Interviews were conducted through mid-March to mid-May 2021. Each recorded interview lasted between 50-70 minutes was transcribed into a text file. Transcripts were coded manually by three researchers independently, and then analyzed using NVivo.

In general, most stakeholders interviewed felt that their organizations were able to pivot and adapt quickly to the pandemic. They reported acting proactively with setting up new cleaning protocols, and remained in constant communication with the employees, emphasized protecting staff and customers, and implemented creative ways to bring in more business. Amidst the confusion with policy changes, most participants found support from the government (PPP) and industry associations (SCRLA and AHLA) were critical for navigating through the pandemic. With businesses opening-up again, they were seeing a growth in demand; however, a huge employee shortage is affecting operations. The challenge of employee recruitment and retention needs to be addressed – signified by the importance of the word ‘employees’ in the word cloud generated from all the interviews (see Figure 3).

Figure 3. Word cloud summary from stakeholder interviewees

5.1 Adapting products or services

For the lodging sector, products or service offerings had not changed significantly according to interviewees. However, additional cleaning procedures and sanitation protocols have been added to protect the safety of customers and employees, as well as to portray a ‘clean’ image for the property. One participant indicated that “*brand commitment to cleanliness was kind of boilerplate. Every hotel had to meet those standards. But then we could add in what we were doing in addition.*” Such cleaning procedures and protocols were usually a combination of brand guidelines and property specific procedures, with the later usually developed immediately after the COVID-19 prior to receiving guidelines from the brand.

For the food and beverage sectors and those lodging or club facilities who have food and beverage services, many added delivery service or increased their existing volume of take-out/delivery orders, “*making a big shift in what we’re delivering.”* Adding a delivery service was necessary to continue creating an experience for customers whilst protecting their safety. Along with the delivery service, some restaurants offered online cooking and tasting activities to further engage with the customers. However, some operators experienced challenges with delivery and take-out services. On participant said: “*they’re [third-party delivery companies] in the same predicament everybody else is in right now. They have no drivers. There’s no labor. So, at one restaurant last week we had eight orders not picked up. Because they just don’t have people.”* Others had supply issues of not being able to get desired to-go containers, some companies experienced difficulty keeping up with the pace of take-out/delivery orders, and a few also had problems with the suitability of their existing menu items as delivery options.

Many participants reported that customers came back sooner than expected after the pandemic, and this surge created its own challenges – the main one being that they did not have enough staff to cope with demand. Many laid-off employees had either switched to other jobs or were reluctant to come back. Operators also believed that the unemployment and stimulus checks were responsible for difficulties in recruitment for getting employees back to work. The issues with shortage of staff forced many operators to limit capacity.

5.2 Adapting to new markets

South Carolina’s lodging sector saw an increase in domestic customers from further away than usual. Some hotel managers suggested that this behavior was due to guests who traditionally would travel internationally choosing to travel domestically. “*We’re seeing that a lot of our customers are affluent people who would normally travel overseas.”* Many hotels reported having to lower rates after lockdown due to the fact that “*there were many leisure guests that are rate seekers*.” Their loyal guests who were business travelers or large groups had not yet returned. One hotel mentioned that they “*opened the per diem rate for government, something we normally don’t do”* to maintain the level of business. As business restrictions lifted, hotel operators saw the return of SMERF markets (Social, Military, Education, Religious and Fraternal), allowing properties to slowly increase their rates. However, hotels reported that the lack of business travelers still hurt business, as well as added more stress to operations. Hotel operators reported that transient guests tend to be more demanding and labor-intensive. One participant describing having transient guests as "*herding cats*."

Restaurant sector informants suggested that adding delivery allowed them to reach out to some customers that they may not usually have. Bundled meals also attracted new family business. In addition, loyal customers returned as soon as restrictions were eased. One restaurant added an entertainment component to the business during the pandemic, and indicated that he would continue to target guests who were nightlife seekers.

5.3 Adapting communications

With smaller marketing budgets, many participants focused on increasing their online presence through social media marketing. Some businesses even added a full-time social media marketing position that they intend to keep for the foreseeable future. In the lodging sector, most hotels moved towards streamlining their marketing messages rather than over-communicating the COVID-19 policies. Similarly, over one-half of the respondents indicated that they were using communication technology, specifically for internal communication and scheduling purposes. While some companies were using applications like Zoom or Microsoft teams, others had their own corporate applications that were used for internal communication and to track customer demographics and psychographic profiles. Such technology was beneficial in monitoring data to make necessary adjustments to target markets. One participant noted how she would "*drop off a Zoom call and hop on a WebEx, and then hop on to go to a meeting on Teams*."

5.4 Adapting financial models

For many participants, making changes to the financial model was less of a planned process and more of a knee-jerk reaction. "*We were forced to pivot and adapt. Those were probably the two words of 2020 we in the hospitality industry had to do more than anybody else*." Since regulations were changing frequently, organizations had no other option but to innovate and move forward. They had to adopt a conservative budgeting strategy, focusing on efficiency and paying attention to detail that would have gone unnoticed during normal times.

Many participants reported that COVID-19 had decreased their profit margins, and increased labor costs. Without tips on to-go orders and the tips on food delivery go to the delivery drivers, some restaurants had to increase servers' wages by $2-3 per hour. Sourcing delays, product shortages, and cost increases also affected the bottom line. To compensate for the cost increases, some restaurants removed happy hours, added cover charges, and promoted family bundles and to-go alcoholic beverages instead of increasing menu prices. Some interviewees also took pay cuts while working full time, just to keep the business running. "*Myself, the director of finance, and the GM took 20% pay cuts working five days. A lot of people work four days*."

However, low hotel occupancy forced lower average daily rates. In survival mode, many hotels adjusted pricing to cover just their operating cost. They also had to look for other revenue streams, such grab-and-go breakfasts. While leisure travelers were slowly returning, getting business travelers and group bookings was more challenging. The participants also mentioned that they had to put all new projects on hold because of the strain in cash flow. Equipment investments focused on implementing new technology and hygiene and sanitation products. Most businesses applied for both rounds of PPP (Paycheck Protection Program) and so they were able to support their staff. They also appreciated the role taken by associations, such as SCRLA and AHLA, for their support during these challenging times.

5.5 Adapting to new technology

COVID-19 forced all stakeholders interviewed to quickly adopt new technologies. In the restaurant sector, such technologies include the introduction of mobile applications, advancement of point of sales (POS) systems, and third-party delivery systems. The use of contactless menus using barcodes or one-time use menus was also very popular. One restaurant operator reported putting QR codes on aluminum table tents and "*we will never go back to regular menus*". Other restaurant managers who have an older clientele were less inclined towards such technologies and pointed out that "*we can't do this [use QR Codes] because we have older clientele at the restaurant, they don't quite get i*t."

Hotels also increased their use of technology, enhancing hotel operating systems, mobile-app integration, key-less entry, and contact-less check-ins and check-outs. Technology also assisted the implementation of ionizer air purifiers and electrostatic sprayers. While a few of these changes were already being incorporated before the pandemic, most participants agreed that COVID-19 accelerated the technology adoption process. "*What we recognized is that nothing stays static ....it continues to change pretty dramatically*". Surprisingly, not all participants were comfortable adopting new technology during the pandemic. As one said: "*Technology and I don't get along. I still have not figured out how to hug somebody or tell them thank you with a handshake through an email*."

5.6 Adapting human resource management (HRM) strategies

HRM discussions centered on employees (see Figure 4). Participants said they initially furloughed or laid-off most of their employees due to temporary closure or decreased business levels. Primarily, these employees were hourly workers. However, operators kept the management team employed, and cross utilized them to cover various duties as needed. One participant indicated that keeping the management team was critical to maintaining the company culture.

Some indicated that the pandemic was actually an opportunity to get rid of some “*bad apples*”. After restrictions lifted and business gradually resumed, re-employment was offered to most furloughed employees. However, some respondents said that they had lost employees to other industry sectors during COVID-19, or were experiencing difficulties bringing them back.

Finding new employees after lockdown proved to be problematic for everyone, with many interviewees suggesting that people were more inclined to sit at home and collect unemployment checks. *“This labor shortage is the biggest takeaway right now from this pandemic.”* Many employers said that most of their scheduled interviews are no-shows, and one decided to share the names of these ‘no-shows’ within their networks. Others reflected on the low pay for hourly positions in hospitality and tourism industry. They were either looking into addressing the problem or had already raised wages.

Post-pandemic, all participants indicated that they were always looking for people who have a good attitude and strong work ethic, and that soft skills were going to be important: “*We can train skills, but we cannot train how to smile.”* When bringing employees back to work after restrictions were lifted, most retraining focused on sanitation and cleanliness protocols. After bringing employees back to work, stakeholders indicated that they been more flexible with work hours, especially at the very beginning. Some employers even allowed employees to bring children to work or provided childcare services.

During the pandemic, all interviewees agreed that communication with employees had been critical. Various methods were used to communicate with employees before and after bringing them back to work, including text, emails, phone calls, and apps. Communication has been mainly focusing on updates with COVID-19 and for checking in with team members. Some managers also connected employees with resources, such as COVID-19 testing. Others assisted employees by providing free meals for the household or by giving them gift cards for groceries.

Figure 4. Word cloud generated from discussions related to HRM strategies

6. Executive survey

With the assistance of SCRLA, a state-wide survey of hospitality industry managers was conducted in August 2021 to assess business and geographic similarities and differences. The request for participation resulted in 525 surveys that were usable for analysis. Respondents are managers who are employed by various hospitality business areas including the lodging sector (31%), food & beverage (28%), attractions (19%), and clubs (5%). The remainder are employed in other sectors such as travel agencies, casinos, transportation, entertainment, and timeshare companies. The respondents hold various managerial positions including general managers (34%), supervisors (25%), department managers (12%), assistant managers (10%), human resource managers (8%), and the remainder are in other roles such as owners. Out of the 525 respondents, 200 were furloughed during the pandemic. The respondents are mainly Caucasian 75%, and the gender split is about 45% male and 55% female. Respondents geographical work areas are fairly representative of South Carolina’s population densities: Upstate region (35%), Pee Dee (12%), Midlands (29%), and Lowcountry (24%). In terms of educational background, 16% have a high school degree or lower, 31% have some college or associate degree, 34% have a bachelor’s degree, and 18% have a master’s degree or a doctorate degree.

Respondents were asked to indicate their level of agreement (on a scale of 1 to 7 where 1 = strongly disagree and 7 = strongly agree) with a series of questions about how their organizations had adapted in response to the pandemic regarding their products and services, markets, communications, financial models, technology, and human resource management strategies. The results are presented below. ANOVA tests also examined differences between groups of respondents by business type (e.g., hotel, restaurant) and amount of work experience. In general, those results show statistically significant differences for the attractions sector. Respondents working in the attractions sector were more likely to make adaptations during the pandemic. Also, respondents with more work experience tended to make more adaptations. This finding likely relates to the relationship between years of experience and management level. Higher level managers tend to oversee a broader array of functions, overseeing more operational changes.

6.1 Adapting products or services

Results show that executives generally rate the product and service adaptations in their organizations as high ($M= 5.28$, $SD= 1.81$). Table 1 shows the main service or product adaptations made by organizations during the pandemic relate to new hygiene protocols. A higher mean (average) reflects a greater likelihood of product/service adaptation. Most respondents implemented new cleaning and disinfection protocols, changed the layout of public spaces to allow for social distancing, and adapted their food service and preparation. The majority also introduced ‘low-touch’ digital technologies. Respondents report being less likely to reduce working hours, donate food surpluses, and adapt meeting spaces or cater to customers looking for ‘workations’.

Table 1. Adapting products or services

Adaptations made to products/services during the pandemic	Mean	SD
New cleaning and disinfection protocols were implemented	5.98	1.50
New food preparation and serving protocols were implemented	5.77	1.56
The layout of public spaces (lobby, common areas, restaurant, etc.) was modified to allow social distancing	5.61	1.77
More active measures for the use of contactless digital technologies (digital keys, digital payment, mobile payment, digital interactions, etc.) were introduced	5.60	1.69
The health of your guests was monitored during their visit	5.30	1.76
The facilities have been used as a place to welcome employees from the health sector	5.20	1.78
Meeting spaces have been used for other purposes	4.93	1.93
Our hours of our operation were reduced	4.90	2.08
Our organization has taken advantage of the demand for “workations” (people wanting to work away from home)	4.75	2.03
Food surpluses have been donated (to employees or NGOs) due to the closure of the establishment	4.74	2.02
Overall	5.28	1.81

6.2 Health and safety measures employed by organizations during the pandemic

Table 2 lists the specific health and safety measures implemented by organizations during the pandemic. Respondents indicate that organizations requested staff to obey regulations of safety management related to COVID-19 prevention, established a safety responsibility system, and introduced safety regulations related to COVID-19. However, organizations were less likely to insist employees were vaccinated before coming back to work. This position appears to be dynamic, and over one-half of US employers are planning or considering requirements for COVID-19 vaccinations by the end of 2021 (Green, 2021).

Table 2. Health and safety measures employed during the pandemic

Health and safety measures employed	Mean	SD
Requested that staff obey regulations of safety management related to COVID-19 prevention	5.80	1.42
Established a safety responsibility system	5.76	1.39
Quickly established safety regulations related to COVID-19 prevention	5.74	1.36
Regularly monitored the employees’ safety performance	5.60	1.48
Mandated that employees be vaccinated before coming back to work	4.59	1.40

6.3 Service innovation

Results show that executives generally rate the service innovation in their organization as high (M= 5.42, SD= 1.14). Table 3 lists service innovations introduced by organizations during the pandemic to better serve their customers. Most respondents modified their service approaches, focusing on innovation and creating a risk-free environment for employees and guests.

Table 3. Service Innovation

Service Innovation	Mean	SD
Our organization constantly seeks new ways to better service our customers	5.75	1.40
Our organization is able to modify our current service approaches to meet special requirements from customers	5.68	1.44
Innovation is an important part of our organizational culture	5.64	1.46
Our organization’s top management gives special emphasis to service innovation	5.51	1.46
Our organization creates a risk-free environment for our employees	5.48	1.57
Our organization creates a risk-free environment for our guests	5.46	1.54
Our organization invests in human resources for innovation in services	5.44	1.57
Our organization invests in human resources for innovation in services	5.29	1.64
Our organization usually follows our closest competitors when introducing new service offerings	5.28	1.64
Our organization often lacks the capital investment to develop new services	3.62	2.06
Overall	5.42	1.58

6.4 Marketing adaptation

Results show that respondents rate the marketing adaptation in their organization (M= 4.9, SD= 1.71) as moderate (see Table 4), the main marketing adaptations made by organizations during the pandemic focused on seeking new customers and promoting special offers. Respondents were less likely to provide discounts to attract customers. Instead, most businesses focused on promoting new products to new customer segments, and using more media channels than prior to the pre-pandemic.

Table 4. Marketing adaptation

Marketing Adaptation	Mean	SD
We actively targeted new customer segments	5.56	1.40
We frequently promoted special offers	5.41	1.62
Our promotional messages specifically focused on health and safety	5.30	1.56
We aggressively promoted our new products.	5.30	1.54
We used more media channels than normal to promote our products	4.94	1.77
We reduced joint campaigns with other partners	4.55	1.79
We reduced joint campaigns with local merchants	4.53	1.83
We decreased the bundling of products	4.50	1.83
We rarely offered discounts in order to attract customers	4.19	2.06
Overall	4.92	1.71

6.5 Marketing innovation

Results show that respondents rate the marketing innovation in their organization as high (M= 5.14, SD= 1.54). Most respondents agree that the pandemic sped up innovations, such as keyless entry, takeout services, etc. (see Table 5). Management was also receptive to innovative product/service designs, marketing ideas, and changes in product prices. Respondents were less likely to perceive new marketing ideas as risky and more likely to accept innovative ideas.

Table 5. Marketing innovation

Marketing Innovation	Mean	SD
The pandemic has sped up the adaptation of innovations (e.g., keyless entry, takeout service, etc.)	5.55	1.48
Management actively seeks innovative marketing ideas	5.52	1.49
Improvements in product or service design are readily accepted by management	5.46	1.45
Improvements in product promotional activities are readily accepted by management	5.40	1.45
Changes in product pricing are readily accepted by management	5.37	1.45
New marketing ideas are perceived as too risky*	3.55	1.90
Overall	5.14	1.54

* Original question was reverse coded and stated, "New marketing idea are perceived as too risky."

6.6 Communication adaptation

Results show that executives generally rate the communication adaptation in their organization as high (M= 5.30, SD= 1.59). Table 6 shows the main communication adaptations made by organizations during the pandemic was related to keeping employees up to date about COVID-19 related information. Most companies focused on constantly engaging and communicating with employees and customers using various channels. Respondents report a slightly higher rate of communication adaptation for internal (employees) than external communications (customers), but the results show all communications were adapted to keep stakeholders aware of company efforts to assure overall health and safety.

Table 6. Communication adaptation

Communication Adaptation	Mean	SD
Actively kept employees up to date about COVID-19	5.66	1.51
Used communications to comfort employees	5.58	1.52
Frequently used text, e-mails, and telephone or online methods to communicate with employees	5.58	1.49
Talked to employees regularly to see if they were coping	5.54	1.52
Talked to employees to ensure they felt safe	5.53	1.51
Changed the tone of the message (e.g., “stay safe” rather than “come and visit”) as the crisis unfolded	5.50	1.49
Actively looked for information to help employees during the COVID-19 pandemic	5.42	1.54
Changed marketing messages to fit new consumer preferences (e.g., promoting activities outside or promoting health and safety)	5.37	1.51
Frequently spoke with employees to find out how they were experiencing the crisis	5.36	1.57
Communicated effectively to consumers an image of corporate stability during the pandemic	5.25	1.52
Spent more money than usual on advertising to customers during the pandemic	4.65	1.84
Decreased communications to customers during the pandemic	4.15	2.07
Overall	5.30	1.59

6.7 Financial adaptation

Results show that executives generally rated the financial adaptation in their organization as moderately high (M= 4.9, SD= 1.36). The main financial adaptations made by organizations during the pandemic relate to the increasing responsibilities of managers and employees (see Table 7). To decrease operational costs, many organizations had to lay off or furlough their employees. Therefore, remaining employees had additional responsibilities. Most organizations also added alternative revenue sources to combat loss in regular revenue streams. Respondents were less likely to purchase lower priced supplies.

Table 7. Financial adaptation

Financial adaptation	Mean	SD
Asked managers and employees to take on extra responsibilities	5.34	1.62
Added alternative revenue sources (e.g., delivery and to-go options)	4.96	1.81
Cut costs by closing less-used facilities	4.94	1.86
Significantly reduced range of services	4.90	1.80
Delayed capital improvements	4.83	1.75
Postponed maintenance plans	4.77	1.86
Purchased lower-priced supplies	4.64	1.85
Overall	4.91	1.79

6.8 Resource adequacy

Results show that respondents felt their companies had adequate resources to survive COVID-19 (M= 5.38, SD= 1.51). As shown in Table 8, most respondents believed that the size of their business and diverse customer base would aid them in overcoming the COVID-19 crisis.

Table 8. Resource adequacy

Resource adequacy	Mean	SD
The size of my business will help it overcome the COVID-19 crisis	5.46	1.50
The diverse customer base of my organization will aid it in overcoming the COVID-19 crisis	5.40	1.46
My organization had adequate resources to withstand the COVID-19 crisis	5.37	1.57
My organization had access to adequate finances to help it overcome the COVID-19 crisis	5.29	1.49
Overall	5.38	1.51

6.9 Human resource management (HRM) adaptation

Results show that executives generally rated the HRM adaptation in their organization as moderately high (M= 4.89, SD= 1.82). The main human resource changes that organizations made during the pandemic relate to creating a safe workplace. Most organizations' HRM made adaptations to consider employees' physical and psychological safety, provided training, and appeased staffs' negative emotions. In comparison, respondents reported less likely to reduce pay, provide voluntary early retirement, or replace high-tenure employees with new employees (see Table 9).

Table 9. HRM adaptation

HRM adaptation	Mean	SD
Made a strong effort to create a safe workplace	5.75	1.39
Showed consideration for employees' physical safety	5.63	1.43
Made an extra effort to meet staff resource needs for safety in COVID-19 prevention	5.42	1.60
Showed consideration for employees' psychological safety	5.38	1.57
Expressed concerned about employees' daily lives	5.26	1.64
Provided face-to-face or online training to prepare employees for the "new normal"	5.17	1.73
Appeased staffs' negative emotions	5.14	1.62
Reduced the number of office hours or working days	4.96	1.89
Provided webinars to communicate with employees during the pandemic.	4.93	1.83
Created completely new roles for employees (health and safety officer, well-being director, etc.) in response to the pandemic	4.90	1.86
Reduced the labor force by laying off employees	4.85	1.97
Reduced the labor force by furloughing employees	4.84	2.00
Reduced the labor force by asking employees to take unpaid vacation	4.33	2.02
Increased reliance on outsourced human resources	4.30	1.98
Reduced pay rates	4.21	2.20
Provided voluntary early retirement or resignation plans	4.17	2.09
Replaced high-tenure employees with new employees	3.85	2.14
Overall	4.89	1.82

6.10 HRM challenges caused by the pandemic

Respondents were asked about the major workforce development challenges caused by the pandemic. Table 10 shows the main HRM challenges that companies faced. Since the pandemic, respondents have had difficulty retaining staff, managing employee absenteeism and recruiting staff with the necessary education and experience.

Table 10. HRM challenges caused by the pandemic

Challenges	Mean	SD
Retaining staff	5.24	1.69
Managing employee absenteeism	5.14	1.69
Recruiting staff with the necessary experience	5.07	1.77
Attracting young people to work in the tourism/hospitality/ restaurant industry	5.04	1.74
Promoting from within because of a lack of experience	4.87	1.83
Recruiting staff with the required educational qualifications	4.86	1.81
Overall	5.04	1.75

6.11 Skills employees will need post-pandemic

Respondents were asked what specific skills they think employees will need in the tourism and hospitality industry, post-pandemic. All the skills were reported as highly necessary (see Table 11), although the top three were customer service, adaptability and flexibility.

Table 11. Skills employees will need post-pandemic

What specific skills do you think employees will need in the tourism and hospitality sector post-pandemic?	Mean	SD
Customer service skills	6.24	1.061
Adaptability	6.15	1.022
Flexibility	6.02	1.229
Coping with more demanding customers	5.98	1.195
Experience in multiple job roles	5.82	1.261
Proficiency with technology	5.78	1.266
Crisis recovery skills	5.67	1.267
Other	5.26	1.712

6.12 Strategies to attract employees post-pandemic

When asked how to rank the following strategies on the order of importance for attracting employees post-pandemic, the most popular strategies are promoting a strong organizational culture, offering educational opportunities, and providing an attractive work environment. Whereas, offering better benefit packages and higher salaries received least emphasis (see Table 12).

Table 12. Strategies to attract employees post-pandemic

How important do you think are the following strategies for attracting employees post-pandemic? Please rank the following strategies	Mean	SD
Promoting a strong organizational culture	4.29	1.58
Offering educational opportunities	3.96	1.52
Providing an attractive work environment	3.76	1.57
Offering flexible working time/schedules	3.60	1.79
Offering better benefit packages	3.10	1.44
Offering higher salaries	2.28	1.56

6.13 Technology adaptation

Results show that executives generally rate the technology adaptation as less critical compared to other adaptations (e.g., human resources issues) in their organization (M= 3.89, SD= 1.13). Comparing business type, the attractions sector report higher technology adaptation (M=4.28) than lodging (M= 3.68) and food & beverage (M= 3.68).

Table 13. Technology adaptation

Technology adaptation	Mean	SD
Technological changes have opened new channels in which to access our customers	3.93	1.10
The technology used in our industry has changed rapidly during the pandemic	3.87	1.18
Technological change during the pandemic has provided important business opportunities	3.85	1.12
Overall	3.89	1.13

6.14 Technology use during the pandemic

As shown in Table 14, respondents were more likely to use technology to implement new health and safety protocols, engage with customers and provide contactless services. Virtual reality (i.e., virtual tours) appear to be comparatively less used by businesses to engage customers remotely.

Table 14. Use of technology during the pandemic

Use of technology	Mean	SD
Implement new health and safety protocols	4.26	0.92
Respond to customers' needs	4.15	0.95
Provide new services to customers	4.12	0.99
Benefit from customers' feedback	4.02	1.00
Provide contactless services during the pandemic (using Apps etc.)	4.02	1.11
Communicate with customers	3.95	1.14
Engage with consumers remotely while they could not travel using tools like virtual reality	3.77	1.26
Overall	4.04	1.05

5.15 Organizational performance during the pandemic

Respondents rated their overall performance during the pandemic in terms of adaptation. Results show that executives generally rate the performance of their organization during the pandemic as high (M= 5.39, SD= 1.45), although they were more likely to adapt communications and new technology than adapt financial models or target new markets.

Table 15. Organizational performance during the pandemic

Organizational performance	Mean	SD
Performed well in adapting our communications	5.49	1.39
Performed well in adopting new technology	5.40	1.49
Performed well in adapting our financial models	5.36	1.41
Performed well in finding new markets for our products	5.29	1.51
Overall	5.39	1.45

6.16 Support from government and industry associations

The Coronavirus Aid, Relief, and Economic Security (CARES) Act (2020) and Coronavirus Response and Consolidated Appropriations Act (2021) assisted workers, businesses, and industries. When asked if respondents if their business received support from the government, 362 (69%) said they received fiscal support from the government during the pandemic; however, 111 (21%) indicated that they did not receive any support from the government. About one-half (47%) of respondents report that they received government support in terms of policies to support jobs and trainings, 302 (58%) said they received government support in terms of the initiatives to restart tourism and promote domestic demand.

With regards to support from industry associations, 287 (55%) indicated that they took advantage of educational webinars, 290 received up to date information on how the pandemic and associated legislation, 294 (56%) received up to date information on applying for support/ funds, 225 (43%) had small business counseling, and 238 (45%) received restaurant revitalization funds. However, 143 (27%) indicated that they did not receive any support from industry associations.

6.17 Future post-pandemic strategies

When asked about their strategies, post-pandemic, many respondents reported relatively high agreement with implementation of all the mentioned strategies (see Table 17). The most popular strategies involved focus on health and safety (M= 5.95), followed by resilience (5.74), and training of employees (5.72). Whereas a focus on a low-touch economy (5.43), the least emphasis out of all the available options.

Table 16. Future post-pandemic strategies

Organizational performance	Mean	SD
Health and safety	5.95	1.26
Resilience	5.74	1.27
Training of employee	5.72	1.30
Cost management	5.70	1.28
New Technology	5.67	1.31
More Collaboration	5.67	1.28
Flexibility	5.66	1.27
Recovery plans	5.64	1.29
Seeking new opportunities	5.58	1.45
Sustainability	5.55	1.42
Local markets	5.54	1.26
Revenue management in other revenue-generating departments	5.46	1.37
A low-touch economy	5.43	1.40

6.18 Disaster recovery strategies

Regarding crisis or disaster recovery strategies, most respondents report that their organizations had a plan in place before the pandemic. These crisis plans are for natural disasters (66%), 236 (45%) had a recovery strategy for man-made disasters (45%), and pandemic disasters (24%). A total of 370 (70%) respondents report that they had at least one of three disaster recovery strategies in place, and only 29 (6%) had all three. Out of 525 respondents, 381 (73%) reported that their organization will have a crisis recovery strategy in place post-pandemic, while 36 (7%) report that their organization will not have a crisis recovery strategy in place and 108 (20%) do not know.

7. Consumer survey

In September 2021, a national survey of US travelers was conducted using a panel identified by a private research firm. A total of 510 consumers completed the survey. Respondents were mostly Caucasian (78%), with more females (70%) than males (28%). The sample's education level is high; about 75% of respondents have post-high school education (i.e., some college or Associate degree, Bachelor's degree, or Master's/Doctorate degree). Almost one-half (47%) of the respondents reported they are married. Typically, most respondents (78%) take 1-3 overnight leisure trips per year, and about 21% of the respondents take 4 or more overnight leisure trips per year. For business travel, few respondents usually take four or more overnight business trips annually (8%), about one-quarter (23%) take 1-3 trips, and the majority (70%) do not travel overnight for business. Respondents were asked to indicate their level of agreement (on a scale of 1 to 7 where 1 = strongly disagree and 7 = strongly agree) with a series of questions about their travel behaviors and factors affecting their travel decisions. Scales were developed based on both the literature (e.g., Miao et al., 2021; Pan et al., 2021; Zheng et al., 2021) and the research conducted in the previous stages of the project.

7.1 Rational behaviors

In terms of rational travel behaviors since the pandemic, people are most likely to avoid congested areas (M = 5.35), prefer driving to destinations (M = 5.20), and choose destinations where social distancing is easy (M=4.99). However, respondents remain relatively neutral about staycations (day trips), avoiding multiple-stop trips (M = 4.55), or visiting nature-based destinations (M = 4.41).

Table 17. Rational behaviors

Since the COVID-19 pandemic, I am more likely to …	Mean	SD
Avoid congested areas	5.35	1.64
Drive to destinations	5.20	1.68
Choose destinations where social distancing is easy	4.99	1.68
Reduce travel activities	4.92	1.71
Travel domestically and regionally	4.91	1.78
Travel during the off-season	4.78	1.60
Stay in one area and take short excursions from that base	4.69	1.61
Staycation (take day trips from home)	4.67	1.77
Avoid multiple-stop trips	4.55	1.76
Visit nature-based destinations	4.41	1.83

7.2 Mindful behaviors

Since the COVID-19 pandemic, respondents are relatively mindful with certain types of travel (M = 4.72, SD = 1.57) (see Table 18). Results show that respondents prefer travel that respects local communities and people (M = 5.10), and travel that gives them a greater appreciation of their travel experience. These findings may be because many forms of travel are restricted, especially international travel, since the COVID-19 pandemic. Therefore, respondents may appreciate travel experience more; however, the findings are mixed. Respondents appear less interested in experiential travel (M = 3.98).

Table 18. Mindful behaviors

Since the COVID-19 pandemic, I am more likely to ...	Mean	SD
Prefer travel that respects local communities and people	5.10	1.54
Have a greater appreciation of my travel experiences	5.05	1.55
Be aware of the behavioral consequences of my travel	4.99	1.62
Choose more sustainable travel	4.48	1.57
Choose more experiential travel	3.98	1.58
Overall mean	4.72	1.57

7.3 Abstinence behaviors

Results show that respondents will take some measures to avoid travel (see Table 19). Refraining from air travel (M = 5.09) and avoiding traveling to large cities (M = 5.01) are the most likely abstinence behaviors. Results show a lower preference for postponing or canceling travel plans (M = 4.70) or shortening the trip duration (M = 4.39).

Table 19. Abstinence behaviors

Since the COVID-19 pandemic, I am more likely to ...	Mean	SD
Refrain from air travel	5.09	1.91
Avoid traveling to large cities	5.01	1.84
Postpone or cancel travel plans	4.70	1.85
Shorten the trip duration	4.39	1.87
Overall mean	4.80	1.87

7.4 Resilience

Results indicate that respondents are moderately resilient regarding travel in general (M = 4.65, SD = 1.51) (see Table 20). Resilience behaviors more common among respondents are adapting to travel plan changes (M = 4.87) and coping with travel-related stress (M = 4.87). Results suggest a rather neutral attitude towards travel problems (M = 4.02). Comparing respondents who indicated that they will consider international travel in the foreseeable future, the results suggest a higher resilience level (M = 4.77, t(508) = -2.73, p<.01) compared to people who do not plan to travel overseas anytime soon (M=4.52).

Table 20. Resilience

Resilience	Mean	SD
Easily adapt to changes in my travel plans	4.87	1.48
Can cope with the stress involved in travel	4.87	1.48
Always deal comfortably with whatever comes in travel	4.85	1.42
Can handle unpleasant feelings in travel	4.69	1.49
Rarely see the humorous side of travel problems (reverse coded)	4.02	1.69
Overall mean	4.66	1.51

7.5 General impact

Results show that the COVID-19 pandemic has not had a strong impact on respondents (M = 4.47, SD = 1.87), although for some it had changed hygiene standards (M = 4.76), increased anxiety levels (M = 4.38), and forced them to reconsider their way of life (M = 4.33) (see Table 21). Respondents also indicated that there is a moderate level of effect on their everyday life (M = 4.55). For more frequent business travelers (4 or more times per year), there is a higher level of general impact (M = 4.66, t(508) = -2.22, p<.05) compared to less frequent business travelers.

Table 21. Covid-19's general impact

General Impact	Mean	SD
Changed my hygiene standards	4.76	1.93
Increased my anxiety level	4.38	1.83
Made me reconsider my way of life	4.33	1.82
Made me fearful	4.32	1.85
No effect on my everyday life (reverse coded)	4.55	1.90
Overall mean	4.47	1.87

7.6 Perceived price changes in travel

Results show that respondents believe that the pandemic has increased hospitality costs (M = 5.01) and travel costs (M = 4.77) (see Table 22), but they are not prepared to pay more for travel (M = 3.74). The comparatively low participation in cost savings promotions is therefore surprising. Respondents say they tend not to have taken advantage of restaurant deals (M = 3.74) or travel deals (M = 3.23).

Table 22. Perceived price changes in travel

Since the outbreak of the pandemic ...	Mean	SD
Hospitality service costs have increased	5.01	1.49
Travel costs have increased	4.77	1.63
I have taken advantage of restaurant deals	3.74	1.84
I am prepared to pay more for travel	3.38	1.75
I have taken advantage of travel deals	3.23	1.85
Overall mean	4.03	1.71

7.7 Travel information

Respondents ranked the travel-related statements from the most important to least important (see Table 23). Results show that the most important information to receive prior to traveling is trustworthy information and communication from destination's government regarding the infection and mortality rate, followed by the level of transparency and openness of the local government regarding their COVID-19 communication. Respondents were less concerned about receiving convincing information about COVID-19 in general.

Table 23. COVID-19 communication

Please rank these statements in terms of their importance to you before you travel.
1. Trustworthiness of the information and communication provided by the government of the destination about the infection and mortality rate of COVID-19
2. How open and transparent the government (State or Federal) of the destination has been since the beginning of the COVID-19 outbreak
3. How honest the government of the destination has been in its response to COVID-19
4. How well the government of the destination has performed in its response to COVID-19
5. That I receive comprehensive information about COVID-19
6. That I receive up-to-date information about COVID-19
7. That I receive convincing information about COVID-19

7.8 Service expectations

Overall, respondents show a moderate and similar level of expectations towards various service aspects (M = 4.76, SD = 1.52) (see Table 24). Results show that a live service person positively affects service quality (M = 5.02) and the service's human contact part is enjoyable (M = 4.55). Respondents are not against using technology if service costs decrease (M = 4.89) or if it results in quicker service delivery (M = 4.87). However, respondents indicate that the quality of service has declined since the pandemic (M = 4.59). More frequent business travelers report higher service expectations than less frequent business travelers as would be expected.

Table 24. Service expectations

Please indicate your level of agreement with the following statements about your service expectations when you are traveling.	Mean	SD
Service is of higher quality if it is delivered by a live service person	5.02	1.53
Willing to put up with more technology if it brings the cost of service down	4.89	1.50
Willing to put up with more technology if it makes service faster	4.87	1.47
Personal attention by service employees is very important to me	4.73	1.56
Prefer interacting with the person who provides the service	4.66	1.46
Tourism and hospitality services' quality have declined since the pandemic	4.59	1.51
Human contact makes the process enjoyable for me	4.55	1.62
Overall mean	4.76	1.52

7.9 Use of virtual reality (VR)

Most respondents (77%) have not used virtual reality (e.g., virtual tours) to help make travel decisions. Among respondents (23%) who used VR to make travel decisions, they show a relatively positive overall attitude and behavior intentions toward use of VR (M = 4.65, SD = 1.74) (see Table 25). This mindset includes being interested in VR use in tourism (M = 4.81), recommending VR to others (M = 4.76), willingness to pay for VR applications (M = 4.25), and using VR in future travel (M = 4.69). They also indicate that VR will enhance their travel experience (M = 4.75).

Table 25. Virtual reality (VR) use

Use of virtual reality (VR)	Mean	SD
Very interested in virtual reality (VR) use in tourism	4.81	1.73
Recommend VR applications to others for tourism purposes	4.76	1.72
VR applications will enhance my traveling experience	4.75	1.68
Intend to use VR applications in the future for tourism purposes such as checking out a destination or hotel	4.69	1.67
Willing to pay to use VR applications in tourism (e.g., a 360-degree virtual tour of a famous tourist destination	4.25	1.89
Overall mean	4.65	1.74

7.10 Expectation of travel accommodations

Respondents have high expectations of travel accommodations for future travel. Results show travelers expect accommodations to follow various safety measures and hygiene standards (M = 5.71, SD = 1.55) (see Table 26). Mostly, respondents expect frontline employees to be in good health condition (M = 6.02) and display respiratory etiquette (M = 5.87). Disinfection of the guestrooms are also of high importance (M = 6.00). Amenities, such as hand sanitizers are expected to be provided in public spaces (M = 5.87) and guestrooms (M = 5.86). Respondents also indicate that they prefer frontline employees to be vaccinated (M = 5.44). Respondents who will consider international travel in the foreseeable future report a lower expectation level for travel accommodations compared to those who will not travel overseas anytime soon.

Table 26. Expectation of travel accommodations

When traveling in the future, I expect the following when I stay in accommodations ...	Mean	SD
Front-line employees to be in good health condition	6.02	1.40
Disinfection of guest rooms before arrival	6.00	1.52
Front-line employees to display respiratory etiquette (e.g., covering mouth and nose with bent elbow or tissue when coughing or sneezing)	5.87	1.59
Dispensers of hand sanitizer in public spaces	5.87	1.39
Hand sanitizers in guest rooms	5.86	1.45
Staff using personal protective equipment (e.g., disposable gloves, face mask, eye goggles)	5.62	1.57
Capacity limits to allow social distancing	5.57	1.62
Rooms with windows providing natural air flow	5.47	1.51
Front-line employees to be vaccinated	5.44	1.73
Other guests using personal protective equipment	5.35	1.68
Overall mean	5.71	1.55

7.11 Health communication from accommodations

Respondents indicate that they have relatively high expectations in terms of health communication from their choice of accommodations (M = 4.77, SD = 1.75) (see Table 27). These communications include relevant certification (M = 5.20), public signage (M = 5.19), multilingual brochures in guestrooms (M = 4.68), health screening surveys at check-in (M = 4.45), and a mandatory digital health passport (M = 4.33). Respondents who will consider international travel in the foreseeable future have a higher expectation of health communication from accommodations compared to those who will not travel overseas anytime soon.

Table 27. Health communication from accommodations

When staying in accommodations in the future, I would like to see ...	Mean	SD
Hotel certification for preventing and controlling infectious diseases	5.20	1.67
Information signs in public areas reminding guests to be cautious about infectious diseases	5.19	1.64
Multilingual brochures on safety and security precautions in guest rooms	4.68	1.64
A health questionnaire with infectious diseases screening questions as part of the check-in process	4.45	1.83
A requirement to provide a digital health passport	4.33	1.99
Overall mean	4.77	1.75

7.12 Technology adoption in accommodations

Findings suggest a relatively neutral preference towards technology adoption in accommodations in their future travels (M = 4.10, SD = 1.74) (see Table 28). Results show a slightly positive attitude towards technologies such as self-service technology (M = 4.64), voice control elevator (M = 4.39), and voice control in-room system (M = 4.34). However, respondents are reluctant to use robot services, such as robot butlerS (M = 3.58) or cleaning robots (M = 3.57).

Table 28. Technology adoption in accommodations

When staying in accommodations in the future, I would like to see ...	Mean	SD
A voice control system to operate the in-room amenities (e.g., room temperature, lighting, TV, curtain, guest room door)	4.34	1.73
Robot butlers performing guest services	3.58	1.79
Robots performing cleaning services	3.57	1.82
Overall mean	4.10	1.74
Self-service technology for check-in and out (e.g., kiosks, in-room check-out system through TV and smartphones)	4.64	1.65
A voice control system to operate the elevator	4.39	1.70

7.13 Travel anxiety

Overall, respondents indicate that they have a moderate to moderately high level of anxiety towards travel (M = 4.63, SD =1.80) (see Table 29). Concerns making them more anxious include trying to minimize infection risk (M = 5.56) and seeking COVID-19 information before traveling (M = 5.28). Looking at respondents who indicate having travel anxiety (Mean > 4), their attitude and expectations differ from those who don't experience travel anxiety (Mean ≤4). Respondents who do not experience travel anxiety show a lower propensity for mindful traveling behaviors (M = 3.98, t(508) = -10.78, p<.001), a lack of abstinence towards traveling (M = 3.62, t(508) = -13.84, p<.001), perceived less general impact of COVID-19 (M = 3.23, t(508) = -17.63, p<.001), have less expectation of health communication from accommodations (M = 3.55, t(508) = -17.26, p<.001), less expectation of technology adoption in accommodations (M = 3.21, t(508) = -11.71, p<.001), and tend not to avoid technology (M = 3.46, t(508) = -4.54, p<.001).

Table 29. Travel anxiety

Travel anxiety	Mean	SD
I will try to minimize the risk of infection during travel	5.56	1.55
I will seek COVID-19 information before I travel	5.28	1.71
COVID-19 makes me worry a lot about my normal methods of traveling	4.53	1.82
Thinking about COVID-19 makes me uncomfortable while planning my vacation	4.38	1.79
I do not feel safe traveling because of COVID-19	4.24	1.89
I will buy travel insurance that covers COVID-19 related travel problems	4.23	1.94
When watching news reports about COVID-19, I become nervous or anxious regarding travel	4.21	1.88
Overall mean	4.63	1.80

7.14 Technology avoidance

Respondents generally do not avoid technology in travel (M = 3.92, SD = 1.81) (see Table 30). They indicate a neutral level of feeling apprehensive about using new technology (M = 4.01), do not avoid unfamiliar technology (M = 4.00), or hesitate to use technology due to potential mistakes (M = 3.74). Respondents who indicate that they will consider international travel in the foreseeable future tend to embrace new technologies (M = 3.78, t(508) = 2.00, p<.05) compared to those who will not travel overseas anytime soon (M=4.07).

Table 30. Technology avoidance

Technology avoidance	Mean	SD
Feel apprehensive about using technology that is new to me	4.01	1.80
Typically avoid technology that is unfamiliar to me	4.00	1.82
Hesitate to use most forms of technology for fear of making mistakes I cannot correct	3.74	1.81
Overall mean	3.92	1.81

7.15 Future travel intentions

Almost one-half (48%) of respondents report that they will not consider international travel in the foreseeable future, and about 18% of the respondents will consider international travel after a year. Interestingly, when making travel plans, most respondents (86%) will consider how well the destination they are considering handled the pandemic. Respondents also indicated a moderate preference for staying at private properties (M = 4.68) and preparing their own food (M = 4.55) (see Table 31). However, they are not reluctant to visit cafés or bars (M = 3.93), stay at paid accommodation (M = 3.69), or sit and eat in a restaurant (M = 3.65).

Table 31. Future travel intention

Due to COVID-19, I ...	Mean	SD
Prefer to stay in a property that I own or with friends and relatives	4.68	1.81
Prefer to prepare my own food (e.g., meals, drinks, etc.)	4.55	1.80
Reluctant to sit in a café/bar due to COVID-19	3.93	2.05
Afraid to stay in paid accommodation	3.69	1.91
Reluctant to sit and eat in a restaurant	3.65	2.03

7.16 Travel preferences

For travel preferences since the COVID-19 pandemic, respondents suggest that they are more likely to travel with their families (M = 5.80) and travel to familiar destinations (M = 5.72) (see Table 32). However, they are not more likely to take cruises (M = 2.90), religious/spiritual vacations (M = 3.43), organized tours (M = 3.58), special events (M = 3.77), sport/activity vacations (M = 3.85), or wellness holidays (M = 3.97).

Table 32. Travel preference

Since the COVID-19 pandemic, are you more likely to...	Mean	SD
Travel with my family	5.80	2.20
Travel to a destination I am familiar with	5.72	2.14
Visit a national park	5.20	2.21
Stay at a hotel	5.13	2.19
Travel on my own	4.92	2.43
Choose a self-catering location (e.g., Airbnb, a vacation home, etc.) to stay in over a hotel	4.10	2.34
Stay at an all-inclusive resort	4.04	2.21
Go on a health and wellness vacation	3.97	2.19
Go on a sporting/activity holiday	3.85	2.30
Travel to watch an event (e.g., sporting, music, etc.)	3.77	2.35
Travel with an organized tour	3.58	2.20
Go on a religious or spiritual vacation	3.43	2.23
Go on a cruise vacation	2.90	2.22
Overall mean	4.34	2.25

8. Conclusions and recommendations

The results from the first stage of this project show that hospitality and tourism providers worldwide have made six key adaptations to the COVID-19 pandemic: creating new products and services, refocusing target markets, redesigning communication strategies, formulating new financial models, adapting to new technology, and developing their human resource management strategies. Examples of these adaptations included pivoting to focus on domestic tourists, implementing health and safety protocols, using social media to communicate more effectively with both staff and customers, investing in technology and innovation, and retraining employees to prepare them for new post-pandemic norms.

In-depth interviews of practitioners confirm these findings. Most stakeholders report that their organizations pivoted and adapted quickly to the pandemic. A proactive stance led to developing and implementing new health protocols that protected both staff and customers. They also utilized social media to remain in constant communication with their customers and employees. In general, practitioners implemented creative ways to bring in more business, but support from the government and industry associations helped them navigate through the pandemic. As businesses reopened, demand increased; however, employee shortages adversely affected operations.

The executive survey's results show that respondents generally rate their organization's adaptation performance during the pandemic as high. Adaptations were more likely to be made to human resource management policies, communications strategies and for the adoption of new technology, than for financial models or new markets. As found in the interviews, support from government and industry associations was critical in helping organizations survive the pandemic. Most executives agree that the pandemic sped up innovations, with the majority introducing 'low-touch' digital technologies. The main service or product adaptations relate to new hygiene protocols. To decrease operational costs, organizations had to lay off or furlough their employees, but as customer demand started to return, respondents found difficulty recruiting staff with the necessary skills for the 'new normal' such as customer service, adaptability, and flexibility.

The survey of American consumers shows that travelers are more cautious than before. Post-pandemic, consumers report a top priority will be public health conditions and hygiene standards at destinations, hotels, and attractions. Today's travelers are avoiding cities and congested areas, preferring to drive to destinations rather than fly, and choosing destinations where social distancing is easier. In the future they are more likely to travel with their families, and visit familiar destinations. Respondents say they are less likely to take cruises, go on religious/spiritual vacations, organized tours, or attend special events. Most respondents believe that the pandemic has increased hospitality and travel costs, and they are reluctant to pay more for travel. They also feel that service quality overall has declined. Regarding new technologies adopted during the pandemic, respondents are not against using technology if service costs decrease or the result is a quicker service delivery. About one-half of the travelers surveyed will not consider international travel in the foreseeable future. Those respondents who are willing to venture abroad seem to be more resilient and are less anxious about traveling in general; however, they will choose destinations based on how these destinations have handled the pandemic.

Recommendations

What can we learn from the results of this study? Clearly, the data confirms that adaptation is critical for survival during a crisis (Girneata, 2014), and those that were able to adapt quickly gained a competitive advantage (Reeves & Deimler, 2011). Because consumer demands and behavior have been altered by the pandemic, all stakeholders in the travel industry will need to adapt. Some of these changes in travel will be more permanent than others. At the moment, consumers are staying closer to home and using their own transport – they are also favoring private accommodation. Some trends are likely to be temporary – as international tourism resumes, travelers will venture further afield. But other changes are here to stay. Technology adoption in the tourism sector has accelerated during this crisis, allowing companies to offer lower-touch and more personalized, customized experiences – this development will stay. Organizations will therefore have to embrace technological changes in order to prosper, and executives need to recognize technology's strategic importance as a critical component of the business, not just a source of cost efficiencies.

The emphasis on health and safety will also be permanent. As this study highlights, future travelers will be more cautious than before, and so the public health conditions and hygiene standards of tourism and hospitality providers need to become a top priority. Research conducted during the pandemic by Oliver Wyman (2021) confirms that cleanliness is now the most important factor (after price) that impacts the decision to stay at a hotel. Tourism and hospitality providers should continue promoting their health and safety efforts to address travelers' ongoing safety concerns. This strategy offers a compound benefit to the service provider. The consumer survey results support the proposition that destinations prioritizing health over wealth are likely to experience a 'halo effect', resulting from the positive media that they have received in dealing with the crisis and for being perceived as relatively 'COVID-free'.

This study also supports current research that suggests that customers post-pandemic (across all sectors) have higher expectations than ever before (Netomi, 2021; Stella Connect, 2021). Becoming customer-centered and exceeding customer expectations are critical for long-term business success. Organizations will also need to offer greater perceived value. Travelers report that they are seeing an increase in hospitality and travel costs, but they are reluctant to pay more, particularly as they perceive service standards to have fallen. Organizations also need to promote the benefits of new technology as travelers are only amenable to new technology if service costs decrease or if the service delivery is quicker.

A critical concern is the difficulty recruiting staff with the necessary skills for the 'new normal' such as customer service, adaptability, and flexibility. Addressing such skills shortages in the tourism and hospitality sector will be crucial post-pandemic, given the significance of the industry to many national economies. Interest in working in the tourism and hospitality industry has already been impacted due to job security fears - with redundancies and high-profile job losses reported throughout the pandemic. A recent survey of 25,000 job seekers in the US reports one-third of hospitality workers are "dissatisfied" or "very dissatisfied" with their jobs, twice pre-pandemic levels (Joblist, 2021). This attitude poses a serious problem for recovery of this sector, as expertise and knowledge are needed more than ever to cope with the post-pandemic world. Government policy and individual organizations must therefore address these workforce development issues as a priority.

Another important lesson from this pandemic - highlighted by this study – is that keeping open lines of communication to all stakeholders during a crisis is crucial. From safari operators in South Africa sending WhatsApp messages to customers in key markets, to Dubai's marketers working with influencers to promote the city to Israelis, organizations understood the need to change both their methods of communication, and their tone of message as the crisis unfolded. Organizations that remained vocal during the crisis likely will recover faster than others, having communicated to consumers the image of corporate stability during challenging times, and maintained or even increased 'share of mind'.

Finally, although many governments did respond well to support the tourism and hospitality industry in the wake of the pandemic, the majority were not prepared for the crisis. A need exists to have recovery plans in place to address future crises. These recovery plans need to include sector-specific policies to support the tourism and hospitality industry, as well as policies in place to support small businesses and informal workers, many of whom fell through the cracks as far as support was concerned during this pandemic. Organizations surveyed in this study relied heavily on support from government and industry associations to survive the COVID-19 pandemic. For many businesses though, this support was not enough. The crisis has highlighted the fragility of the tourism and hospitality sector. Now is the time to reevaluate the industry's structural inadequacies and to create a more stable business model. For many businesses, the pay structure needs to change. The industry suffers from the overreliance on cheap labor. As Rao (2021) suggests, hospitality services are at an inflection point and the time has come to 'reimagine hospitality' post-COVID, making the industry a safer, fairer place to work, with higher wages, comprehensive benefits, and stronger support systems for workers.

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Appendix 10.1 Executive survey

How long have you worked in the tourism or hospitality industry?

How long have you worked in your current organization?

Were you furloughed during the pandemic?
☐ Yes. If yes, please specify how long.____________________
☐ No

Was your business temporarily closed?
☐ Yes. If yes, please specify how long. __________________________
☐ No

What is your current position?
☐ General Manager
☐ Human Resource Manager
☐ Supervisor
☐ Department Manager
☐ Assistant Manager
☐ Other, please specify ____

Which sector of the industry do you currently work in?
☐ Lodging
☐ Food & Beverage
☐ Clubs (social clubs, golf clubs, etc.)
☐ Attraction/ Recreation (parks, zoos, museums, sports, events, etc.)
☐ Other, please specify ____

Please indicate your level of agreement with the following statements about how your organization adapted to COVID-19.

The layout of public spaces (lobby, common areas, restaurant, etc.) was modified to allow social distancing.	☐ agree	☐ disagree
The health of your guests was monitored during their visit.	☐ agree	☐ disagree
New cleaning and disinfection protocols were implemented.	☐ agree	☐ disagree
New food preparation and serving protocols were implemented.	☐ agree	☐ disagree
More active measures for the use of contactless digital technologies (digital keys, digital payment, mobile payment, digital interactions, etc.) were introduced.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements about how your organization adapted to COVID-19.

The facilities have been used as a place to welcome employees from the health sector.	☐ agree	☐ disagree
Food surpluses have been donated (to employees or NGOs) due to the closure of the establishment.	☐ agree	☐ disagree
Meeting spaces have been used for other purposes.	☐ agree	☐ disagree
Our organization has taken advantage of the demand for "workations" (people wanting to work away from home).	☐ agree	☐ disagree
Our hours of our operation were reduced.	☐ agree	☐ disagree

Others, please specify.____________________________________

Please indicate your level of agreement with the following statements regarding your organization's general level of service innovation.

Innovation is an important part of our organizational culture.	☐ agree	☐ disagree
Our organization's top management gives special emphasis to service innovation.	☐ agree	☐ disagree
Our organization constantly seeks new ways to better service our customers.	☐ agree	☐ disagree
Our organization is able to modify our current service approaches to meet special requirements from customers.	☐ agree	☐ disagree
Our organization usually follows our closest competitors when introducing new service offerings.	☐ agree	☐ disagree
Our organization invests in human resources for innovation in services.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding your organization's general level of service innovation.

Our organization invests in human resources for innovation in services.	☐ agree	☐ disagree
Our organization often lacks the capital investment to develop new services.	☐ agree	☐ disagree
Our organization creates a risk-free environment for our guests.	☐ agree	☐ disagree
Our organization creates a risk-free environment for our employees.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding your organization's marketing strategies during the pandemic.

We frequently promoted special offers.	☐ agree	☐ disagree
We rarely offered discounts in order to attract customers.	☐ agree	☐ disagree
Our promotional messages specifically focused on health and safety.	☐ agree	☐ disagree
We aggressively promoted our new products.	☐ agree	☐ disagree
We actively targeted new customer segments.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding your organization's marketing strategies during the pandemic.

We reduced joint campaigns with local merchants.	☐ agree	☐ disagree
We reduced joint campaigns with other partners.	☐ agree	☐ disagree
We used more media channels than normal to promote our products.	☐ agree	☐ disagree
We decreased the bundling of products.	☐ agree	☐ disagree
Please indicate your level of agreement with the following statements regarding your organization's general level of marketing innovation.	☐ agree	☐ disagree
Management actively seeks innovative marketing ideas.	☐ agree	☐ disagree
Improvements in product or service design are readily accepted by management.	☐ agree	☐ disagree
Improvements in product promotional activities are readily accepted by management.	☐ agree	☐ disagree
Changes in product pricing are readily accepted by management.	☐ agree	☐ disagree
The pandemic has sped up the adoption of innovations (e.g., keyless entry, takeout service).	☐ agree	☐ disagree
New marketing ideas are perceived as too risky.	☐ agree	☐ disagree
Please indicate your level of agreement with the following statements.	☐ agree	☐ disagree
During the pandemic, our organization encouraged our managers…	☐ agree	☐ disagree
To frequently speak with employees to find out how they were experiencing the crisis.	☐ agree	☐ disagree
To talk to employees to ensure they felt safe.	☐ agree	☐ disagree
To actively keep employees up to date about COVID-19.	☐ agree	☐ disagree
To talk to employees regularly to see if they were coping.	☐ agree	☐ disagree
To comfort employees.	☐ agree	☐ disagree
To actively look for information to help employees during the COVID-19 pandemic.	☐ agree	☐ disagree
To frequently use text, e-mails and telephone or online methods to communicate with employees.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.
During the pandemic, our organization…

Decreased communications to customers during the pandemic.	☐ agree	☐ disagree
Spent more money than usual on advertising to customers during the pandemic.	☐ agree	☐ disagree
Communicated effectively to consumers an image of corporate stability during the pandemic.	☐ agree	☐ disagree
Changed the tone of message (e.g., "stay safe" rather than "come and visit") as the crisis unfolded.	☐ agree	☐ disagree
Changed marketing messages to fit new consumer preferences (e.g. promoting activities outside or promoting health and safety).	☐ agree	☐ disagree

Did you take advantage of government support to mitigate the effects of the crisis on your business in the following form:

Government Support
☐ Yes ☐ No

Fiscal Support (e.g. loans, stimulus money, tax breaks, etc.)
☐ Yes ☐ No

Policies to support jobs and trainings
☐ Yes ☐ No

Initiatives to restart tourism and promote domestic demand
☐ Yes ☐ No

During the pandemic, did you take advantage of support from industry associations like South Carolina Restaurant and Lodging Association (SCRLA) in the following form:

Industry Association Support
☐ Yes ☐ No

Educational Webinars
☐ Yes ☐ No

Up-to-date information on how the pandemic and associated legislation was affecting my business
☐ Yes ☐ No

Up-to-date information on applying for support/funds
☐ Yes ☐ No

Small business counseling
☐ Yes ☐ No

Restaurant revitalization funds
☐ Yes ☐ No

Please indicate your level of agreement with the following statements.
During the pandemic, our organization...

Delayed capital improvements.	☐ agree	☐ disagree
Postponed maintenance plans.	☐ agree	☐ disagree
Purchased lower-priced supplies.	☐ agree	☐ disagree
Cut costs by closing less-used facilities.	☐ agree	☐ disagree
Significantly reduced range of services.	☐ agree	☐ disagree
Added alternative revenue sources (eg. delivery and to-go options).	☐ agree	☐ disagree
Asked managers and employees to take on extra responsibilities.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.

My organization had adequate resources to withstand the COVID-19 crisis.	☐ agree	☐ disagree
My organization had access to adequate finances to help it overcome the COVID-19 crisis.	☐ agree	☐ disagree
The diverse customer base of my organization will aid it in overcoming the COVID-19 crisis.	☐ agree	☐ disagree
The size of my business will help it overcome the COVID-19 crisis.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding human resource adaptation. During the pandemic, our organization...

Reduced the labor force by laying off employees.	☐ agree	☐ disagree
Reduced the labor force by asking employees to take unpaid vacation.	☐ agree	☐ disagree
Reduced the number of office hours or working days.	☐ agree	☐ disagree
Reduced pay rates.	☐ agree	☐ disagree
Replaced high-tenure employees with new employees.	☐ agree	☐ disagree
Increased reliance on outsourced human resources.	☐ agree	☐ disagree
Provided voluntary early retirement or resignation plans.	☐ agree	☐ disagree
Reduced the labor force by furloughing employees.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding human resource adaptation. During the pandemic, our organization...

Expressed concerned about employees' daily lives.	☐ agree	☐ disagree
Made an extra effort to meet staff resource needs for safety in COVID-19 prevention.	☐ agree	☐ disagree
Appeased staffs' negative emotions.	☐ agree	☐ disagree
Showed consideration for employees' physical safety.	☐ agree	☐ disagree
Showed consideration for employees' psychological safety.	☐ agree	☐ disagree
Made a strong effort to create a safe workplace.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.
During the pandemic, my organization...

Provided face-to-face or online training to prepare employees for the "new normal".	☐ agree	☐ disagree
Provided webinars to communicate with employees during the pandemic.	☐ agree	☐ disagree
Created completely new roles for employees (health and safety officer, well-being director, etc.) in response to the pandemic.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.
Since the COVID-19 pandemic, our organization has had difficulty ...

Recruiting staff with the necessary experience.	☐ agree	☐ disagree
Promoting from within because of a lack of experience.	☐ agree	☐ disagree
Recruiting staff with the required educational qualifications.	☐ agree	☐ disagree
Retaining staff.	☐ agree	☐ disagree
Attracting young people to work in the tourism/hospitality/restaurant industry.	☐ agree	☐ disagree
Managing employee absenteeism.	☐ agree	☐ disagree

What specific skills do you think employees will need in the tourism and hospitality sector post-pandemic?

Flexibility	☐ agree	☐ disagree
Adaptability	☐ agree	☐ disagree
Customer service skills	☐ agree	☐ disagree
Proficiency with technology	☐ agree	☐ disagree
Experience in multiple job roles	☐ agree	☐ disagree
Crisis recovery skills	☐ agree	☐ disagree
Coping with more demanding customers	☐ agree	☐ disagree
Other, please specify	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding technology changes during the pandemic.

The technology used in our industry has changed rapidly during the pandemic.	☐ agree	☐ disagree
Technological change during the pandemic has provided important business opportunities.	☐ agree	☐ disagree
Technological changes have opened new channels in which to access our customers.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding the use of technology adaptation for customers. During the pandemic, our organization implemented new or more technology to...

Communicate with customers.	☐ agree	☐ disagree
Benefit from customers' feedback.	☐ agree	☐ disagree
Respond to customers' needs.	☐ agree	☐ disagree
Provide new services to customers.	☐ agree	☐ disagree
Engage with consumers remotely while they could not travel using tools like virtual reality.	☐ agree	☐ disagree
Provide contactless services during the pandemic (using Apps etc). Implement new health and safety protocols.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements. During the pandemic, our organization...

Performed well in finding new markets for our products.	☐ agree	☐ disagree
Performed well in adapting our communications.	☐ agree	☐ disagree
Performed well in adapting our financial models.	☐ agree	☐ disagree
Performed well in adopting new technology.	☐ agree	☐ disagree
Quickly established safety regulations related to COVID-19 prevention.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements. During the pandemic, our organization...

Requested that staff obey regulations of safety management related to COVID-19 prevention.	☐ agree	☐ disagree
Established a safety responsibility system.	☐ agree	☐ disagree
Regularly monitored the employees' safety performance.	☐ agree	☐ disagree
Mandated that employees be vaccinated before coming back to work.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding strategies for the future. In the future, my organization will focus on...

Seeking new opportunities.	☐ agree	☐ disagree
Recovery plans.	☐ agree	☐ disagree
Revenue management in other revenue-generating departments.	☐ agree	☐ disagree
Cost management.	☐ agree	☐ disagree
Training of employees.	☐ agree	☐ disagree
Local markets.	☐ agree	☐ disagree
Ensuring we are a more flexible and nimble organization.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding strategies for the future. In the future, my organization will focus on

Sustainability.	☐ agree	☐ disagree
Health and safety.	☐ agree	☐ disagree
New technology.	☐ agree	☐ disagree
A low-touch economy	☐ agree	☐ disagree
Resilience.	☐ agree	☐ disagree
More collaboration.	☐ agree	☐ disagree

How important do you think are the following strategies for attracting employees post-pandemic? Please rank the following strategies. (Please hold and drag each item to rank them)

______ Offering higher salaries.
______ Offering better benefit packages.
______ Offering educational opportunities.
______ Providing an attractive work environment.
______ Promoting a strong organizational culture.
______ Offering flexible working time/schedules.

What type of crisis or disaster recovery strategy did your organization have before the pandemic? Please select all that applies.

☐ Natural disasters ☐ Man-made disasters ☐ Pandemic disasters

Will your organization have a crisis recovery strategy in place post-pandemic?

☐ Yes ☐ No ☐ I don't know.

Please indicate your location in South Carolina.

☐ Upstate ☐ Pee Dee ☐ Midlands ☐ Lowcountry

Please select your gender identity.

☐ Male ☐ Female ☐ Non-binary

Please select your age range.
☐ 18-34 years old ☐ 35-54 years old ☐ Above 55 years old

Please select your ethnicity.
☐ Caucasian ☐ African-American ☐ Hispanic ☐ Asian ☐ Native American ☐ Multi-racial
☐ Other (Please specify) ______________________________

Please select the highest level of education you have completed.

☐ High school degree or lower
☐ Some college or Associate degree
☐ Bachelor's degree
☐ Master/Doctorate degree

Appendix 10.2 Consumer survey

Generally, how many overnight trips do you take each year for leisure?

☐ 0 times
☐ 1-3 times
☐ 4 or more times

Generally, how many overnights trips do you take each year for business?

☐ 0 times
☐ 1-3 times
☐ 4 or times

Please indicate your level of agreement with the following statements. Since the COVID-19 pandemic, I am more likely to ...

Visit nature-based destinations.	☐ agree	☐ disagree
Drive to destinations.	☐ agree	☐ disagree
Travel domestically and regionally.	☐ agree	☐ disagree
Avoid multiple-stop trips.	☐ agree	☐ disagree
Stay in one area and take short excursions from that base.	☐ agree	☐ disagree
Staycation (take day trips from home).	☐ agree	☐ disagree
Choose destinations where social distancing is easy.	☐ agree	☐ disagree
Travel during the off-season.	☐ agree	☐ disagree
Avoid congested areas.	☐ agree	☐ disagree
Reduce travel activities.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements. Since the COVID-19 pandemic, I am more likely to ...

Choose more sustainable travel.	☐ agree	☐ disagree
Choose more experiential travel.	☐ agree	☐ disagree
Have a greater appreciation of my travel experiences.	☐ agree	☐ disagree
Be aware of the behavioral consequences of my travel.	☐ agree	☐ disagree
Prefer travel that respects local communities and people.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements. Since the COVID-19 pandemic, I am more likely to ...

Postpone or cancel travel plans.	☐ agree	☐ disagree
Refrain from air travel.	☐ agree	☐ disagree
Avoid traveling to large cities.	☐ agree	☐ disagree
Shorten the duration of my trips.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.

I easily adapt to changes in my travel plans.	☐ agree	☐ disagree
I always deal comfortably with whatever comes in travel.	☐ agree	☐ disagree
I rarely see the humorous side of travel problems.	☐ agree	☐ disagree
I can cope with the stress involved in travel.	☐ agree	☐ disagree
I can handle unpleasant feelings in travel.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.

COVID-19 has changed my hygiene standards.	☐ agree	☐ disagree
COVID-19 has made me fearful.	☐ agree	☐ disagree
COVID-19 has increased my anxiety level.	☐ agree	☐ disagree
COVID-19 has made me reconsider my way of life.	☐ agree	☐ disagree
COVID-19 has no affect on my everyday life.	☐ agree	☐ disagree

Since the outbreak of the pandemic ...

I have taken advantage of travel deals.	☐ agree	☐ disagree
I have taken advantage of restaurant deals.	☐ agree	☐ disagree
I am prepared to pay more for travel.	☐ agree	☐ disagree
Travel costs have increased.	☐ agree	☐ disagree
Hospitality service costs have increased.	☐ agree	☐ disagree

Please RANK THESE STATEMENTS in terms of their importance to you before you travel. (Please hold and drag each item to rank them.)

______ Trustworthiness of the information and communication provided by the government of the destination about the infection and mortality rate of COVID-19
______ How open and transparent the government (State or Federal) of the destination has been since the beginning of the COVID-19 outbreak.
______ How honest the government of the destination has been in its response to COVID-19.
______ How well the government of the destination has performed in its response to COVID-19.
______ That I receive comprehensive information about COVID-19.
______ That I receive up-to-date information about COVID-19.
______ That I receive convincing information about COVID-19.

Please indicate your level of agreement with the following statements about your service expectations when you are traveling.

Human contact makes the process enjoyable for me.	☐ agree	☐ disagree
I prefer interacting with the person who provides the service.	☐ agree	☐ disagree
Personal attention by service employees is very important to me.	☐ agree	☐ disagree
Service is of higher quality if it is delivered by a live service person.	☐ agree	☐ disagree
I am willing to put up with more technology if it brings the cost of service down.	☐ agree	☐ disagree
I am willing to put up with more technology if it makes service faster.	☐ agree	☐ disagree
Tourism and hospitality services' quality have declined since the pandemic.	☐ agree	☐ disagree

Have you used virtual reality (e.g., virtual tours) to help make previous travel decisions?

☐ Yes ☐ No

Please indicate your level of agreement with the following statements.

I am very interested in virtual reality (VR) use in tourism.	☐ agree	☐ disagree
I intend to use VR applications in the future for tourism purposes	☐ agree	☐ disagree
such as checking out a destination or hotel.	☐ agree	☐ disagree
I recommend VR applications to others for tourism purposes.	☐ agree	☐ disagree
I am willing to pay to use VR applications in tourism (e.g., a 360-degree virtual tour of a famous tourist destination).	☐ agree	☐ disagree
VR applications will enhance my traveling experience.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.
When traveling in the future, I expect the following when I stay in accommodations ...

Disinfection of guest rooms before arrival.	☐ agree	☐ disagree
Front-line employees to be in good health condition.	☐ agree	☐ disagree
Front-line employees to be vaccinated.	☐ agree	☐ disagree
Front-line employees to display respiratory etiquette	☐ agree	☐ disagree
(e.g., covering mouth and nose with bent elbow or tissue when coughing or sneezing).	☐ agree	☐ disagree
Hand sanitizers in guest rooms. Capacity limits to allow social distancing.	☐ agree	☐ disagree
Staff using personal protective equipment (e.g., disposable gloves, face mask, eye goggles).	☐ agree	☐ disagree
Rooms with windows providing natural air flow.	☐ agree	☐ disagree
Other guests using personal protective equipment.	☐ agree	☐ disagree
Dispensers of hand sanitizer in public spaces.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.
When staying in accommodations in the future, I would like to see ...

Multilingual brochures on safety and security precautions in guest rooms.	☐ agree	☐ disagree
A health questionnaire with infectious diseases screening questions as part of the check-in process.	☐ agree	☐ disagree
Information signs in public areas reminding guests to be cautious about infectious diseases.	☐ agree	☐ disagree
A requirement to provide a digital health passport.	☐ agree	☐ disagree
Hotel certification for preventing and controlling infectious diseases.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.
When staying in accommodations in the future, I would like to see ...

A voice control system to operate the elevator.	☐ agree	☐ disagree
A voice control system to operate the in-room amenities (e.g., room temperature, lighting, TV, curtain, guest room door).	☐ agree	☐ disagree
Self-service technology for check-in and out (e.g., kiosks,	☐ agree	☐ disagree
in-room check-out system through TV and smartphones).	☐ agree	☐ disagree
Robot butlers performing guest services.	☐ agree	☐ disagree
Robots performing cleaning services.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.

COVID-19 makes me worry a lot about my normal methods of traveling.	☐ agree	☐ disagree
Thinking about COVID-19 makes me uncomfortable while planning my vacation.	☐ agree	☐ disagree
When watching news reports about COVID-19, I become nervous or anxious regarding travel.	☐ agree	☐ disagree
I do not feel safe traveling because of COVID-19.	☐ agree	☐ disagree
I will try to minimize the risk of infection during travel.	☐ agree	☐ disagree
I will seek COVID-19 information before I travel.	☐ agree	☐ disagree
I will buy travel insurance that covers COVID-19 related travel problems.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements.

I feel apprehensive about using technology that is new to me.	☐ agree	☐ disagree
I typically avoid technology that is unfamiliar to me.	☐ agree	☐ disagree
I hesitate to use most forms of technology for fear of making mistakes I cannot correct.	☐ agree	☐ disagree

Please indicate your level of agreement with the following statements regarding your future travel intentions.
Due to COVID-19, I ...

am reluctant to sit and eat in a restaurant.	☐ agree	☐ disagree
am reluctant to sit in a café/bar due to COVID-19.	☐ agree	☐ disagree
Prefer to prepare my own food (e.g., meals, drinks, etc.).	☐ agree	☐ disagree
am afraid to stay in paid accommodation.	☐ agree	☐ disagree
Prefer to stay in a property that I own or with friends and relatives.	☐ agree	☐ disagree
When will you consider international travel?	☐ agree	☐ disagree

If you were to travel abroad in the future, would you consider how well countries have done in dealing with the pandemic when you chose your destination?

☐ Yes ☐ No

Since the COVID-19 pandemic, are you more or less likely to ...

☐ Go on a cruise vacation.
☐ Stay at an all-inclusive resort.
☐ Choose a self-catering location (e.g., Airbnb, a vacation home, etc.) to stay in over a hotel
☐ Stay at a hotel.
☐ Travel with an organized tour.
☐ Travel with my family.
☐ Travel on my own.
☐ Travel to a destination I am familiar with.
☐ Go on a sporting/activity holiday.
☐ Visit a national park.
☐ Go on a health and wellness vacation.
☐ Go on a religious or spiritual vacation.
☐ Travel to watch an event (e.g., sporting, music, etc.).

Please indicate your residency zip code. ___________________

What is your gender?

☐ Male
☐ Female
☐ Non-binary
☐ Prefer not to say

In what year were you born? ____________________

What is your marital status?

☐ Single ☐ Married
☐ Widowed/ Divorced/ Separated

What is your ethnic group?

☐ Caucasian ☐ African-American ☐ Hispanic
☐ Asian ☐ Native AMerican ☐ Multi-racial
☐ Other (Please specify.) ____

What is the highest level of education you have completed? Please mark only one.

☐ High school degree or lower
☐ Some college or Associate degree
☐ Bachelor's degree
☐ Master's/ Doctorate degree

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UofSC Hospitality, Retail and Sport Management