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Tourism rebound in the post-pandemic era: An analysis of consumer behavior

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ABSTRACT: The primary objective of this study focused on analyzing the behavior of tourist product consumers in the post-pandemic period. To achieve this, a research was conducted, encompassing websites and scientific articles from the years 2020 to 2022, with the aim of identifying the major challenges and assessing how tourists perceived the post-pandemic recovery. The study relied on data from official websites of the Ministry of Tourism (Mtur), the Forum of Hotel Operators in Brazil (FOHB), and a recent survey conducted by the website O Globo. The central findings related to consumer behavior indicated that while the tourism sector has not yet fully recovered, its resurgence has shown a positive trajectory. Notably, the airline and hotel sectors have been prominent in this recovery. Furthermore, it was observed that tourists are currently inclined to choose domestic flights during this period of recovery, often with an emphasis on family travel.

Keywords: Pandemic;
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Introduction

Tourism, as an economic sector, exhibits a unique susceptibility to situational changes, rendering it sensitive to fluctuations, including exchange rates, seasonal shifts in demand, meteorological and geological risks, social unrest, political instability, terrorism, and public health threats such as epidemics and pandemics, as exemplified by the recent outbreak of Covid-19 (BENI, 2020).

The year 2020 was anticipated to be ideal for tourism expansion due to the abundance of extended holidays, with a projected twofold increase in the number of trips (GROLLA, 2020).

Despite rigorous isolation measures, the utilization of masks and hand sanitizers, Brazil ranked second in the number of infections, grappling with new variants and encountering significant hurdles in combatting the pandemic (FRANCÊS, 2020; VIOLIN, 2022).

Trigo (2020) states that the expansion of Covid-19 progressively disrupted healthcare systems, international air, maritime, and land travel, general commerce, as well as interconnected sectors, including events and public entertainment.

Subsequently, following the extensive employment of social isolation measures in numerous parts of the world, movements are now resuming to facilitate the reopening and recovery of activities. Consequently, the tourism sector is identified as one of the economic sectors that has suffered the most in terms of recovery, impacting both the financial environment and employment prospects (ARES, 2020, p. 04).

As Magalhães (2022) underscores, "The revival of tourism is exceedingly vital for the economy, as many countries heavily rely on tourism, with establishments such as hotels, restaurants, transport services, and tourist attractions catering to international travelers" p.12.

Nevertheless, according to the research conducted by Soares (2020), the new tourism landscape is anticipated to prioritize safe travels, while aspects related to tourist behavior at destinations are expected to closely resemble their pre-pandemic patterns (VIOLIN, 2021). It is important to note that there will likely be an upsurge in the demand for international travel health insurance.

Thus, the primary objective of this study is to elucidate the perceptions of tourism consumers concerning post-pandemic recovery and the resumption of in-person activities, utilizing news articles and reports on the subject.

Theoretical Framework

From pre-pandemic to post-pandemic in tourism

In mid-2019, to be precise, towards the end of that year, an unfamiliar pneumonia outbreak emerged in the province of Wuhan, China, and was initially reported by the World Health Organization (WHO) on December 31, 2019. Initially characterized as an unidentified ailment, it was initially labeled as 2019-nCoV, stemming from the novel coronavirus (SARS-CoV-2), and subsequently became internationally recognized as COVID-19.

A month after these occurrences (January 30, 2020), the World Health Organization (WHO) declared the outbreak of the disease as a Public Health Emergency of International Concern, the highest level of alert within the organization. On March 11, 2020, COVID-19 was officially designated as a pandemic (FRANCÊS et al., 2020).

Consequently, as per Ficagna (2020), the repercussions of the pandemic resulted in unprecedented historical effects and influenced the dynamics of interpersonal relationships. Among the primary consequences, sociodemographic factors assumed significance, with the necessity for physical distancing and isolation leading to a form of "confinement," giving rise to various psychological and emotional disorders that adversely impacted the mental well-being of numerous individuals.

The year 2020 commenced with high expectations for the tourism sector, with anticipations of increased travel and, consequently, enhanced revenues for companies across various segments. Nevertheless, in the first quarter, the industry encountered a period of stagnation due to the circulation of the novel Coronavirus. This led to the disruption of international travel, recommendations for social isolation to mitigate the virus's spread, and business closures, causing certain sectors to face operational challenges (ARES, 2020, p. 04).

As a result, certain segments of the tourism industry experienced a substantial economic decline, making it exceptionally challenging to conduct their operations during this period. Therefore: “The economic activities most affected by Covid-19 are hotels and lodges, bars and restaurants, transportation (air and road), travel agencies, vacation rentals, event venues and entertainment, as well as companies engaged in recreational, cultural, and sports activities (MAGALHÃES, 2022, p. 10).”

The majority of the essential elements that facilitate international travel and enable the global expansion of tourism have come to a standstill. The closure of hotels, restaurants, entertainment venues, and various tourist attractions has led to a complete halt in the tourism sector. As a result of the international travel suspension and the impact on domestic travel, tourism flows have effectively ground to a halt (NIEWIADOMSKI, 2020).

Following the implementation of social isolation measures in most regions of the world, recent move-

ments have begun to reopen and resume business activities. Tourism stands out as one of the economic sectors facing substantial challenges in its operational recovery, influencing financial projections and employment outlooks (ARES, 2020, p. 04).
Hence, it is discernible that tourism was among the sectors most profoundly affected by the crisis triggered by the COVID-19 pandemic due to its wide-ranging repercussions. Consequently, the year 2021 will be remembered as the year that brought tourism back into the "light." Many individuals started to break free from the significant restrictions imposed by the pandemic and gradually resumed their leisure activities, including traveling to different destinations. It is crucial to note that this became feasible with the introduction of vaccination in the country (CASTRO, 2021).

The tourism rebound

The disruption of the tourism supply chain has had ramifications for job creation across various sectors, not only within the travel industry but also among those reliant on it for their market presence. Consequently, this has significantly impacted company revenues and, by extension, employment, which is detrimental to the economic cycle (ARES, 2020; HONORATO & VIOLIN, 2020).
Beni (2020) emphasizes that the recovery process will be gradual, with the initial phase driven by business tourism due to the continued need for work-related travel. Hence, the aviation and hotel sectors are poised to be the first to recommence their operations, albeit with controlled tourist volumes. Subsequently, sectors such as automotive, food, and beverage will follow suit.
As indicated by Trigo (2020), another substantial sector profoundly affected by the pandemic was the cruise industry, with their operations suspended for several months, leading to substantial job losses. Similar impacts were observed in the airline, road transport, and railway sectors, as well as within shopping centers, entertainment venues, event facilities, theme parks, hotels, and resorts. While not all operations were entirely halted, there was a significant decline in sales, ranging from 40 to 90 percent.
After two years of the pandemic and the suspension of tourism activities, the sector is making a recovery aided by vaccination. "After an extended period of closed borders and social distancing enforced due to the coronavirus, tourism is now on a growth trajectory" (Lisboa, 2022, p.3).
With the progress of COVID-19 vaccination, the tourism activity index in Brazil, measured by IBGE, displayed a 21% increase in 2021. A study conducted by the Federation of Commerce of Goods, Services, and Tourism of the State of São Paulo (FECOMERCIOSP) also reveals that the sector generated revenues of R$ 152.4 billion last year, representing a 12% increase compared to 2020 (FECOMERCIOSP, 2022a).
The advancement in vaccination has fostered a more optimistic outlook for pandemic management, and people are eager to put into practice one of the priorities established during the period of isolation: traveling more (PRADO & MARIANO, 2021).
After two years of the COVID-19 pandemic, which led to travel restrictions across different parts of the world and temporary closures in various sectors of the economy, Brazil has resumed welcoming significant numbers of flights from other countries (AGÊNCIA BRASIL, 2022).
As time progresses and activities return to their normal pace, notable improvements are already discernible in certain segments of the tourism sector, as evidenced by data from a research study conducted by the Tourism Council of FecomercioSP: "The resurgence in demand for family travel and inflation in the sector were factors that drove a 30.6% growth in the eighth month of the year. In the 12-month period, the increase is positive at 32.9%, as both families and businesses have resumed travel planning and stimulated the entire chain, thereby boosting leisure and corporate segments. Among the segments, particular emphasis is given to air transportation, which experienced an annual growth rate of 72.8%. Compared to the same period in 2019, before the pandemic, the increase is 19.9%" (FecomercioSP, 2022b, p.6)."
In July of the 2021, domestic tourism generated revenues amounting to R$18.3 billion, marking a notable growth of 32.1% when compared to the previous year. This substantial upsurge was predominantly attributed to the occurrence of school vacations in the seventh month, which, in turn, led to increased numbers across various segments. Notably, these segments include "air transportation, exhibiting a remarkable 86.8% growth in the yearly comparison. Subsequently, there was noticeable growth in accommodation and food services (22%); cultural, recreational, and sports activities (18.8%); water transportation (12.6%); and land transportation (14.2%); in addition to a group of sectors encompassing vehicle rental, travel agencies, and tour operators, which registered a growth of 2.4%" (FecomercioSP, 2022c, p.5).

Tourist behavior in the post-pandemic era

The pandemic has heightened tourists' awareness of health and safety, leading to increased demands from them. Ficagna (2020, p. 4) asserts, "The new reality we are attempting to adapt to must instill a sense of security in tourists, allowing them to fully savor the tourism experience in the post-pandemic context."
According to Freya Higgins Desbiolles, the emergence of the Covid-19 pandemic presents an opportunity to shape desirable tourist behaviors, as the industry had already been pursuing a new consumer profile

(BROUDER, 2020).
A study titled "Tourism in the Post-Pandemic Era: Accelerating Recovery," conducted by O Globo (2021), reveals that tourists are driven to travel after the pandemic to break away from routine and seek well-being and enjoyment. Additionally, it is noted that travel serves as a means for people to temporarily escape their problems and enhance their lives. However, it is essential to note that while research data indicates that 43% of tourists were already saving money in 2021, six months prior to the resumption of travel, there are those who prioritize financial security. Consequently, tourists are also allocating their funds to a safety net, accounting for 60% of consumers.
The Covid-19 pandemic has induced significant changes in people's daily routines, completely disrupting their normal practices. Owing to the necessary lockdowns, their travel plans were put on hold for an indefinite period. Nevertheless, with travel recovery, it is anticipated that a substantial portion of consumers' expenditures will be directed towards trips, as indicated by the Traveler Value Index research: "The travel budget for over a third (34%) of travelers is now higher than in 2020. Nearly one in five people (18%) expects their biggest expenses in 2021 to be related to travel, equaling the expenses for home renovation (18%) and surpassing expenditures on entertainment (12%), purchasing or maintaining a car (11%), or healthcare (11%). They are also willing to cut other expenses and allocate that money towards travel (Expedia Group, 2021, p. 13)."
The global disruption of travel caused by the pandemic has underscored the importance of human connections and highlighted the positive influence of travel on individuals' lives. Travel serves to broaden worldviews, foster deeper intercultural comprehension, and enrich one's knowledge of the destinations they visit.
According to Expedia Group (2021), approximately 56% of travelers have affirmed that the foremost benefit of traveling lies in the acquisition of new experiences. Additionally, 48% of travelers have identified physical and mental well-being as the principal advantage of traveling, 51% actively seek to gain insights into other cultures and communities during their journeys, and 33% of travelers embark on their voyages with the aspiration of becoming more diverse individuals (Expedia Group, 2021).

Methodology

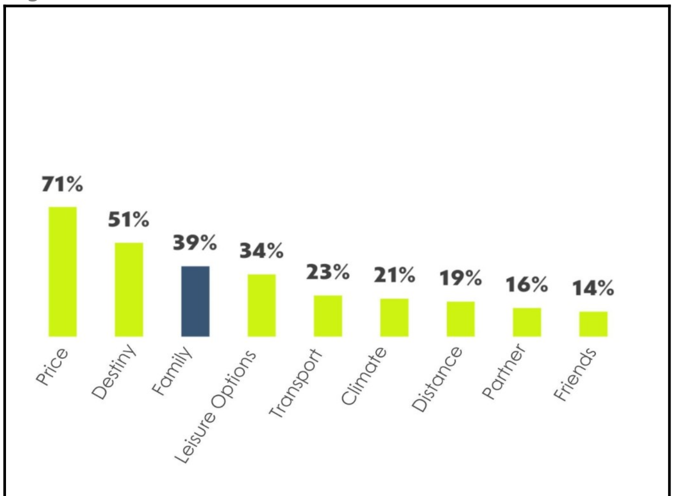
The methodology is based on a qualitative study, which stems from a set of analysis indicators. Cardano (2017) defines as qualitative research studies that exhibit: "A persuasive argument capable of convincing the scientific community of the reasons and interest in the question to be investigated (its theoretical significance, its pragmatic relevance), as well as the methodological procedures adopted and activated to construct the response to the research question (Cardano, 2017, p. 12)."
The descriptive nature of the research becomes evident when considering the different elements collected during the data collection phase, which are presented through a systematic analysis of indicators that allow understanding of the factors related to tourist behavior in the post-pandemic period during the resumption of activities. Thus, the research can be considered descriptive, based on the definition provided by Marconi et al. (2017, p.15), who states that it "outlines what it is" and encompasses four aspects: description, recording, analysis, and interpretation of current phenomena, observing their functioning in the present.
The study adopts an inductive nature, as explained by Suertegaray (2005): "It constitutes the Positive method, a historical, genetic, inductive method, that is, it starts from observation, induces laws of coexistence and succession, and deduces new facts that escape direct observation. It is a method that privileges the process of induction, which starts from the observation of phenomena through the senses to deduce theories. Fundamental and expressive words for understanding the Positive method are experience, observation, comparison, analogy, induction, deduction, historical affiliation (Suertegaray, 2005, p. 15)."
Other data were extracted from documentary sources, which can be referred to as sources "that encompass studies, diagnoses, and evaluations related to individuals and institutions," as described by Gehrke (2018, p. 9). These sources were collected through articles, news, and protocols, which are referenced in this material.

Results and Discussion

After two years of the pandemic and amidst rigorous restriction and isolation measures, the tourism sector is gradually initiating the process of recovery, with emerging positive indicators in specific segments, even though the COVID-19 pandemic is yet to be entirely eradicated.
Data provided by the Ministry of Tourism (Mtur) indicates an increase in airport activity within the country, signifying a heightened stimulation of the domestic air network. Consequently, it has been observed that Brazil has acquired several new flight routes, reactivating connections to destinations where commercial activities were previously halted (BRASIL, 2022).
Among the airlines, Gol has notably introduced more than 30 new domestic flights, including ten routes to destinations the company had not previously served. In 2022, Latam also displayed activity by inaugurating flights to various airports and reopening ten additional

routes. Furthermore, Azul, another prominent airline, has launched new routes, particularly those originating from Goiás, featuring 26 additional routes (BRASIL, 2022).
Data from the National Civil Aviation Agency (Anac) reveals that, in July of this year, over 7.6 million passengers traveled domestically, marking the most robust month for the sector. When compared to 2019, this figure represents 89% of the volume of passengers transported (BRASIL, 2022).
Another segment within the tourism industry demonstrating progress in its recovery is the hotel sector. According to data from the Forum of Hotel Operators in Brazil (FOHB), there has been a consistent rise in occupancy rates, reaching 67.7% from January to September of the current year. Particularly, the Southern and Southeast regions have exhibited more substantial increases in comparison to the national average, reaching 70.6% and 77.4%, respectively, surpassing the previous year's figures (FOHB, 2022).
The study further scrutinized occupancy rates in various cities throughout the country from January to September. Among the main visited cities, a 27.5% increase in Vitória and a remarkable 169.8% increase in Campinas were recorded. Other locations also displayed commendable occupancy rates (FOHB, 2022).
The research also delved into the segment in the month of September, revealing a 26.1% upturn in occupancy rates nationwide, exceeding 62% of bed occupancy. The Northern and Northeastern regions particularly stood out, with rates reaching 67.3% and 64.1%, respectively (FOHB, 2022).
In a study conducted by O Globo (2022), leisure emerged as the primary motive for travel for 83% of individuals. Furthermore, the majority of responses indicated that traveling with family was the third most common motivation. Other factors influencing travel decisions encompassed price, destination, climate, among others, as illustrated in the figure below.

Figure 1: Travel Motivation



Source: Prado; Mariano, 2022.

Therefore, the post-pandemic scenario for the tourism sector presents a good rate of recovery. It is possible to observe a motivation for domestic travel, which becomes a positive indication for tourism activities in Brazil.

Final Considerations

In light of the array of findings, it can be affirmed that, after two years of the pandemic, the recovery of the tourism sector, and by extension, all its constituent facets, initially signaled a constrained resurgence. Nevertheless, over a brief span, these metrics have consistently shown an upward trend, effectively countering the period of stagnation experienced during the constraints imposed by the Covid-19 pandemic.
Evidently, the aviation sector has stood out prominently in this recovery process, particularly with the introduction of new flight routes by various companies. The substantial increase in passenger numbers during the second half of 2022 signifies a gradual and consistent upturn in both domestic and international travel. Consequently, the tourism industry, inclusive of the hotel sector, reaps the benefits of the resumption of air activities, thereby contributing to the increase in hotel occupancy rates.
Furthermore, concerning the motivations for travel, tourists have notably favored family moments. Hence, destinations should concentrate on promoting offers that cater to this demographic. It is discernible that tourists approach this post-pandemic period with elevated expectations and heightened concerns about the destinations they intend to visit. Thus, it is of paramount importance for destinations to convey a sense of security to their visitors.
Moreover, tourists are actively seeking offers and attractions that provide them with novel experiences. They are also paying closer attention to the quality of services provided to them. Consequently, companies and destinations that prioritize hospitality as a foundational element gain prominence due to the anticipated warm reception during this new phase. In this context, companies should concentrate on initiatives that foster a connection between their offerings and customer demand while consistently striving for innovation.
The study represents a significant advancement in theoretical understanding by presenting a well-organized compilation of noteworthy insights into consumer behavior pertaining to the post-pandemic recovery of the tourism sector and the consumption of its services.
Based on the findings throughout the study, it is recommended to extend the research with a more comprehensive study that delves deeper into the broader impacts of the pandemic on both the tourism sector and the evolving perceptions of tourists within this recovery phase.

This study makes a substantial contribution to understanding the repercussions of the Covid-19 pandemic on the tourism sector by collating data from official sources that systematically categorize the development and operational structures underlying the resumption of tourism activities.

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