COVID-19 AND CENTRAL EUROPEAN TOURISM: THE COMPETITIVENESS OF SLOVAK TOURIST GUIDES

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Abstract

When the COVID-19 pandemic arrived in the Central European region in March 2020, one of the hardest-hit economic sectors was the tourism industry which virtually came to a complete standstill. The present paper uses licensed tourist guides from Slovakia as a case study of how significant the financial impact of the crisis was and what effect it might have on the future competitiveness of the industry, as perceived by the tourist guides themselves. The research is based on a questionnaire which was distributed among licensed tourist guides in Slovakia in July 2020. It is shown that the guiding income of more than four-fifths of the respondents decreased by at least 80% between March and June 2020, and the profession's outlook for the future is pessimistic. The main concerns are a decline in the number of visitors, a decline in demand for guided tours and lower market prices for guiding services. The lower share of group travel, faster development of proximity tourism, partial de-professionalisation of the tourist guide profession and higher emphasis on tour hygiene are the expected impacts of the pandemic. A wave of consolidation is almost guaranteed to influence the tourism industry, though its extent is hard to predict.

Implications for Central European audience: The article deals with tourism, which represents an important part of Central European countries' economies. Its results constitute the first preview of impacts of the COVID-19 pandemic on the sector in the region and as such are valuable for stakeholders in the Central European tourism industry. Even though the research is based on data obtained only from one tourism-related profession, tourist guides, given their unique position between travel agencies and travellers, their insights are applicable and interpretable much more broadly.

Keywords: tourism; tourist guide; competitiveness; COVID-19

JEL Classification: L83, Z31

Introduction

Tourism has been one of the drivers of the world economy in the last decade. Foreign visitor exports (i.e. money spent by foreign tourists abroad) have grown by 50 % since 2009, and the total contribution of travel and tourism to the global GDP is currently estimated at 10.3 % and 330 million jobs (WTTC, 2020). Being based on open borders, functioning transportation networks and high international mobility, it is no surprise that the sector has been hit enormously by the COVID-19 pandemic. When the cases of coronavirus began to grow in Europe in March 2020, countries responded by swiftly closing borders and shutting down international transportation; tourism came to a complete standstill.

Central European countries were no exception. Slovakia, Czechia, Poland and Hungary all closed their borders and only allowed entry to own residents. Austria and the Baltic countries, among others, took similar measures. The thriving local tourist market disappeared with little advance warning. Compared to the previous year, the number of bed nights in April 2020 was 99.1 % lower in Vienna (WienTourismus, 2020b), 98.5 % lower in Budapest (KSH, 2020) and even though statistics for other local capitals are not yet available as of the time of writing, little suggests that they would be significantly different. This had a profound negative impact on travel agencies, hotels, restaurants and other highly seasonal businesses, but also on professions such as drivers, street artists or tourist guides. It is the latter category that this research focuses on.

The aim of the present paper is to assess the impact of COVID-19 on tourism in Central Europe, using Slovakian licenced tourist guides as a case study. There are two main areas of interest: a) actual financial impact and b) effect on future competitiveness as perceived by the profession itself. The aims can be divided into two research questions:

RS1: What was the financial impact of COVID-19 on Slovak tourist guides?

RS2: What qualities do tourist guides perceive to be the key components of their competitiveness, and how do they expect the competitiveness to change as a result of COVID-19?

Considering that tourist guides are an integral part of organised tourism and are mostly contracted by large tour companies, their assessment of future (based on their level of bookings) is a good indication of how the whole industry fares. A questionnaire was distributed among Slovak tourist guides, and additional in-depth interviews were conducted with ten local tourist guides.

For the purposes of this paper, we adopt the World Federation of Tourist Guide Associations's definition of a tourist guide as "a person who guides visitors in the language of their choice and interprets the cultural and natural heritage of an area" (WFTGA, 2003) as opposed to tour managers or other similar professions.

Slovakia was chosen for multiple reasons. First, it was the first country in Europe to close its borders (March 12, 2020), thus creating a precedence that other countries soon followed. The rule was strictly enforced, and international tourism was virtually forbidden until the beginning of June. Second, due to the small size of the domestic market, its capital Bratislava relies almost completely on foreign tourists. Third, it is usually not the starting point or ending point of multiple-country cruises or bus tours (this is often Vienna, Budapest or Prague), making it more susceptible to market disruptions. Finally, a substantial share of the country's tourist guides is organised in one of two active tourist guide associations which makes them easily contactable for personal interviews and ensures high response rate of questionnaires.

1 Literature Review

Even though the topic is extremely recent, several studies have already been published on the potential impact of COVID-19 on tourism. In an early paper published when the full extent of the pandemic was not yet known, Gössling et al. (2020) argue that COVID-19 is an analogue to the climate crisis and as such is yet another opportunity to divert tourism from the growth-demanding trajectory onto the path of sustainability. Several other authors have taken this optimistic view and consider the pandemic as a factor that could possibly lead to a positive change. Romagosa (2020) expects the stakeholders "to help redirect tourism […] towards a truly sustainable and resilient profile"; Nepal (2020) believes "the COVID-19 has given the global adventure tourism industry an opportunity to reset"; Ioannides and Gyimothy (2020) see it as an "unprecedented situation, allowing us to grasp the opportunity and to rectify an otherwise defective global system"; and Prideaux et al. (2020) see the pandemic as a lesson for future dealing with the climate change.

Other direction of research focuses more on assessing impacts of COVID-19. Given the great extent of uncertainty, this is done almost entirely on a qualitative basis with no hard data to build models on. Even the few quantitative projections which exist – and have been elaborated by industry groups or international organisations such as World Tourism Organisation (2020), International Civil Aviation Organization (2020) or International Air Transport Association (2020) – are very imprecise and include multiple diverging scenarios. Sukharev (2020) uses structural analysis to estimate expected damage and expected benefit to individual industries. While he identifies some economic sectors benefiting from the pandemic (e.g. pharmaceuticals), tourism is given as an example of the worst-hit sectors. Assaf and Scuderi (2020) predict lower supply and higher prices industry-wide and offer a list of mostly epidemiologic strategies to bring customers' confidence in travelling back to normal. These include higher use of robots and automation technologies. Other authors highlight the increasing importance of e-tourism (Gretzel et al., 2020). Gössling et al. (2020) review early projections of impact on airlines, accommodation providers, restaurants and cruise ship companies. None of the studies published so far makes any mention about tourist guides.

Before the "corona era" the topic of competitiveness of tourist guides had a relatively prominent presence in top journals in the field. Numerous factors have been studied, which were proved to increase the tourist guides' competitiveness, the effectiveness of interpretation or customers' satisfaction. Probably the most well-known study (Zhang and Chow, 2004) provides an extensive review of available literature and defines tourist guides as multi-taskers simultaneously performing the roles of actors, ambassadors, buffers, caretakers, catalysts, culture brokers, information-givers, intermediaries, interpreters, leaders, mediators, middlemen, organisers, salespersons, shamans and teachers. Based on the survey among Chinese visitors of Hong Kong, it ranks tourist guide service quality attributes and finds that punctuality, problem-solving ability, knowledge and honesty are the most important ones. Huang et al. (2009) look at the satisfaction of Chinese and foreign tourists with tourist guides in Shanghai and identify 35 different performance attributes which could be grouped under the terms professional competence, interpersonal skills and organisation, empathy, and problem-solving. Sezgin & Duz (2017) also developed a tourist guide performance matrix composed of 18 attributes within three dimensions – personality, "presentableness" and proficiency.

Many papers do not study the factors on a holistic level but instead focus on individual qualities of tourist guides which increase their competitiveness, such as communication competency (Leclerc and Martin, 2004; Al Jahwari et al., 2016), intercultural competence (Huang and Wang, 2007), emotional intelligence (Min, 2010), or even the design and content of the guide's online profile (Banerjee and Chua, 2020).

Some authors direct their attention to specific types of tours and analyse visitors' perception of guiding services in the Himalayas (Poudel et al., 2013) or in natural areas in general (Randall and Rollins, 2009). Unsurprisingly, the results indicate that in these cases, communication is not an important factor of a guide's success, and other qualities – such as the instrumental role – dominate.

Tsai et al. (2016) found that even very superficial factors, such as physical attractiveness and attire, play an important role, but conclude that humour can compensate for the lack of the former. Humour, in general, can be seen as a very important factor of competitiveness. Pabel and Pearce (2016) have shown that it contributes significantly to the tourists' comfort and concentration. After attending a tour with carefully manipulated levels of humour, almost 96% of their respondents indicated that they would potentially visit another place or attraction with a similar style of commentary. Humour thus represents a crucial opportunity for tourist guides to differentiate themselves from the competition.

Mak et al. (2011) look at the topic from a negative perspective. Their aim is not to analyse the factors of success, but rather to identify problems. Using Hong Kong and Macau as the regions of interest, they present the following six issues affecting tourist guides' professionalism and competitiveness: unhealthy business practices of outbound travel agencies, immaturity of the Chinese tourism market, exploitative measures by inbound tour operators, human resource issues, role conflict, and service quality assurance mechanism. Ap and Wong (2001) provide a similar list and conclude that they are unlikely to be unique for Hong Kong, but are common "in most other countries".

Not many papers have looked at the competitiveness from the perspective of tourist guides themselves. Probably the most prominent exception is Liao et al. (2011) who studied methods of assessing tourist guides in Taiwan. Using a combination of previous literature review, consultations with experts and survey among tourist guides, they identified 12 most important performance factors, which we believe can also be understood as factors of competitiveness: communication, interpretation, ability to handle emergencies, politeness, friendliness, neatness, atmosphere, helpfulness, finance, cautiousness, conscientiousness and honesty. There are also a few other papers out there which deal with tourist guides' perceptions, but they treat completely unrelated topics, such as how tourist guides perceive low-cost tours (Wang, 2020), travel health promotion (Wirawan et al., 2020) or what their attitude towards HIV is (Avcikurt et al., 2011).

In conclusion, dozens of papers have been published on the competitiveness of tourist guides, but rarely do they take into account the perception of the actual practitioners of the profession. The topic is not only under-researched on the global level, but completely "virgin" in the Central European context. Moreover, the COVID-19 pandemic has a strong potential to leave permanent marks on the tourism industry and reshape its competitiveness patterns; knowing the guides' perspective and current mood will therefore be an important indicator of the expected future development. These all are the main lines along which the current paper finds its place in literature.

2 Research Methodology and Data

The present research is based on a questionnaire which was distributed among licensed tourist guides in Slovakia and administered between July 5, 2020, and July 13, 2020.

Following the best practice, a preliminary version of the questionnaire was consulted with a sociologist and then sent to seven responders to verify all the questions are understandable and unambiguous with clear wording. After that, the final version was prepared, uploaded online, and link to the questionnaire was shared with tourist guides by means of Facebook and e-mail. It must be noted that because the vast majority of the Slovak tourist guides are freelancers, to our best knowledge all of them are active users of e-mail no matter to which age category they belong, as they use it for work. However, information about the survey was also distributed by text messages to ensure the highest possible reach. Link to the questionnaire was not published online on any website or public group to avoid unwanted submissions by the general public.

Due to the fact that there is no official evidence or compulsory membership in a guild, it is not possible to know exactly how many tourist guides are there in Slovakia, let alone how many of them are active. As an additional complication, the difference between a tourist guide and a tour manager is not satisfactorily addressed in national laws and the terms are often used interchangeably even by the members of the professions themselves. Based on independent assessments of three experts (Bratislava Tourist Board board of directors member, tourist guide association vice-president, experienced tourist guide), it can be estimated that the number of active guides is between 90 and 150, the former being much more realistic than the latter. Even though the two tourist guide associations which exist in Slovakia and can be joined on a voluntary basis have around 200 members in total, a large portion of them are not active or are not active domestically. Ninety guides are members of a specialised private group on Facebook, where we shared the questionnaire.

The questionnaire included 28 questions of various types, both open and closed, as well as semi-closed. The first question was a verification question to ensure the respondent is a licenced tourist guide. In case of a negative answer, the questionnaire would automatically be closed; thanks to the highly targeted distribution, as described above, this did not happen.

The rest of the questionnaire was divided into three sections – basic socio-demographic questions, COVID-19-related questions and competitiveness-related questions. We adhered to all the usual principles of correct sociologic surveys, i.e. each multiple-choice question had an "I do not know / I prefer not to answer" option, appropriate questions allowed a different answer to be filled in manually etc. For the opinion-based question, 5-point Likert scale was used. When asked about tourist guide knowledge and qualities shaping the competitiveness, the attributes to be evaluated were adopted from previous research (Zhang & Chow, 2004; Liao et al., 2011) and consulted with experienced tourist guides to make changes appropriate for the local setting.

We tested both face and content validity of the questionnaire. We reached out to five respondents several days after they filled in the survey to ask them about their subjective opinion of the questions and to determine whether there is a match between how the author and the respondents perceive the survey's intentions. We verified that the perception of what the questionnaire measures are the same on both sides. Similarly, content validity was ensured by adopting attributes from previous research, using semi-closed questions and obtaining expert assessment on the preliminary version.

The reliability of the questionnaire was tested by the usual parallel-form-type method of placing two interconnected questions in separate parts of the document. The internal consistency of the questionnaire was then verified by comparing the answers to these two questions, with the results that the questionnaire appears to be reliable. The first question in the COVID-19 section was "Do you have any other income except for guiding?" with possible answers offered in the multiple-choice form: "Yes, guiding is only my side income", "Yes, but guiding is my main income", "No, guiding is my only income" and "I prefer not to answer". Twenty-two questions later, a related question was placed: "In a standard year, what is the share of guiding on your total income?" The answers were divided into five 20-per-cent bands. The match between how respondents answered both questions was almost perfect with a single exception when guiding was attributed the share of 61-80 % on total income, but simultaneously was stated to be the only income. This was probably an unintended error when typing (misselecting an answer adjacent to the desired one), as the other answers of the respondent were all reasonable and did not show any signs of automatic thoughtless filling.

3 Results and Discussion

3.1 Profile of respondents

There is no agreed-upon standard minimal response rate of questionnaire-based surveys (Draugalis et al., 2008). While some researchers consider 51% to be marginally adequate (Pinsonneault and Kraemer, 1993), others require 65% to satisfactorily deal with the non-response bias (Dolsen & Machlis, 1991) and some journals even 80% (Fincham, 2008). These response rates are usually based on survey sampling. In our case, we target the entire population of tourist guides in Slovakia. As explained before, tourist guides were approached mostly by a post in their Facebook group and e-mails, with follow-up reminders. We are aware of several cases of snowballing when respondents forwarded the questionnaire to other tourist guides. This is completely acceptable and allowed us to increase the reach within the target group, the final count of which is not known.

During the 9-day survey period, 60 completely filled in questionnaires were submitted. Depending on the estimate of the number of active tourist guides, this represents response rate in the range between 40% and 67% from the whole target population, including even those few tourist guides who might not have gotten to know about the survey. Taking 100 guides as a reasonable approximation, the response rate would be 60%, which might be considered satisfactory.

As can be seen from the socio-demographic profile of the respondents (Tables 1 and 2), they included guides of all ages, job statuses and qualifications. Indeed, this is the nature of the tour guiding business – it is very varied.

Table 1 | Socio-demographic profile of respondents: age and guiding experience

Experience \ age group	21-30	31-40	41-50	51-60	61 +	Total
0-10 years	3	11	9	2	3	28 (47%)
11-20 years	0	6	7	6	3	22 (37%)
21-30 years	0	0	0	3	2	5 (8%)
More than 30 years	0	0	0	1	4	5 (8%)
Total	3 (5%)	17 (28%)	16 (27%)	12 (20%)	12 (20%)	60 (100%)

Source: own calculation

The largest share of the respondents was in the up-to-10-year-experience range and of young or medium age. The lowest indicated number of years of experience was 2, the highest reached 43 years, with an average of 14.1 and a median of 11.5. The absence of anyone with just a single year of experience is not surprising, given the fact that new guides were unable to start giving tours in 2020 due to COVID-19. Hence each active guide has an experience at least since 2019.

For almost two-thirds of the respondents, guiding represents the main (or the only) source of income. This appears to be increasing with age, and while for guides under 40 years of age the share is 55%, it is 73% for the guides in their 40s and 91% for the guides in their 50s, before dropping again to 70% for older respondents, presumably as a result of the government-provided pension income. On average guiding provides 65% of a guide's total income, with no significant differences between groups with various length of guiding experience.

Table 2 | Socio-demographic profile of respondents: guiding languages and job status

Job status \ number of guiding languages	0	1	2	3	4 +	Total
Guiding as the only income	1	9	4	3	2	19 (32%)
More sources, guiding as the main income	1	4	9	5	1	20 (33%)
More sources, other as the main income	1	3	7	3	3	17 (28%)
Preferred not to answer	0	2	2	0	0	4 (7%)
Total	3 (5%)	18 (30%)	22 (37%)	11 (18%)	6 (10%)	60 (100%)

Source: own calculation

An average Slovak guide provides his/her services in two foreign languages (not considering Czech as a foreign language). The number of languages gradually increases with the number of years of experience, from an initial average of 1.8 for respondents with up to 10 years of experience to 2.8 for respondents with over 30 years of experience. This can be seen as a result of lifetime learning and increasing one's own qualification. However, as can be seen in Table 1, there is no perfect correlation between age and experience, and interestingly guides in their 40s tend to guide in fewer languages than the other ones. The paradox probably has historical reasons as this is the generation which (with a certain level of generalisation) did not have time to master Russian before the end of the socialist regime and was already out of school or in higher school grades when the boom of studying foreign languages arrived in the 1990s.

Another surprising discovery from the socio-demographic profile of respondents is that "full-time guides", i.e. those who do not have any other source of income, tend to perform their job in fewer foreign languages than those who have alternative sources of income. This could have various explanations (generational differences, higher labour market flexibility of multilingual people etc.) and is beyond the scope of the present paper.

3.2 Financial impact of COVID-19 on Slovak tourist guides

More than 80% of Slovak tourist guides estimated that between March and June 2020, their guiding income fell by more than 80% compared to the same period in 2019 (Table 3). In personal interviews, several of them indicated that the number of tourists that used their services in the first half-year 2020 was zero.

Table 3 | Actual and expected decrease of tourist guides' guiding income (in per cent)

	0-20	21-40	41-60	61-80	81+	Increase	n/a
Actual decrease in income (March-June 2020)	5%	2%	2%	7%	81%	0%	3%
Expected decrease in income (August-October 2020)	2%	2%	5%	5%	68%	0%	18%

Source: own calculation

The situation was caused by the very unfortunate timing of the first wave of the COVID-19 epidemic – it reached Central Europe in the first half of March, which is when the number of tourist arrivals normally begins to grow until the season reaches its full swing starting in May. As guiding is a seasonal job, full-time tourist guides are aware that they have to generate enough revenues in Summer to be able to outlast "slow" winter. In 2020, however, just when the winter was coming to an end and revenues were again expected to surpass costs, the governments closed the borders. This meant that many tourist guides were left with reserves close to zero and no source of income. Based on the current level of reservations, the situation looks similar until the end of the season and only a handful of guides foresee any substantial guiding income.

The outlook for the next year is also bleak. Only 10% of the respondents indicated that they assume their guiding income in 2021 will reach at least the level of 2019. The opposite scenario is expected by 57%, meaning the mood of the profession is decisively pessimistic. Indeed, 5% of the respondents do not see themselves guiding in 2021 anymore, both due to early retirement and the need to find a more stable source of income.

Similar to the majority of European countries, the Slovak government recognised the urgency of the crisis and introduced several measures designed to mitigate its impact. These included postponement of social insurance payments and direct financial help to entrepreneurs with a significant decline in revenue. None of them was intended specifically for the tourism industry, but the majority of the guides (65%) took advantage of them. However, the upper limit of direct financial help was set at 540 euros per month, which is considered unsatisfactory by many (58%) and did not relieve the profession's worries. On a scale from 0 to 10, the extent of the guides' concerns that by the end of 2020 they will not be able to cover their usual costs of living (mortgage/rent, car, insurance etc.) is 6.5. 33% of the guides indicated the highest level of worry. Quite paradoxically, only just over one-fifth of the respondents adopted some measures to cope with their lower-income from tourism. This included mostly finding a temporary job or temporarily suspending their guiding trade licence (which is an easy procedure allowed by the Slovak law), but two guides cancelled their guiding trade licence altogether (Table 4).

Table 4 | Measures taken and/or considered to mitigate the impact of the financial crisis

	Taken	Considered	None	n/a
Cancellation of the guiding trade licence	3%	37%	60%	0%
Temporary suspension of the licence	7%	53%	40%	0%
Permanent change of business field	5%	42%	50%	3%
Temporary job	12%	38%	48%	2%
Moving abroad	0%	30%	63%	7%

Source: Original research

The situation is definitely not unique to tourist guides in Slovakia and might be similar in other Central European countries and the world in general. While our survey focused chiefly on Slovakia, other Visegrad countries have faced comparable problems. With the closure of borders, the income of tourist guides fell to zero or near zero, as people stopped travelling. For example, in a survey conducted among Polish guides at the beginning of the crisis, 66% declared that if the crisis lasts for more than four months and the governmental help will not be increased, they will close their trade and rather become officially unemployed (FSP, 2020). While Poland and Czechia both introduced direct payments to affected entrepreneurs (approx. 560 euros per month in Czechia and 450 euros in Poland), this was not the case in Hungary, leading to a high level of dissatisfaction among guides. This culminated in a "flash-mob" protest organised in downtown Budapest by Hungarian guides to draw attention to their financial situation. All of this suggests that the crisis has had a profound impact on tourist guides all over the Central European region; however, as of now, no reliable data exist that would allow us to objectively compare the situation of Slovak tourist guides with their peers in the neighbouring countries.

3.3 Competitiveness of tourist guides

The COVID-19 epidemic is likely to not only have a lasting impact on the economy of tourism but also on the competitiveness of its individual elements. In this section, we present how tourist guides perceive their own competitiveness and what changes they expect as a result of COVID-19.

Table 5 | Factors of competitiveness of a tourist guide

	Mean	St. dev.	Median	Rank	Type
Presentation skills	4.867	0.343	5	1	Skill
Ability to engage guests	4.800	0.403	5	2	Skill
Politeness	4.783	0.415	5	3	Character
Language proficiency	4.763	0.468	5	4	Knowledge
Punctuality	4.750	0.437	5	5	Character
Organisational skills	4.733	0.482	5	6	Skill
Knowledge of local realities	4.700	0.497	5	7	Knowledge
Ability to improvise	4.700	0.497	5	8	Skill
Ability to solve problems under pressure	4.600	0.558	5	9	Skill
Flexibility	4.600	0.588	5	10	Character
Ability to find a way in an unknown space	4.517	0.567	5	11	Skill
Knowledge of local history	4.483	0.701	5	12	Knowledge
Friendliness	4.433	0.621	4.5	13	Character
Tidy look	4.317	0.676	4	14	Skill
Sense of humour	4.305	0.676	4	15	Character
Ability to work with a microphone	4.167	0.806	4	16	Skill
Tenacity	4.153	0.715	4	17	Character
Knowledge of the guest's country	3.883	0.825	4	18	Knowledge
Cheerfulness	3.000	1.108	3	19	Character
Strictness	2.724	0.951	3	20	Character

Note: 5-point Likert scale. 1 – least important factor, 5 – most important factor. Average ranking – skills 8.38; knowledge 10.25; character 12.75.
Source: Original research

Table 5 shows the ranking of twenty individual factors of tourist guides' competitiveness that were pre-selected based on literature (Zhang and Chow, 2004; Huang et al., 2009) and consultations with experienced tourist guides, and that belong to one of three dimensions of success: skills, knowledge or character. The results are based on a 5-point Likert scale. It can be seen that the guides themselves consider skills to be the most important part of their "competitiveness set", followed by knowledge and character. This is not surprising, taking into account that to have satisfactory knowledge is a crucial prerequisite for obtaining the guiding licence, hence all the guides are at least at a certain level, and they do not see it as the differentiating component. In a similar fashion, while character indeed could be a very significant factor cherished by guests, it is hard to expect the "bearers" of this character (especially those that do not stick out of the average) to realise and admit its importance.

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Skills of different types – presentation, organisation, improvisation, etc. – are therefore quite logically seen as the key differentiator.

The top three most important factors of competitiveness were presentation skills (M=0.487), ability to engage guests (M=4.800) and politeness (M=4.783). In Zhang and Chow's (2004) study of Chinese tourists, these were also found to be important but were outperformed by punctuality, ability to solve problems and knowledge of the destination, all three of which are lower in our ranking. This can be explained by cultural differences and also by the fact that while the present research studies tourist guides' perception, Zhang and Chow studied the tourists' point of view. In personal interviews, the tourist guides indicated that the top three factors were critical for group tours and were necessary to make not only the group satisfied but also the escort or tour manager, who is the one who in the end decides whether the guide's services will be used the future again. Moreover, as one guide put it: "guest engagement by means of interactive presentation is the key for obtaining a nice tip; which, quite honestly, is the reason why we work in this sector".

On the other end of the ranking, knowledge of the guest's country (M=3.883), cheerfulness (M=3.000) and strictness (M=2.724) were considered relatively the least important factors of the guides' competitiveness. Even though it could be argued that each one of these has its place in a guide's "competitiveness set", their role is clearly seen as only secondary compared to some other factors.

Interestingly, the sense of humour performed poorly in the questionnaire. In Zhang and Chow (2004) it was at the very end of the list, but even the authors themselves acknowledged that this was a result of the Chinese culture, where humour is not important. However, this is not in line with the "Western" guests' expectations (see, e.g. Pabel and Pearce, 2016) and shows that the tourist guides' supply-side notion of service quality does not match the guests' demand-side notion of service quality. Of course, other factors, such as good presentation skills, can often substitute for humour, but research shows it is more important than the guides themselves think.

Other factors, which were not included in the pre-selected twenty, but some respondents considered them important, were time management (which could be deemed a part of organisational skills), ability to quickly evaluate guest's interests to make a more tailor-made tour, empathy, charisma, passion, smile and sincerity.

Given the significant impact of COVID-19 on international travel, it can be expected that it will have a long-term negative effect on the competitiveness of tourist guides. The guides are worried mostly about the decline in the number of visitors, decline in demand for guided tours (which can be independent of the general decline in tourism, e.g. due to health concerns) and lower market prices for guiding services as a result of the unequal economic power of guides and travel agencies as their main employers (Table 6).

Based on the questionnaire and personal interviews with Slovak tourist guides, four trends are expected by the profession:

- Lower prevalence of group travel and a higher share of individual travel leading to lower demand for commercial guiding services. This will possibly become a competitive advantage for the "free tours" concept unless governmental measures are taken to limit and tax the activity.

- Faster development of proximity tourism, translating into a higher share of local (not necessarily domestic) guests and less intercontinental travel. This will require adjusting guiding products to suit local needs, e.g. more German-speaking guides might be necessary.
- Partial de-professionalisation of the tourist guide profession – as a result of the possible lower demand, a higher share of tourist guides will see the need for a more stable job, and guiding will be relegated to the second-job position.
- Higher emphasis on tour hygiene, at least from the medium-term perspective (e.g. personal protective equipment, health certificate requirement, payment/tip by touch-free transactions etc.).

Table 6 | Future risks of competitiveness – the level of concern among tourist guides

	Mean	St. dev.	Median	Rank
Decline in the number of visitors	3.617	1.279	4	1
Decline in demand for guided tours	3.339	1.114	3	2
Lower market prices for guiding services	3.321	1.364	3	3
Illegal competition from unlicensed guides	3.211	1.411	3	4
Digital guiding applications	2.517	1.303	2	5
Competition from other licenced guides	2.034	1.129	2	6

Note: 5-point Likert scale. 1 – the smallest level of concern, 5 – the largest level of concern.
Source: Original research

It appears that the guides do not share the optimism of some researchers who suggest the crisis might lead to more sustainable tourism (Gössling et al., 2020) or fairer labour practices in the tourism sector (Ioannides & Gyimothy, 2020). On the contrary, there are concerns that the opposite might happen and disproportionality will even increase. From the results of our survey and interviews with several guides, it clearly follows that they expect their negotiating power to worsen in favour of stronger travel agencies, thus strengthening the position of the strong and weakening the position of the weak. This worry is present all around Central Europe, not only in Slovakia.

When asked about whether the guides expect any of the factors of competitiveness (Table 5) to gain or lose in importance as a result of the COVID-19 crisis, there was no consensus or clear tendency among the answers. The general opinion seems to be that all will remain equally important. Some believe that the ability to work with a microphone might gain significance as more tour groups will be using wireless guiding systems to minimise personal contact with guides and prevent crowding. Others point out that character traits (such as a sense of humour or friendliness) will come to the forefront as the guides will try to find their own market niche in an increasingly competitive environment.

3.4 What does this mean for Central European tourism in general?

A typical Slovak tourist guide is a freelancer who provides services for four or more travel agencies (over 55% respondents). This is a standard state of affairs in tourism where work and contracts are more flexible than in the majority of other industries. COVID-19 will inevitably lead to the demise of dozens of tourism market players and will accelerate the consolidation which is already underway, for example, in the airline industry. In Slovakia, the situation of many travel agencies is already critical (Dennik E, 2020). Czech travel agencies have lost 80% of business in 2020 compared to the previous year (CTK, 2020). In Hungary, the layoffs have begun, and one of the well-established travel agencies has already collapsed (Index.hu, 2020). The situation in Poland is not better either (RP, 2020). These developments indicate that post-pandemic Central Europe will see a very different tourism landscape than the pre-pandemic one.

First, the number of arrivals is almost guaranteed to decrease. World Tourism Organization (2020) expects up to an 80% decline worldwide in 2020, and there are no signs that Central Europe would be any different. Even though it has been suggested (WTTC, 2020) that tourism has been a very resilient sector and its recovery time from crises has decreased from 26 to 10 months since 2001, the current crisis is unprecedented. As a result, the return to pre-crisis levels is not expected before 2022 (OECD, 2020).

Second, international tourism patterns will change. Given the disproportional outbreak of COVID-19 in different parts of the world, it is hard to assess when, for example, American tourists will return to Central Europe. Americans represent the second most important source market of tourists for Vienna (WienTourismus, 2020a) and Prague (Prague City Tourism, 2020), the fourth for Hungary (KSH, 2020), and are also in top ten in Poland and Slovakia. Consequently, tourism services and marketing campaigns will need to be adjusted to attract and better suit the needs of regional visitors.

Third, domestic demand is expected to recover faster than international demand (OECD, 2020). While this does not have the full potential to compensate for the losses, it can help the industry survive, and has significance, especially for Poland, which has the largest domestic market. Domestic tourism can be supported, for example, by means of travel vouchers (the case of Slovakia), restaurant vouchers (Vienna) or targeted marketing campaigns (Poland).

Fourth, touchless solutions to minimise the risk of virus transmission will become the norm. This trend could already be observed in the last years and will accelerate. It includes touch-free payments, smartphone apps for hotel check-in and restaurant orders, higher adoption of voice control software etc.

Finally, similar to what has happened in the airline industry in the last two decades, the tourism sector will experience a wave of consolidation, the extent of which is yet hard to predict. The number of travel agencies (both incoming and outgoing), hotels and restaurants is guaranteed to decrease by means of bankruptcies, mergers and takeovers. This will increase the industry's concentration index, and while it has the possibility to offer lower prices and better services to customers, it can also lead to disproportional negotiating power toward contractors. The tourist guides' concern about lower prices is a demonstration of this.

4 Limitations and Future Research

The present research has standard survey-related limitations – the accuracy of results is based on the validity, reliability and representativeness of the questionnaire. We believe the validity and reliability are assured by the measures taken (as explained in section 2). The representativeness is determined by the response rate. Again, following the literature, it should be satisfactory, even though the risks related to non-response bias cannot be underestimated. Micklewright et al. (2012) have already shown that even response rates of over 80 % are not necessarily associated with higher quality data than slightly lower ones.

The predictive validity of the questionnaire is hard to assess. The COVID-19 pandemic has brought about unprecedented challenges to many areas of globalised life, and tourism is one of the hardest-hit sectors. Even though the tourist guides expect the situation will not recover anytime soon (and airlines and travel agencies all around the world have the same worry), it is impossible to predict the development once (if) the vaccine is available. With the current state of knowledge, any scenario is imaginable.

A logical step for further research would be to administer a much larger survey in the whole area of Central Europe, or possibly with a global reach. This would certainly provide powerful insights into the topic, but would inherently have the issue of a much lower response rate than the current paper. Other option would be to perform an in-depth study of the whole tourism industry in the Central European region, including not only tourist guides, but also other industry stakeholders, such as hotels, restaurants, museums, travel agencies, attraction owners etc.

Conclusions

The COVID-19 pandemic took the world by surprise. In addition to direct epidemiological measures, dozens of governments closed their borders to limit the international movement of people, thus creating an unprecedented crisis in the tourism sector. Central European countries were no exception and closed their borders in mid-March 2020.

Four-fifths of the Slovak tourist guides participating in the study indicated that in the period March-June 2020, their guiding-related income decreased by at least 80%. The expectations of income until the end of the high season (October 2020) based on the current reservations and their slow inflow are very similar. As a result, over half of the guides considered taking measures such as cancellation or temporary suspension of the licence or permanently changing the business field. While only a very small part of the guides actually went ahead and adopted the measures, if the situation persists the share will increase, as the research indicates a high level of concern that by the end of 2020 the respondents will not be able to cover their usual costs of living.

Apart from financial impacts, the pandemic is also likely to have an effect on the guides' competitiveness. Some of the most crucial expected changes include a lower prevalence of group travel, faster development of proximity tourism, partial de-professionalisation of the tourist guide profession and higher emphasis on tour hygiene. General consolidation of the sector – specifically of travel agencies and tour operators – will create bigger market players with possibly stronger negotiating power over not-so-well-organised tourist guides, which might result in lower prices for their services. From among the triad of skills, knowledge and character traits that form a competitiveness set of each guide, microphone skills and character traits might become more important as more tour groups will be using wireless guiding systems and more guides will be trying to find their own market niche.

Even though some authors argue that tourism has become a much more resilient sector than ever before in the last twenty years (WTTC, 2020), the recovery is expected to be slow (OECD, 2020). It has been suggested that the current crisis presents a unique opportunity to build a new tourism sector which would be based on sustainability instead of growth, but the tourist guides – as well as the author of this paper – are pessimistic. In the end, the speed and nature of the recovery will be determined by exogenous factors, such as the development of COVID-19 vaccine and governmental measures.

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