Consumer Sentiment Survey: Wave #2

-Travel Intentions and Expectations for Hospitality Businesses Post COVID-19

(Data collected by October 5, 2020)

Please think about your level of patronage to the following businesses/activities BEFORE March 2020. How often will you visit them for the rest of 2020 compared to before March 2020?

The following activities were rated “**much less than before**” by most of the respondents (more than half of total respondents), especially activities require indoor group gathering.

- Casual/mid-scale restaurants: 59.4%
- Beauty care, SPA, and fitness center: 61.7%
- Shopping malls: 62.3%
- Getaway/weekend cruises (1-5 days): 64.1%
- Meetings, conferences and conventions: 65.1%
- Upscale/fine-dining restaurants: 65.9%
- Theme parks and other outdoor entertainments: 66.3%
- Week/month-long cruises (1-4 weeks): 66.8%
- Night clubs/bars: 68.2%
- Indoor concerts/performance/movie theaters: 70%

However, 57.4% indicated that their levels of patronage to **quick service restaurants** will be “**About the same**” and “**Much more than before**” for the rest of 2020 compared to pre-COVID; For **coffee shops and bakeries, etc.**, almost half (49.6%) of the participants indicated “**about the same**” and “**Much more than before**.”

Among the following health and safety measures/service practices that hospitality and tourism businesses adopt to prevent COVID-19 spread, please select important measures that you believe businesses should implement in the short-term (i.e., from now until the vaccine becomes available) versus in the long-term (i.e., as a new industry/service norm).

Top 10 health and safety measures expected for hospitality businesses in the “**short-term**” (i.e., from now until the vaccine becomes available): (in descending order)

1. Temperature check for customers: 53.8%*
2. Offer health & wellness centric services/products: 51.1%
3. Provide sanitation/safety certification from official organizations: 50.4%
4. Employees wearing masks/ protective gear: 46.8%
5. Touchless service transactions (e.g., online ordering/ticketing): 46.4%
6. Temperature check for employees: 46.2%
7. Social distancing with other customers in shared spaces: 46%
8. Reduce business hours to allow more time for disinfecting: 45.7%
9. Partitions/physical barriers in shared environments: 45.1%
10. Reduce walk-in and increase appointment-only services: 45%

NOTE: *the item was selected by % of total participants.

Top 10 health and safety measures expected for hospitality businesses in the long-term (i.e., as a new industry/service norm).

1. Provide sanitizing products for customers: 69.6%
2. Sanitation report available onsite: 63.9%
3. Reduce food and beverage services (e.g., buffet in hotels, food and beverages on airplane): 61.3%
4. Post signage at the entrance to prevent guests with a fever or symptoms of COVID-19 entering the establishment: 60.4%
5. Reduce visitor volume/capacity: 60.3%
6. Use professional sanitation services: 60%
7. More outdoor spaces: 58.8%
8. Use service robots to reduce human interactions: 51.9%
9. Touchless onsite interactions (e.g., mobile check-in/out; digital menu, cashless payment): 49.6%
10. Provide single use items (e.g., menus, condiments): 48.6%

Please think about local businesses (e.g., restaurants, bars, bakeries, coffee shops), please select three most important factors for you to decide if/where to visit at this moment:

Top rated decision factors:

1. Implementing health and safety measures for workers: 663
2. Implementing social distancing guidelines in store: 642
3. Desired product and service quality: 576
4. Location convenience: 430
5. Competitive price compared to similar businesses: 362

NOTE: *indicate number of respondents who selected this item as a critical decision factor

How likely are you to take a LEISURE vacation OUTSIDE of the U.S. in the next five years?

- 59.1% of participants indicated “Somewhat likely” to “Definitely likely” to take such a trip

How important are the following factors to you when selecting your destination for a leisure vacation outside of the U.S.?

Top rated factors when deciding an international destination (selected by more than 50% of participants):
Social Trust

“I trust the government authorities that regulate and supervise the tourism industry to prevent COVID-19.” (On a scale “strongly disagree” = 1 to “strongly agree” = 7)

● 48.4% indicated: “neutral to strongly agree”

“I trust tourism industry regulators in relation to the licensing of health and control of COVID-19.”

● 55.8% indicated: “neutral to strongly agree”

“I trust that travel service/product providers ensure every necessary step is taken to protect consumers’ health.”

● 62.2% indicated: “neutral to strongly agree”

**NOTE:** consumers express highest trust towards service providers, indicating strong confidence in the industry.

“I’m worried about the potential threat of COVID-19 during travel”

● 79.8% indicated: “neutral to strongly agree”

Perceived benefits of travel:

● “Travel is a positive distraction”: 85.6% rated “neutral to strongly agree”

● “Finding a great place to travel can reinforce positive feelings about myself”: 83.1% rated “neutral to strongly agree”

● “Travel is a way to take my mind off things that are bothering me”: 81.9% rated “neutral to strongly agree”

● “I want to take a leisure vacation soon”: 81.0% rated “neutral to strongly agree”

If you were to travel internationally for a leisure vacation in the next five years, where would you search for information to get inspiration for your destination?

Top rated factors

<table>
<thead>
<tr>
<th>Selected by % of participants</th>
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<tbody>
<tr>
<td><strong>1. Safety &amp; security</strong></td>
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<td><strong>2. Cleanliness</strong></td>
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<td><strong>3. Cost / Price</strong></td>
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<td><strong>4. Value for money</strong></td>
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<td><strong>5. Food</strong></td>
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<td><strong>6. Accommodation</strong></td>
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<td><strong>7. Service quality</strong></td>
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<td><strong>8. Ease of getting to the country</strong></td>
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<td><strong>9. Domestic transportation / Ease of getting around at destination</strong></td>
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<td><strong>10. Natural scenery</strong></td>
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<td><strong>11. Friendliness of people</strong></td>
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<td><strong>12. Environmental quality</strong></td>
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<tr>
<td><strong>13. Cultural / Historical sites</strong></td>
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programs on radio or radio shows
- Telement on TV/radio/magazines/newspapers
- Action e-brochures/e-pamphlets
- Newsletters or e-newspapers
- Exhibition/show/convention
- Advertisement
- Phone/Tablet apps of any travel suppliers
- S/Documentaries
- S/Features in magazines or newspapers
- All travel agents
- Action brochures/pamphlets
- Programs on TV or TV shows
- Action apps
- Networking websites (e.g., Facebook, Instagram, Twitter)
- Sharing sites (e.g., YouTube)
- S, family members or colleagues
- Sites offering travel tips and consumer reviews (e.g., TripAdvisor)
- Booking websites (e.g., Expedia)
- Hotel/Travel agency websites
- Action websites
- Engines (e.g., Google)