

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^a
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: ^a 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):

Top rated factors	Selected by % of participants
1. Safety & security	78.9
2. Cleanliness	70.7
3. Cost / Price	69.1
4. Value for money	68.5
5. Food	64.6
6. Accommodation	61
7. Service quality	60.8
8. Ease of getting to the country	60.4
9. Domestic transportation / Ease of getting around at destination	57.1
10. Natural scenery	56.9
11. Friendliness of people	56.7
12. Environmental quality	51.4
13. Cultural / Historical sites	50.8

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?

