PHILADELPHIA | 2020-2021

Consumer Sentiment Survey

TOWARDS TRAVEL AND HOSPITALITY CONSUMPTION DURING AND POST-COVID-19

STHM
School of Sport, Tourism and Hospitality Management
TEMPLE UNIVERSITY

THE U.S. - ASIA CENTER FOR
TOURISM & HOSPITALITY RESEARCH

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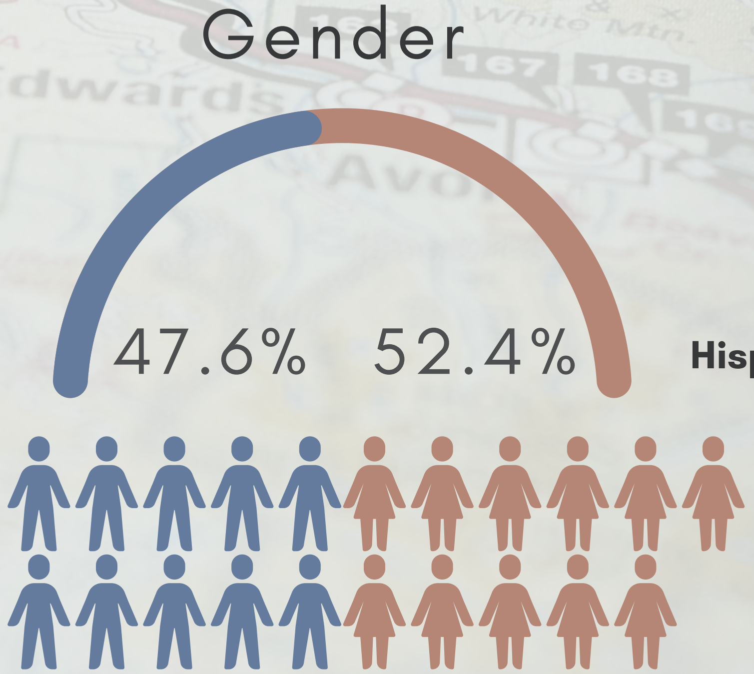
1. BACKGROUND INFORMATION

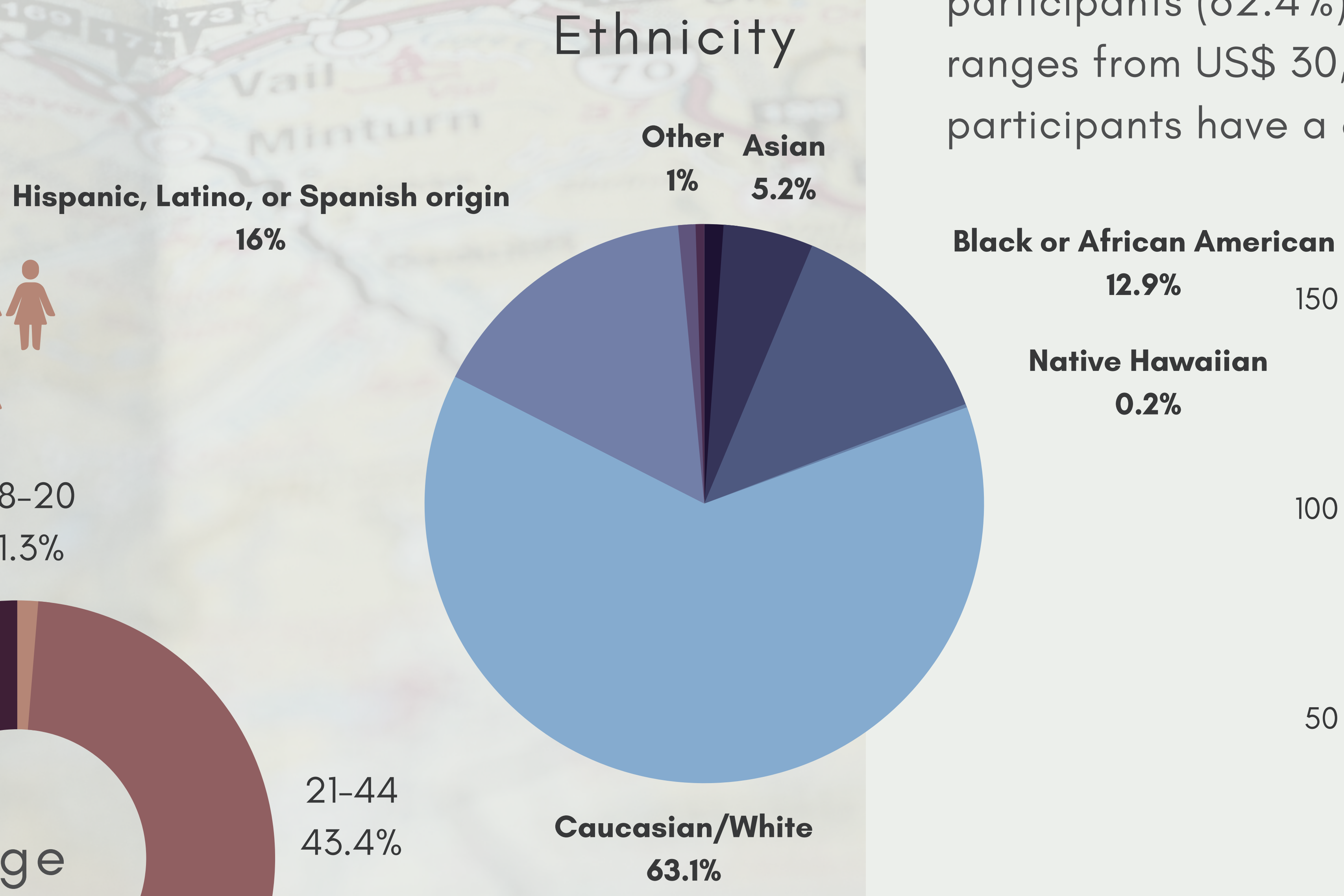
ABOUT THE STUDY

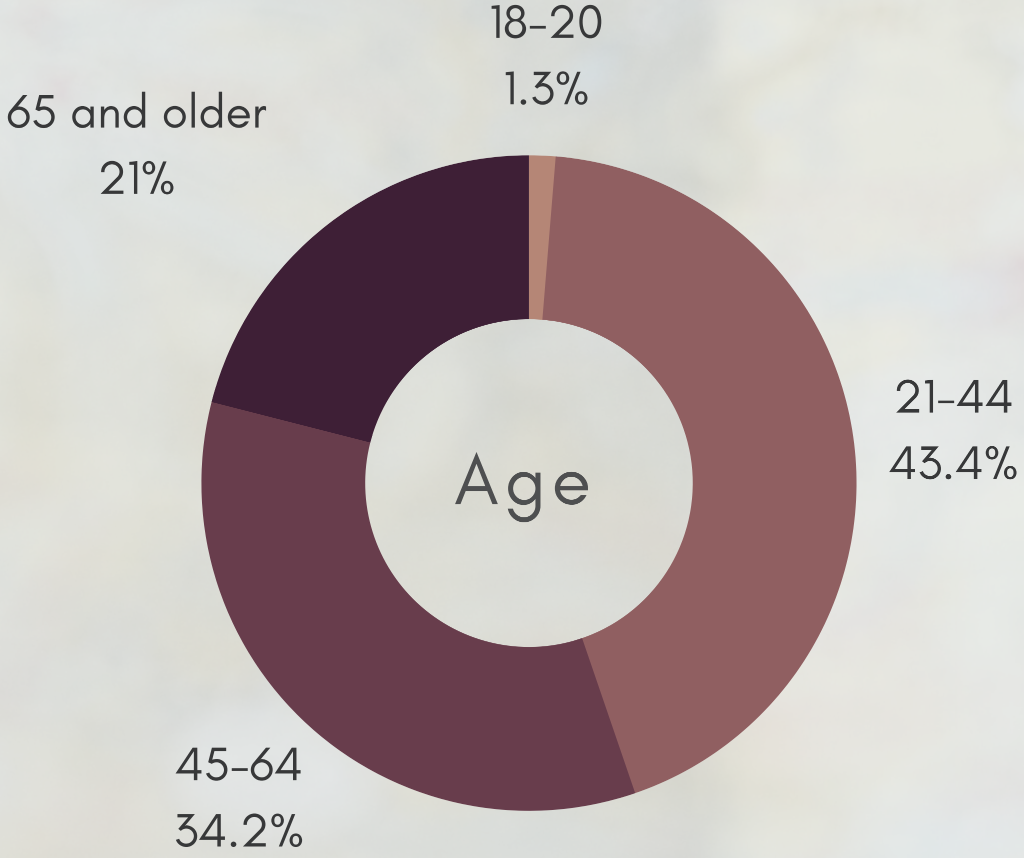
- Since the outbreak of the pandemic, Temple University's School of Sport, Tourism and Hospitality Management (STHM) and the school's U.S.-Asia Center for Tourism and Hospitality Research has run a multi-wave national study on consumer sentiment towards travel and hospitality consumption.
- A research team led by Lu Lu, an assistant professor in the school and Robert Li, professor and director of the center, recently conducted a national survey which explored US consumers' travel Intentions and expectations for hospitality business post COVID-19.
- STHM faculty members Laurie Wu, Yang Yang, Wesley Roehl and Lindsey Lee also helped lead the study.

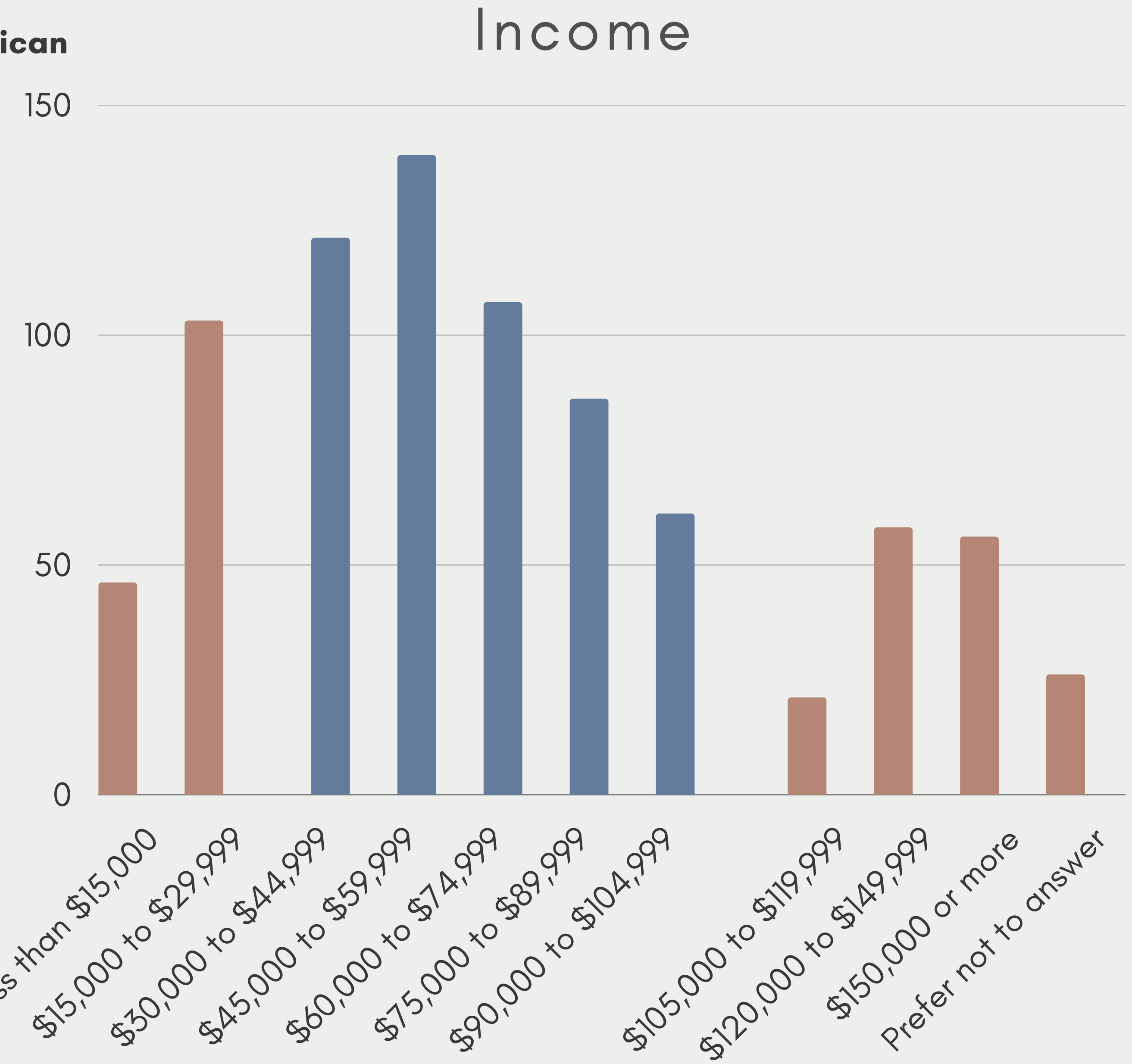
2. SOCIO-DEMOGRAPHICS

The recent wave of survey, conducted in October 2021, recruited a national sample involving 824 U.S. adults following US Census Bureau 2019 demographic distributions on age, gender, ethnicity, and geographic regions. The majority of the respondents are between the ages of 21 and 64. More than two third of the participants (62.4%) respond that their annual household income ranges from US$ 30,000 to US$ 104,999, and 46.72% of the participants have a college degree or higher.



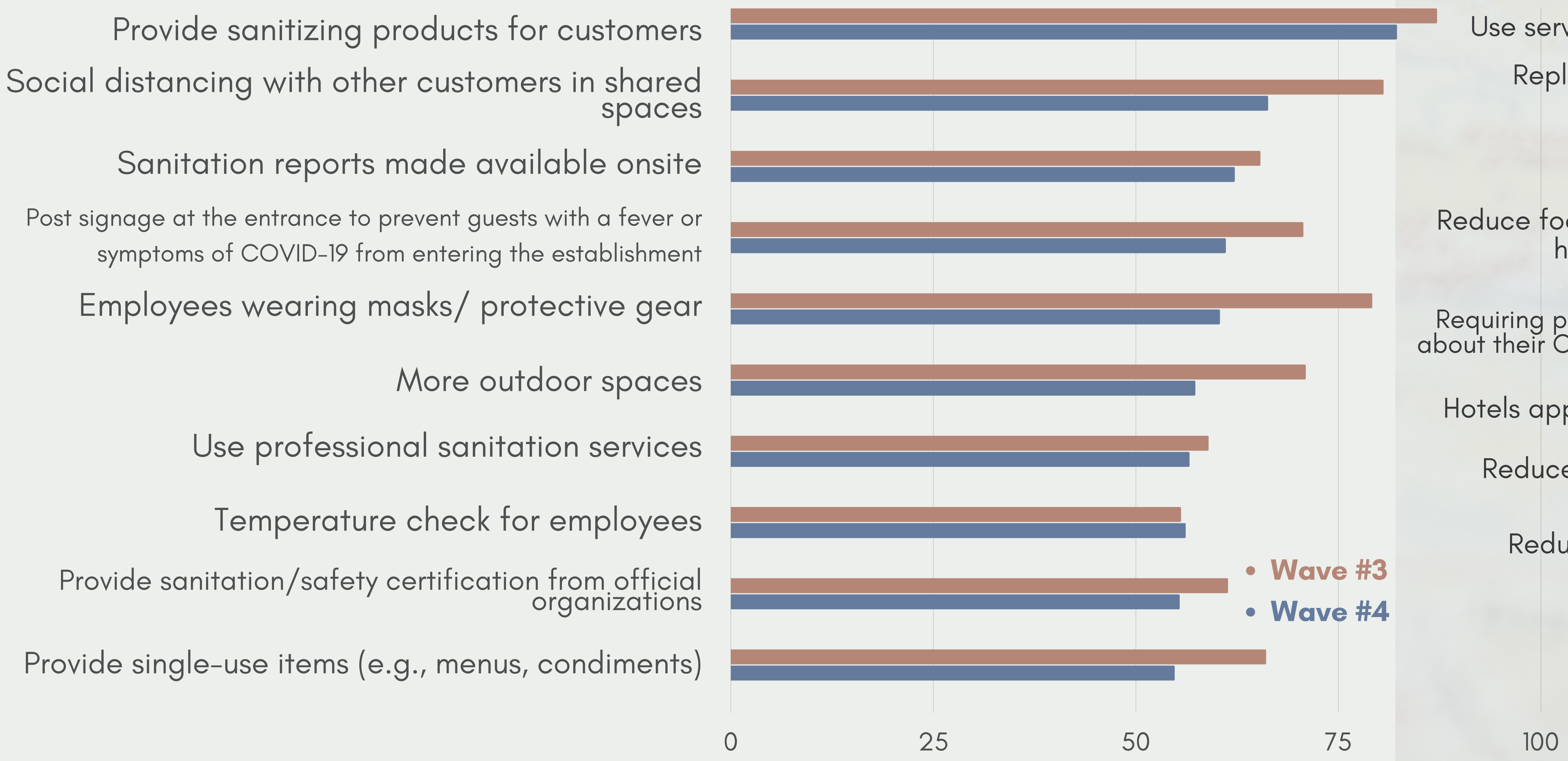




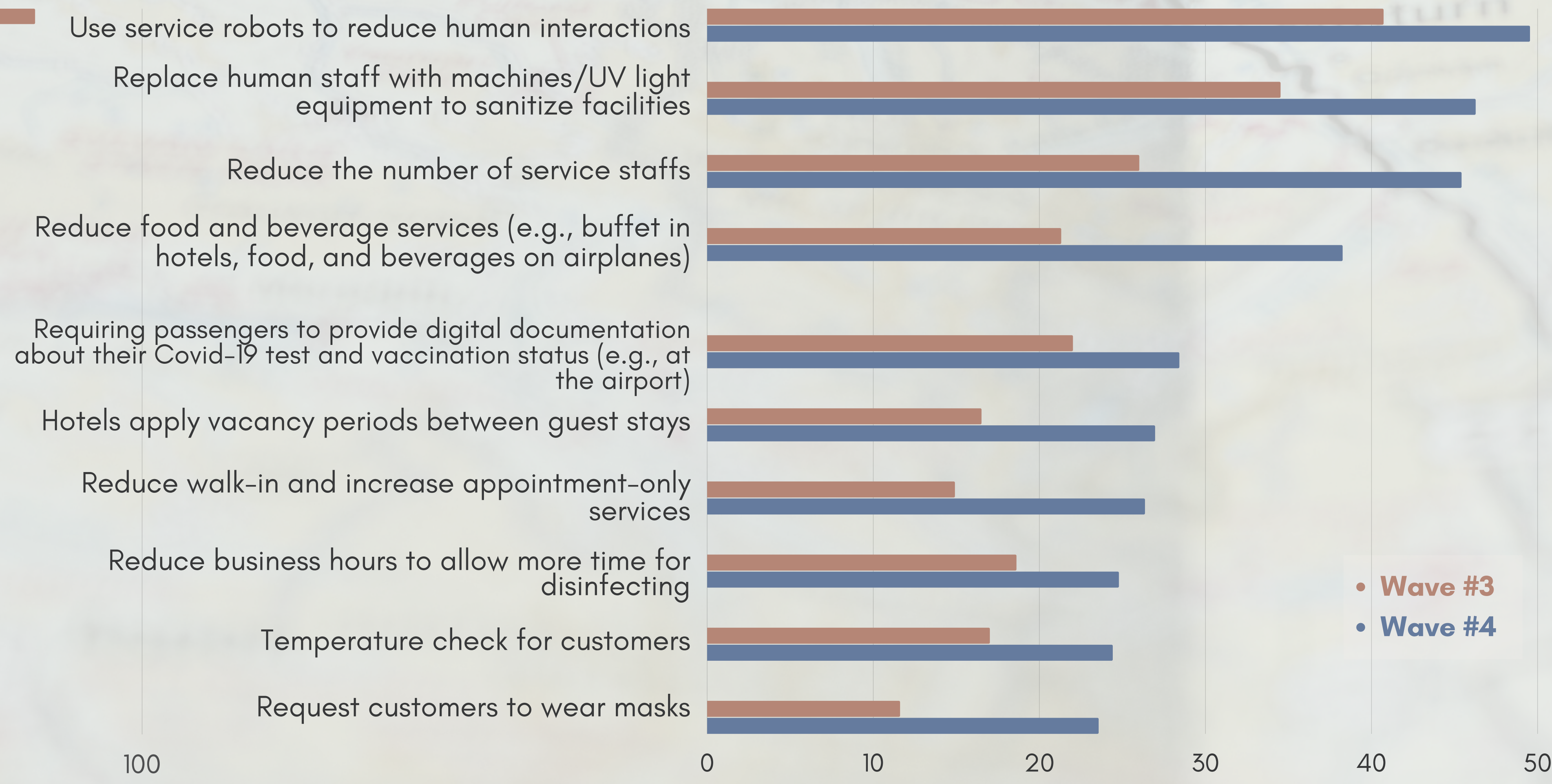


3. LONG-TERM PRACTICE RATIO (WAVES 3&4) HEALTH-RATED AND SERVICE NORMS

PRACTICES IN THE LONG-TERM INDICATED AS "IMPORTANT" (% OF PARTICIPANTS)



PRACTICES IN THE LONG-TERM INDICATED AS "NOT IMPORTANT" (% OF PARTICIPANTS)

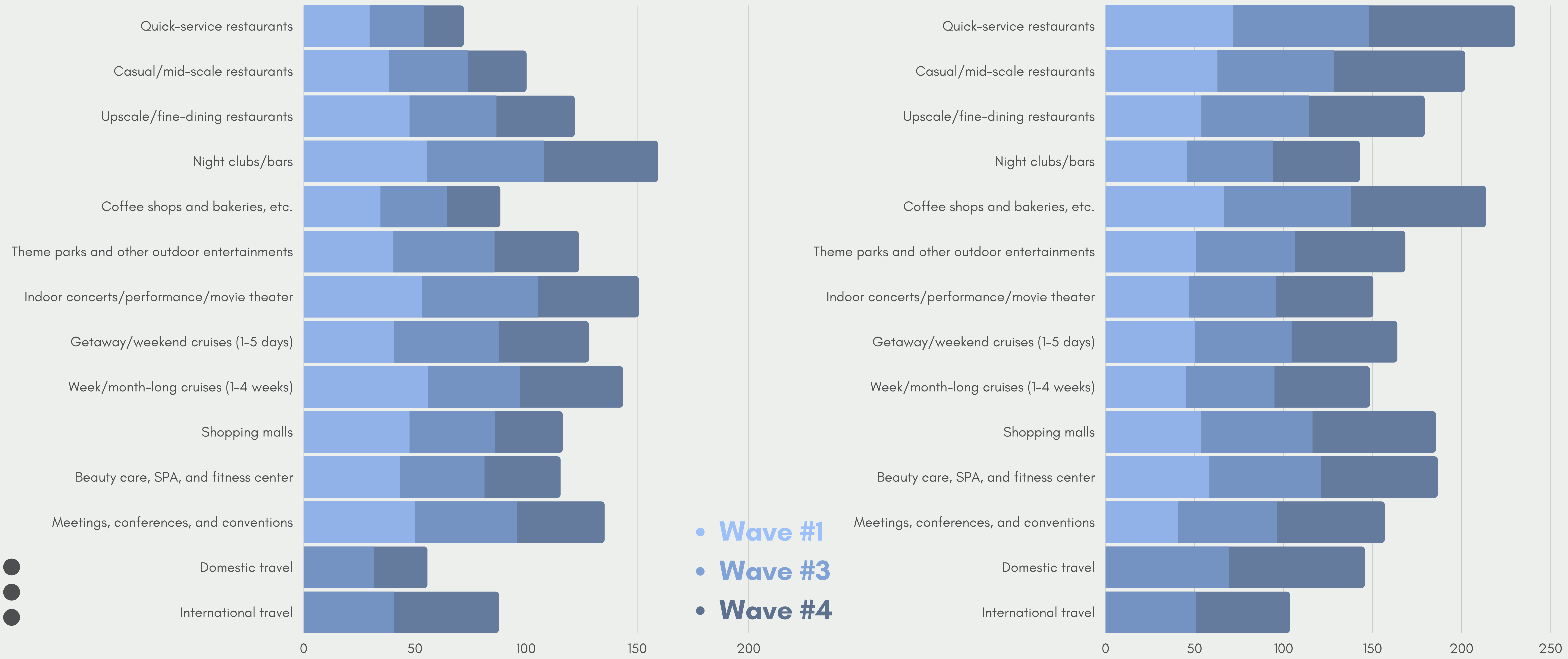


4. BEHAVIOR DURING AND POST-COVID-19 (WAVES 1, 3 AND 4)

WILLINGNESS TO VISIT THE FOLLOWING BUSINESSES/ACTIVITIES IN PERSON FOR THE REST OF THE YEAR 2021, COMPARED TO PRE-PANDEMIC (BEFORE MARCH 2020)

MUCH LESS THAN PRE-PANDEMIC (%)

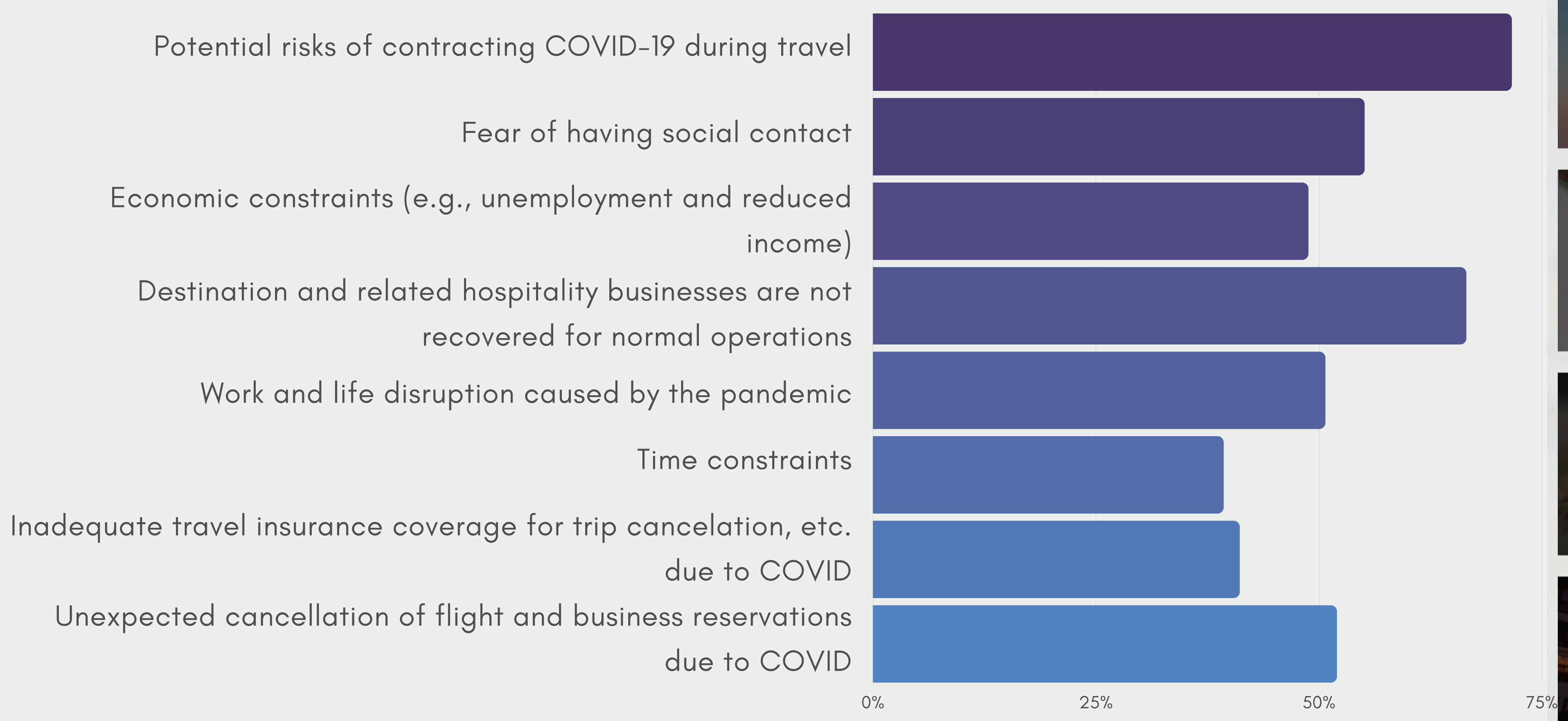
ABOUT THE SAME OR MUCH MORE THAN PRE-PANDEMIC (%)



5. INTERNATIONAL AND DOMESTIC TRAVEL INTENTIONS (WAVES 1 AND 4)

6. CONCERNING FACTORS OF TRAVEL (WAVE 1 AND 4)

% OF RESPONDENTS INDICATED "SOMEWHAT AGREE TO STRONGLY AGREE"



WAVE #1

AVERAGE ON A SCALE FROM 1 = "NOT CONCERNING AT ALL" TO 7 = "EXTREMELY CONCERNING"

- Unexpected cancellation of flight and business reservations due to COVID-19 — **4.74**
- Destination and related hospitality businesses are not recovered for normal operations — **4.68**
- Potential risks of contracting COVID-19 during travel — **4.55**
- Fear of visiting highly populated cities and towns — **4.26**
- **4.14** — Fear of taking public transportations
- **4.06** — Fear of visiting businesses in congregated areas such as shopping malls and restaurants
- **3.15** — Fear of being judged of being irresponsible of traveling during the pandemic

WAVE #4

7. TRAVEL RESPONSIBILITY DURING THE PANDEMIC (WAVE 4)

AVERAGE ON A SCALE FROM 1 = "STRONGLY DISAGREE" TO 7 = "STRONGLY AGREE"

I would closely follow the travel guidance and policies at the destinations	5.89
I would try to learn what I can do to travel responsibly during the pandemic	5.70
I would maintain social distance as much as possible	5.65
I would wear my mask whenever possible	5.35
I would try to reduce unnecessary travel during the pandemic	5.03
I would talk with others about responsible travel during the pandemic	4.83
I would try to convince others to travel responsibly during the pandemic	4.73

8. GOVERNMENT AND INDUSTRY TRUST (WAVE 4)

AVERAGE ON A SCALE FROM 1 = "STRONGLY DISAGREE" TO 7 = "STRONGLY AGREE"

5.40 I would be able to do what is needed to prevent COVID-19 during travel

5.36 I feel confident about protecting myself from COVID-19 infection during travel

5.08 I would be capable of effectively preventing COVID-19 during travel

4.53 I trust that travel service/product providers ensure every necessary step is taken to protect consumers' health

4.07 I trust tourism industrial regulators in relation to the licensing of health and control of COVID -19.

3.76 I trust the government authorities that regulate and supervise the tourism industry to prevent COVID-19

9. IMPORTANT FACTORS FOR INTERNATIONAL TRAVEL (WAVE 4)

ON A SCALE FROM
1 = "NOT IMPORTANT AT ALL"
TO 7 = "EXTREMELY IMPORTANT"

WAVE #4

6.29	Safety&Security
6.16	Cleanliness
6.09	Value for money
6.07	Cost / Price
6.03	Food
6.02	Accommodation
6.01	Service quality
5.91	Ease of getting around at the destination
5.86	Ease of getting to the country
5.76	Natural scenery

10. EXECUTIVE SUMMARY

According to the survey, the importance of long-term practices declined in the recent Wave 4 compared to the results of the previous Wave 3:

- Provide sanitizing products for customers (82.2%)
- Social distancing with other customers in shared spaces (66.3%)
- Sanitation reports made available onsite (62.1%)

More than 70% of respondents noted that they plan to visit the following establishments or engage in the following activities in-person "about the same" or "much more" than before the pandemic (Wave 4):

- Quick-service restaurants (82.3%)
- Domestic travel (76.1%)
- Coffee shops and bakeries, etc. (75.8%)
- Casual/mid-scale restaurants (73.7%)

31% more respondents in Wave 4 compared to Wave 1 expressed their willingness to travel but don't have a plan yet, while the percentage of respondents who plan a domestic/international leisure vacation in the next 3-6 months increased by 22%.

While during the first wave the most concerning factor for travelers was a potential risks of contracting COVID-19 during travel, the recent wave revealed an unexpected cancellation of flight and business reservations due to COVID-19 as the most concerning issue.

Respondents claim to closely follow the travel guidance and policies at the destinations and do what is needed to prevent COVID-19 during travel if they were to travel during the pandemic (Wave 4).

The recent study also revealed that when selecting their destinations for the next leisure vacation outside of the U.S. they consider safety and security, cleanliness and value for money as the most important factors.

11. CONTACT

A broader look at the survey and its results are available here.

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