

Consumer Sentiment Survey – 4th Wave

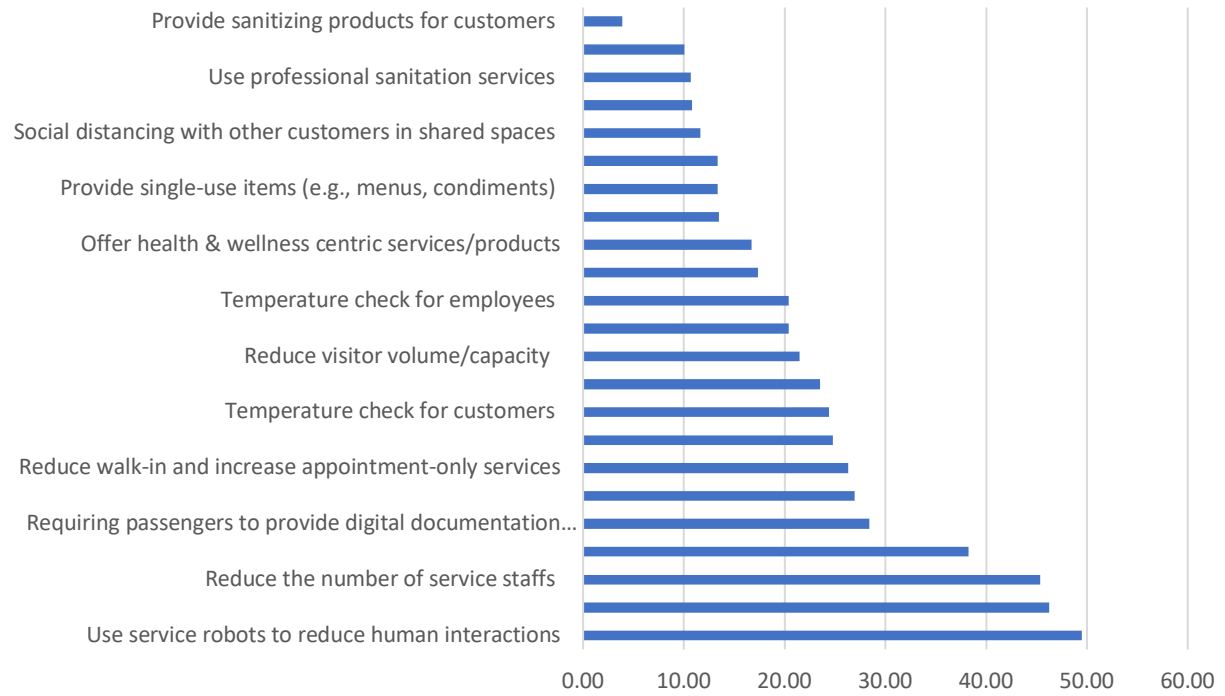
-(Data collected during Oct 27th – Nov 4th, 2021)

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. The recent wave of survey, conducted in October, recruited a national sample involving 824 U.S. adults following US Census Bureau 2019 demographic distributions on age, gender, ethnicity, and geographic regions. Out of the sample collected, 47.6% of respondents are male and 52.4% are female. The majority of the respondents are between the ages of 21 and 64. 17.5% respondents are from the Northeast region, 21.5% are from the Midwest region, 38.8% are from the South region and 22.2% are from the West.

**Please rate the importance of these practices in the long-term when the pandemic is over.
Respondents who indicated these items to be “NOT important”**

Items	“Not important” (%)
Use service robots to reduce human interactions	49.51
Replace human staff with machines/UV light equipment to sanitize facilities	46.24
Reduce the number of service staffs	45.39
Reduce food and beverage services (e.g., buffet in hotels, food, and beverages on airplanes)	38.23
Requiring passengers to provide digital documentation about their Covid-19 test and vaccination status (e.g., at the airport)	28.40
Hotels apply vacancy periods between guest stays	26.94
Reduce walk-in and increase appointment-only services	26.33
Reduce business hours to allow more time for disinfecting	24.76
Temperature check for customers	24.39
Request customers to wear masks	23.54

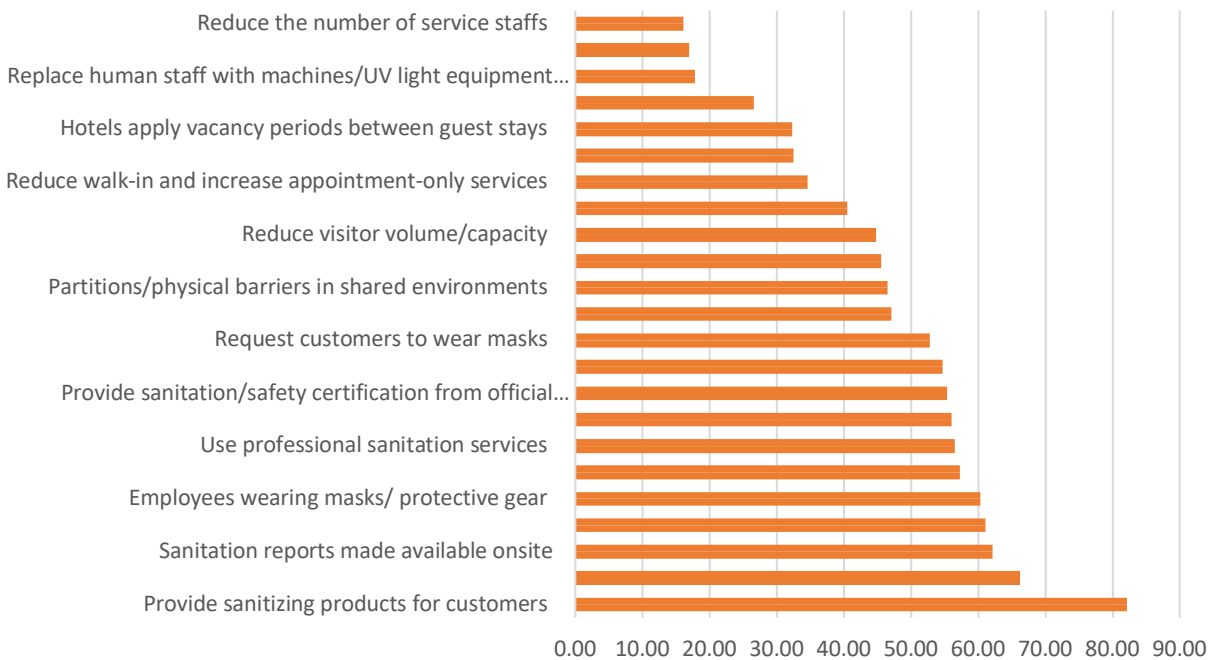
Practices in the long-term ("Not important")



**Please rate the importance of these practices in the long-term when the pandemic is over.
Respondents who indicated these items to be "Important."**

Items	Important (%)
Provide sanitizing products for customers	82.16
Social distancing with other customers in shared spaces	66.26
Sanitation reports made available onsite	62.14
Post signage at the entrance to prevent guests with a fever or symptoms of COVID-19 from entering the establishment	61.04
Employees wearing masks/ protective gear	60.32
More outdoor spaces	57.28
Use professional sanitation services	56.55
Temperature check for employees	56.07
Provide sanitation/safety certification from official organizations	55.34
Provide single-use items (e.g., menus, condiments)	54.73

Practices in the long-term ("important")

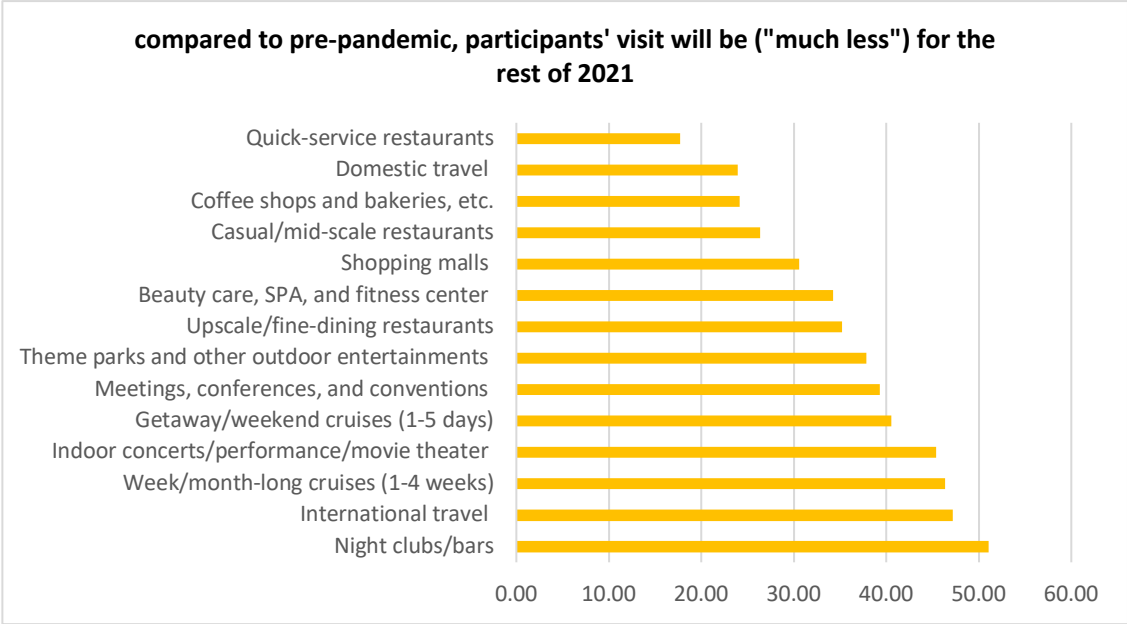


When the COVID-19 pandemic is over, how much would you recommend these following services/practices continuing to be implemented? (On a scale from 1 = “strongly disagree” to 7 = “strongly agree”).

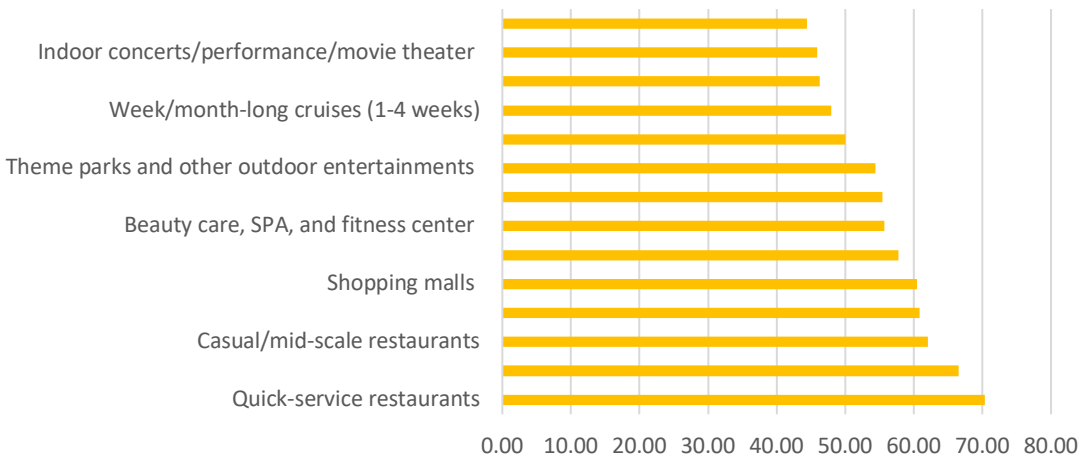
Items	Average score
Contactless/mobile payments and transactions	5.26
Curbside pickup and take-out services at restaurants	5.27
Digital streaming of movies and art performances	4.98
Flexible cancellation and rescheduling policies of flights, hotels etc.	5.66
Having onsite Covid testing services	4.56
Medical services available during guest stay at hotels/resorts	4.97
Reducing direct contact with the housekeeping staff	4.65
Touchless onsite interactions (e.g., mobile check-in/out; digital menu, cashless payment)	5.25
Touchless service transactions (e.g., online ordering/ticketing)	5.36
Using UV disinfecting bots for sanitization	4.62
Virtual access to professional training (e.g., conferences, workshops, seminars)	4.68
Virtual access to social and networking events	4.63

Compared to pre-pandemic (before March 2020), how often will you visit the following businesses/activities in person for the rest of the year 2021?

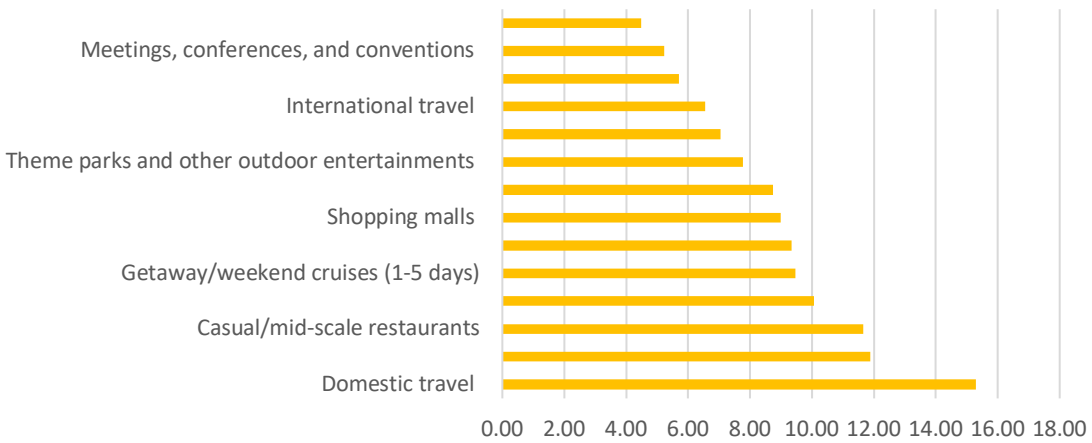
Items	Much less than Pre-pandemic (%)	About the same (%)	Much more than Pre-pandemic (%)
Quick-service restaurants	17.72	70.39	11.89
Casual/mid-scale restaurants	26.33	62.01	11.65
Upscale/fine-dining restaurants	35.19	57.77	7.04
Night clubs/bars	51.09	44.42	4.49
Coffee shops and bakeries, etc.	24.15	66.50	9.34
Theme parks and other outdoor entertainments	37.86	54.37	7.77
Indoor concerts/performance/movie theater	45.39	45.87	8.74
Getaway/weekend cruises (1-5 days)	40.53	50.00	9.47
Week/month-long cruises (1-4 weeks)	46.36	47.94	5.70
Shopping malls	30.58	60.44	8.98
Beauty care, SPA, and fitness center	34.22	55.70	10.07
Meetings, conferences, and conventions	39.32	55.46	5.22
Domestic travel	23.91	60.80	15.29
International travel	47.21	46.24	6.55



**compared to pre-pandemic, participants' visit will be ("about the same")
for the rest of 2021**



**compared to pre-pandemic, participants' visit will be ("much more") for
the rest of 2021**



How soon do you plan to take on an international leisure vacation from now?

Immediately	3.28%
1-2 months after	6.07%
3-6 months after	11.77%
6-12 months after	13.47%
12 months or more	11.65%
I am willing to travel but don't have a plan yet	30.22%
I am not willing to travel within 12 months	23.54%

How soon do you plan to take on a domestic leisure vacation from now?

Immediately	19.8%
1-2 months after	21.7%
3-6 months after	20.6%
6-12 months after	15.2%
12 months or more	4.1%
I am willing to travel but don't have a plan yet	16.9%
I am not willing to travel within 12 months	1.7%

How much do you consider the following factors to be concerning if you were to take a leisure vacation for the rest of the year of 2021? (On a scale from 1 = “Not concerning at all” to 7 = “Extremely concerning”).

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

Please indicate your levels of agreement to the following statements if you were to travel during the pandemic (i.e., anytime from now and before the pandemic is completely under control). (On a scale from 1 = “Strongly disagree” to 7 = “Strongly agree”)

Items	Average
I would wear my mask whenever possible	5.35
I would maintain social distance as much as possible	5.65
I would closely follow the travel guidance and policies at the destinations	5.89
I would try to reduce unnecessary travel during the pandemic	5.03
I would try to learn what I can do to travel responsibly during the pandemic	5.70
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

The following statements are about your feelings about travel for a leisure vacation during COVID-19 (i.e., anytime from now and before the pandemic is completely under control). Please indicate how much you agree with the following statements. (i.e., anytime from now and before the pandemic is completely under control). (On a scale from 1 = “Strongly disagree” to 7 = “Strongly agree”)

Items	Average
I trust the government authorities that regulate and supervise the tourism industry to prevent COVID-19	3.76
I trust tourism industrial regulators in relation to the licensing of health and control of COVID -19.	4.07

I trust that travel service/product providers ensure every necessary step is taken to protect consumers' health	4.53
I would be able to do what is needed to prevent COVID-19 during travel	5.40
I would be capable of effectively preventing COVID-19 during travel	5.08
I feel confident about protecting myself from COVID-19 infection during travel	5.36

How important are the following factors to you when selecting your destinations for your next leisure vacation outside of the U.S.? (On a scale from 1 = "Not important at all" to 7 = "Extremely important")

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

Important factors for choosing a destination

