

The background of the entire page is a photograph taken from the driver's perspective inside a car. The focus is on the side-view mirror, which reflects a road stretching into the distance under a vibrant sunset sky. The colors in the reflection and the background are warm, with oranges, yellows, and reds near the horizon, transitioning to blues and purples higher up. The car's interior, including the window frame and part of the door, is visible in the foreground, framing the mirror and the view beyond.

Travel Consumer Feedback and Reflections during COVID-19

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Research Team

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If you are interested in further data from this study or additional comparison data, please contact angela.durko@tamu.edu



KEY TAKEAWAYS

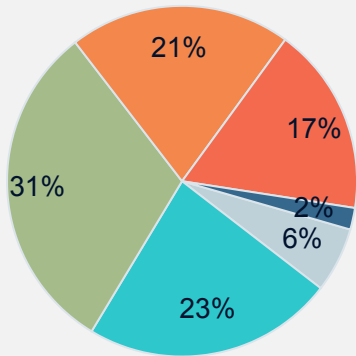
- In the midst of a pandemic, people are changing habits for the better, focusing on the future and finding silver linings amid a world of uncertainty.
- Families near and far are connecting more through technology, seeking comfort in home cooked meals and finding time for self and home improvements.
- Freedom of a normal routine and social connections are some of the most missed things during this time.
- There is still a desire and plan for Summer travel, with most travel predicted by car to neighboring states.
- While people are hesitant to return to using travel services, transparency of increased health standards, customer service empathy and travel refunds may bring consumers back quicker.
- Of those who had travel plans change due to COVID-19, overwhelmingly they had a positive experience with the service provider.

Via a national panel study conducted April 24-27, 2020, 1014 respondents participated in a survey focused on travel and hospitality service industry experiences and personal reflections during COVID-19.

Data was analyzed using 910 fully complete surveys. For open ended questions, thematic analysis was utilized.

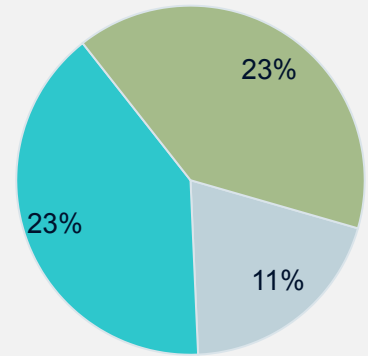
Key Characteristics

Respondent Age Breakdown



- 18-24 6%
- 25-34 23.2%
- 35-44 30.9%
- 45-54 20.5%
- 55-64 17.4%
- 65-74 2%

Income Breakdown

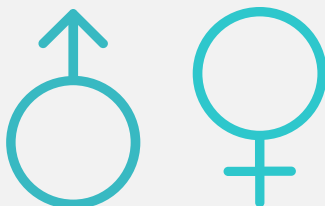


- \$49,000 or less 11.3%
- \$50,000-\$99,999 22.8%
- \$100,000 or more 22.8%



Typical Leisure Travel Per Year

- 22.7% Travel 1x Per Year
- 51.0% Travel 2-5x Per Year
- 11.2% Travel 6-10x Per Year
- 4.4% Travel 11 or More Times Per Year



Gender Breakdown

- Male** 42.6%
- Female** 50.4%
- Self-Described** 7.0%

WHAT DO PEOPLE MISS MOST DURING THIS TIME?

38%

Social Connections with Family & Friends

Overwhelmingly, people miss social interaction, in particular with extended family. *"I miss being able to visit my parents and friends and get hugs from them," "family I don't live with," getting together with friends," "Not being able to see and visit my new granddaughter born last week!"*

Almost 30% of respondents miss shopping, dining out, travel, salons, gyms and spas, with "freedom" to do so frequently mentioned. *"Going to restaurants and the casual conversations you normally have with people when you see them in stores," "Just being able to go browse at stores." "Miss going on a date to watch movies or eat at a restaurant, "Freedom to go to a store anytime of day," "My vacation and so much travel."*

27%

Freedom of Hedonic Leisure Routines

11%

Outdoor Leisure Activities

People reported missing daily walks, bike rides, and runs through their local park or community. Fishing, camping and the beach were on the top list of missed outdoor activities. *"Being able to just take my boys to the park almost daily. Nothing exciting but it got us out as a family and got them tired and ready to eat dinner and relax before bed."*

The most cited larger events people are missing during this time included concerts, spectator sports, church and graduations. Weekly support meetings, movies and casinos were also noted as events people miss.

11%

Large Gatherings for Events

7%

Work & School

Almost 60 people commented that they missed their work and/or school environment. Additionally, some contributed that they missed their income from work, as they had been furloughed or laid off due to the pandemic. *"I miss going to work, just to get out of the house.," "Doing things for my daughter graduation," "seeing coworkers," "Working and having income while my kids were at school."*

A small group even responded they missed nothing during these shelter-in-place times as they enjoyed being home, or had no routine change. *"Surprisingly NOT MUCH..HAVE BEEN CONTENT," "I don't miss anything really I enjoy staying at home," "Nothing. I'm an "essential" worker so I've worked 40+ hours every week since this all began."*

4%

Miss Nothing

FINDING SILVER LININGS IN A TIME OF DARKNESS

Many respondents shared the "Silver Linings" they've experienced and noticed in this pandemic time.

27% Evaluate Priorities

People are using time during shelter-in-place to prioritize work and family habits. Of most importance:

- Slower approach to life
- Less dependence on consumerism
- Avoid over-scheduling activities
- Confidence in "work-from-home" with appreciation for less commute times
- Completing "honey-do lists" of organizing and home projects



26% Family Time

With more at home time, a renewed appreciation for time with family has emerged:

- Family has grown closer
- Siblings working together
- Bonding with extended family through increases in online chats or phone calls
- Family dinner time has resurfaced
- Couples increasing intimacy
- Check-ins with elder family members

"More family time, building intimacy with spouse, communication, and greed has slowed down. Makes you look back and think about your life and lifestyle."

25% Self Reflection

Decreases in commute times, work hours and activities have led to time for self reflection, improvements and future plans.

- Exercising More
- Eating Better
- Setting career and education goals
- Saving Money
- Learning new skills & hobbies
- Deeper respect and appreciation for others- specifically low-wage and essential workers



17% Calls to Action

Positive and negative, people hope the pandemic will bring light to many concerns.

- Environmental needs
- Global healthcare systems
- Advances in education systems
- Political divides
- Reduction in pollution
- Increase of televideo/online resources: medical and others
- Affordable healthcare
- Increased health standards for services

"I think or I hope that people's priorities will be changed such that what is truly important in life becomes more important in all our lives."

3 DYNAMIC BEHAVIOR CHANGE CATEGORIES HAVE EMERGED

A return to the "normal" we knew months ago remains unknown. As such, almost 500 respondents said they had changed/modified a behavior or habit during this time that they will try to continue as a "new normal."

01 SELF CARE AND HYGIENE ROUTINES

Over 50% said they will continue to be much more contentions of their hand washing and cleanliness. Many reported they will try to continue their increased focus on exercise, healthy eating, adequate sleep, and devotion to faith. Additionally, whether saving money by working from home, or strict budgeting due to work reductions, a focus on finances and preparing for the future was apparent.

"I have been spending more time on myself and my goals and will continue to work on this."

"I have increased my savings goals to be better prepared for the future emergencies."

"Been taking supplements to improve my immune system and will continue to do so in the future."

INCREASED TIME AT HOME

People have found a renewed safety in the comfort of home. 30% said they plan to work from home more to cut down on drive times, pollution and be more productive. Respondents have found joy in cooking at home and will continue eat at home more in the future. An increased use and enjoyment of online grocery ordering and curbside food and beverage pick up was observed.

02

"I really like the idea of ordering groceries online and will continue because I'm sticking to my budget better."

"Working from home! hope my employer now sees it is possible."

03 PUBLIC AWARENESS

Almost 20% said the pandemic has made them more aware of their surroundings when out in public and around crowds. They have, and plan to continue to practice social distancing, use an abundance of hand sanitizer, and wear masks in public. They also have started to limit trips to locations where large groups are expected.

"I doubt I'll ever be able to pump gas without a glove again!"

"Keeping Clorox/Lysol wipes with me always bc u can never be to careful now."

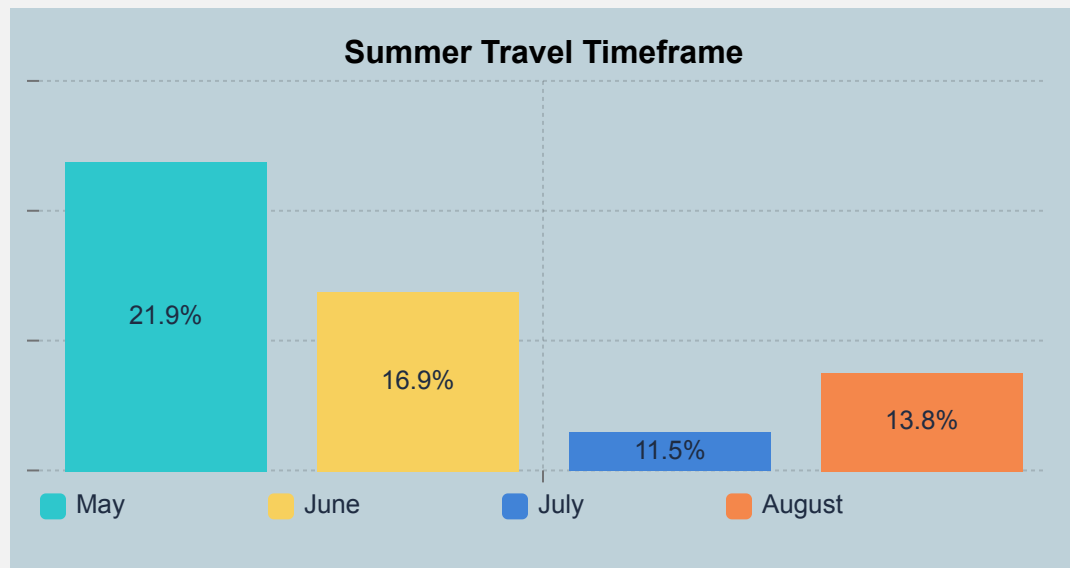
NOT ALL TRAVEL PLANS ARE ON HOLD

47.5% of respondents had yet to cancel plans for travel this year. Of those who had not canceled their travel plans:

- ▶ Almost **60% plan to visit another state this year**
 - ▶ **14.6% plan in state travel this year**
 - ▶ **13.5% still have international travel plans**
- ▶ Almost **8% plan to travel to Mexico or Canada**
 - ▶ **3.5% may still visit a US Territory (to include Guam, Puerto Rico, & US VI)**



For those with travel plans this Summer, when are they going?



WHAT WILL BRING CUSTOMERS BACK?

35%

ENHANCED CLEANING MEASURES

Almost 250 respondents suggested enhanced and continuous rigorous cleaning become the norm. Specifics included *"deep sanitizing and cleaning between each and every flight."* *"Providing cleaning wipes to all passengers and guest."* *"Post health inspection reports and enhanced cleaning methods."* *"Show us what you're using to clean and the changes you've made."* Most noted were hotels, airlines and cruise ships.

+10%

FOLLOW CDC GUIDELINES- MAKE THIS MANDATORY

In addition, another 10% added they would need services to adhere to CDC guidelines before they consider returning. This included requiring face masks and social distancing measures be enforced. Most noted were the airline industry and large events (sports and concerts)

18.8%

CUSTOMER SERVICE IMPROVEMENTS

Almost 20% of respondents suggested improvements with customer service and service recovery measures. Of most suggested, respondents wished to be treated fairly when travel plans had to be changed, and asked for an increase in empathy and responsiveness from the provider. Specifically customers asked for *"flexible change plans," "reasonable and fair computation," "proactive measures by contacting guests whose plans had to change."*

13.7%

TRANSPARENCY OF CURRENT AND FUTURE PLANS

Respondents are frustrated with "unclear," "ever changing," and "non existent" plans for businesses they dealt with. Transparency of safe operating systems, notification of guests if a positive case is traced to the business, and policies ensuring safety for families were most cited.

13.2%

DISCOUNTS!

Almost 14% of respondents noted "discounts," "cheap fares," and "added value amenities" would entice them back to the travel industry sooner. Most mentioned in this category were airfare and cruises.

9.2%

NOTHING

Under 10% admitted there was nothing that would bring them back to the industry at this time. Without "a cure for Coronavirus," or "vaccines," they have decided not to return to using travel services at this time.

SLOW RETURN TO SEVERAL LEISURE ACTIVITIES

Overwhelmingly, respondents are cautious of a return to many leisure activities, and feel they are not alone in this thinking. Activities respondents indicated they will be very slow to extremely slow to return included:



63.8% Cruising



62.9% International Travel by Plane



56.2% Large Events (concerts, sports)



54.6% Mass Tourism Attractions



51.0% Domestic Travel by Plane

FASTER RETURN FOR SOME LEISURE ACTIVITIES

While a fast return was not the majority consensus, there were leisure activities respondents felt they would return to quicker than others. Again, many indicated an "average" return to activities.

Activities where a more positive and faster return may be expected:



36.6% Extended Family Gatherings



36.1% Domestic Travel by Car



31.2% Return to Restaurants & Bars

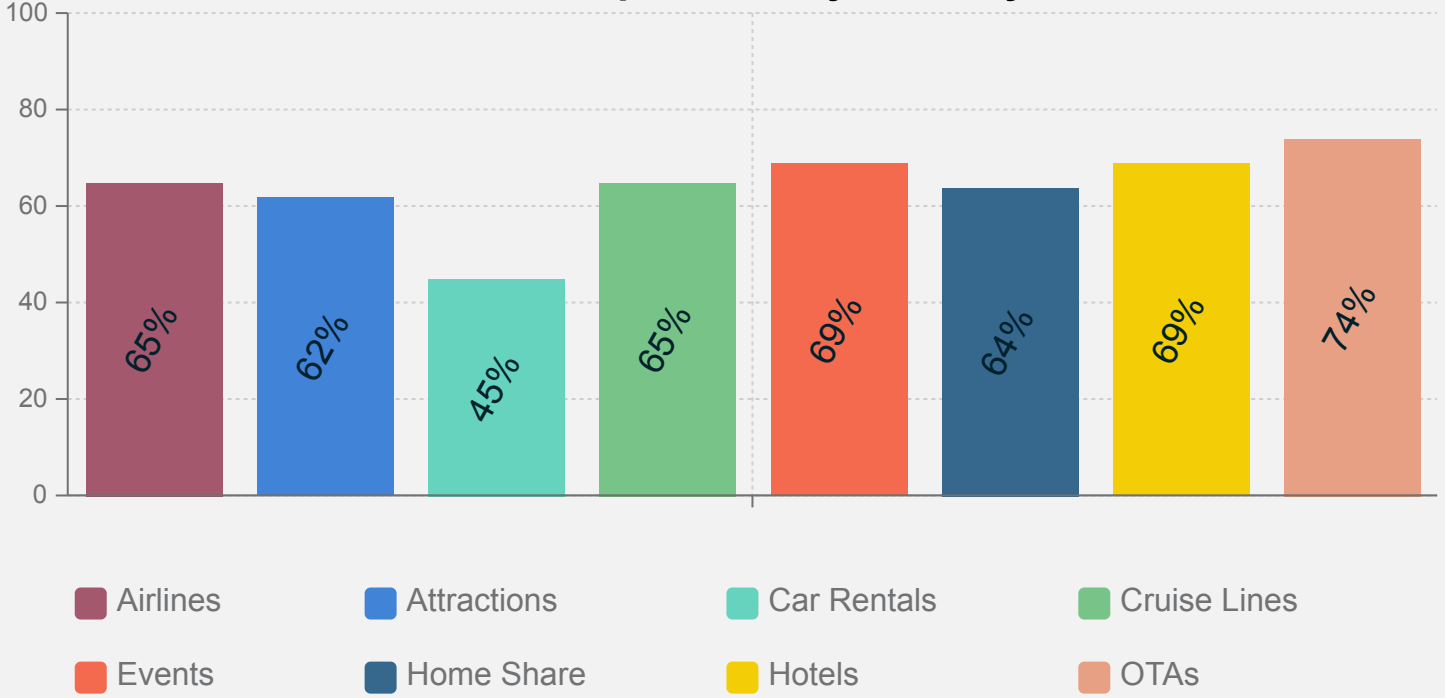


28.8% Outdoor Leisure Activities

GOOD NEWS FOR SERVICE PROVIDERS

Due to Coronavirus related impacts, 54% of respondents cancelled or changed travel with an industry provider since March 2020. Travelers reported positive experiences by industry when plans changed.

Positive Experience by Industry



63%

Reported an overall Positive Experience when changing or cancelling plans

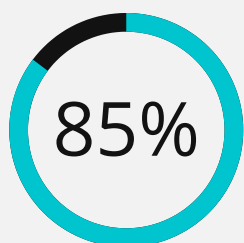


OUTCOMES OF SERVICE RECOVERY

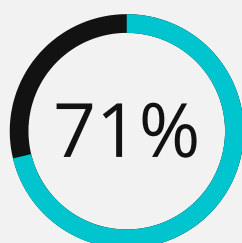
For those who changed or canceled travel plans with a service provider, the service recovery customers received varied from refunds and credits to a lengthy wait for an answer.



When customers viewed the change of plans as handled positively:

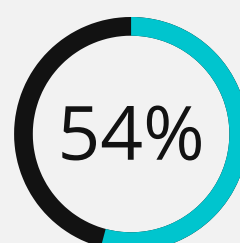


Would use the company again in the future

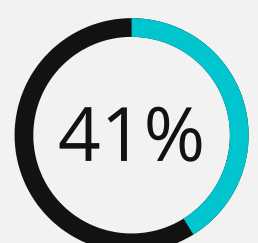


Have a more positive view of the company now

When customers viewed the change of plans as handled negatively:



Would use the company again in the future



Have a more positive view of the company now

Most Important Factors Contributing to Positive Change Experience

- 81% Service representative was courteous to me
- 80% Company showed flexibility in dealing with my problem
- 79% Service representative was honest with me
- 79% In resolving my problem, the provider gave me what I needed

76%

Would positively recommend {this company} to others



Most Important Factors Contributing to Negative Change Experience

- Only 46% said the offer they received was fair
- 47% felt, given the circumstances, the provider offered adequate compensation
- Only 50% agreed the company showed adequate flexibility in dealing with the problem
- 50% In resolving my problem, the provider gave me what I needed

52%

Would write a negative review about {this company}

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