Travel Consumer Feedback and Reflections: Onset of COVID-19

Industry White Paper: Preliminary findings of consumer perceptions focused on service recovery, return to travel, reflection of silver linings and changing behaviors during a pandemic.

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To understand consumer perceptions of changes to travel due to COVID-19, a national panel study was conducted April 24-27, 2020. 1014 respondents participated through a panel host, and data was analyzed using 910 fully complete surveys. For open ended questions, thematic analysis was utilized.

This research was conducted to understand how the industry is being perceived when dealing with travel changes, what service recovery options are being utilized, intention to return to services and field suggestions from consumers for industry.

Specific data is included in the accompanying white paper and additional data is available upon request. Following are key theme areas uncovered through this research.

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Overarching Key Themes for Industry. Further details and data in accompanying White Paper.

- Respondents are reporting to adhere to a slower approach to life, one that is less dependent on consumerism and an avoidance of over scheduling activities. Destinations that can offer a "simpler" experience should focus on effectively communicating that benefit to a specific (and seemingly growing) market segment.

- Even though people are spatially distant, respondents reported that family bonding activities were more frequent and with more (extended) family members through social and virtual means. This could suggest that companies offer or contribute to a more family inclusive experience, either by the activities offered or the costs associated with the experience.

- People are using this time for personal health, reflection and growth. Similarly, respondents revealed a greater appreciation for "front-line" and essential workers. Companies must focus on providing experiences which contribute to physical, spiritual and mental maintenance and growth. In addition, demonstrations of generosity and genuine appreciation for healthcare workers, educators, and low-wage essential workers would likely result in more positive perceptions of brands.

- Respondents overwhelmingly cited cleanliness (35%) and customer service enhancements (18.8%) as most important factors when deciding to return to industries specific to travel. Per respondents, industries should focus on being open and honest with customers about operations moving forward, have strict adherence to cleanliness and demonstrate empathy toward customers.

- Transparency in how businesses intend to increase and monitor health and safety protocols is one of the most important aspects customers want to see as businesses reopen. To increase rate of return, it was suggested businesses adhere to CDC guidelines, as customers and staff wear face masks and have hand sanitizer abundantly available.

- Respondents indicated a "wait and see what others do" approach to specific travel activities. With a hesitation to return to mass industry provided transportation and events, it may suggest a focus on "buy now, travel/attend" later marketing.

- There does appear a positive and quicker anticipated return to travel for family gathering and travel by car. Industries may do well with promotion of family events in a drive market. This may help drive the "support local" campaigns and a return to use (within guidelines) of local restaurants and beverage establishments.

- Although the majority (75%) of respondents agreed that the change in travel plans was due to factors uncontrollable by the service provider, when the customer service representatives showed more empathy and understanding, the overall satisfaction with the travel change experience was more positive. Ongoing customer service training and "disaster" training must emphasize the power of empathy.

- The majority (76%) of those with a positive experience indicated they would recommend the company to a family or friend. Those with a negative experience were more inclined to write a review of the company on social media. In an age where one customer's story can be shared with thousands of potential customers, it is crucial for industry to create positive recovery experiences and responses.

- Customers whose expectations were met or exceeded with a full refund and likely less partial refunds or credits were more satisfied with the travel change policies. Furthermore, respondents (37%) suggested that full refunds would incentivize them to work with a company again. Companies that have the means to provide for a quick and full refund will likely be remembered as a trusted industry provider. Combined with a genuine and empathetic approach, these actions could provide for an opportunity for a company to differentiate themselves.

- Over 50% are using this time to reflect on their diets and exercise and say they will try to maintain these healthy habits in the future. This may lead to increases in demand for healthy food options when they return to restaurants, and increased use of gyms, health spas and workout areas at hotels.

- They also report an increased use and enjoyment of online grocery ordering and curbside food services. With people suggesting they will cook at home more, meals to go and meal prep services may increase in demand. Restaurants who fare well with curbside ordering, may consider implementing this for the future.

- Of those able to, respondents report they are saving money by not driving to work, spending while services are closed or traveling. This may offer an increase in discretionary funding for hedonic and leisure activities once consumers feel safe to return.

- For those who are fortunate to be able to, some respondents have found an affinity for work from home/remote work and say they will try to implement this in their weekly routine once their jobs fully reopen. This may reshape the event and business travel sector, with more reliance on smaller gatherings and incorporation of virtual audience participation.

- A silver lining people see amid the pandemic is an increased attention to environmental concerns. Noted throughout were comments about the reduction of pollution, cleaner air and wildlife benefiting from a reduction in road, air and cruise travel. This is prime time for industry to focus on a better balance between tourism and protection of nature, environment and wildlife.

- Last with an increased reliance on virtual experiences and appointments through education, work and medical needs, a call to action to provide (or enhance) reliable network connections to remote or underserved regions was noted.