Post COVID-19 Travel behavior study

Planning and Research Services
Tourism Council of Bhutan

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1. Background and Objective

Since the COVID-19 pandemic began in late 2019, the world has witnessed every increasing cases of the virus. Bhutan was not an exception and witnessed its first case of COVID-19 on March 5th, 2020. Since then, travel restrictions for all incoming tourists has been implemented from March 7, 2020 which was followed with the closure of all international land borders from March 23, 2020. This has greatly impacted the socio-economic situation of the country and the tourism industry was the hardest hit as is the case globally.

The overall visitor arrivals have dropped by 91% for 2020 compared to 2019 with 28,937arrivals in 2020 compared to 315,599 arrivals in 2019. MDPR paying tourists' number dropped from 72,199 in 2019 to 6,876 in 2020. Similarly, gross earnings from MDPR tourists reduced from USD 225.87 million in 2019 to USD 19.84 million in 2020 while direct revenue to the government was USD 2.63 million in 2020 compared to USD 27.23 million in 2019 indicating more than 90 % drop. Approximately, a total of 50,737 employees in the tourism sector have been impacted due to the outbreak. Thousands of hotels, handicraft shops, restaurants, and other business that depend on tourism have also lost their livelihood.

This has made it critical to reopen tourism, but in a safe manner. Therefore, the objective of the study is to assess the situation with the potential travelers with regard to COVID-19 and understand the possible travel behavior post COVID-19. Since the closure of tourism due to COVID-19, many countries are looking at how to safely open tourism. However, majority of the studies has been done form the point of view of policy makers. Therefore, it is important to get the view of the tourists themselves as well. Without getting inputs from the tourists themselves, simply opening tourism for the sake of opening could result in failure. By getting inputs from the tourists themselves, tourist destinations could take their views into consideration so that tourism can be opened safely and successfully.

1.1 Literature Review

It is well known that tourism is an activity that contributes to the development of many countries, but despite its economic strength, tourism remains one of the most sensitive and vulnerable sectors to internal and external crises (Sönmez, Apostolopoulos, & Tarlow, 1999).

Historically tourists' destinations have faced numerous crisis both natural and man-made. Even though tourism industry faced crisis like terrorist attacks, health crises like SARS, natural disasters like tsunami, volcanic eruption, hurricane, but it has always recovered eventually. However, compared to past crisis, the current COVID-19 crisis seems to be unprecedented because its impacts have not spared any country.

According to Reda (2018) a destinations ability to react promptly in restoring stability determines it resiliency making crisis management very critical. The three steps on crisis management are planning and preparation before the crisis, managing crisis during the crisis and post-crisis resolution (Ritchie, 2009). Safety is one of the most important factor for travelers according to Maslow (1943). Risk perception is of the utmost importance in the tourism decision-making process (Sönmez & Graefe, 1998).

According to Yousaf, Amin, & Santos (2018), a Tourist destinations ability to attract visitors depends on its ability to provide a safe and secure environment. According to studies, five major risk factors related to tourism are war and political instability, terrorist attacks, crime, natural disasters and health concerns.

Some new travel behavior as a response to crisis include favoring outdoor activities (Wen, Huimin, & Kavanaugh, 2005), and hygienic conditions (Higgins-Desbiolles, 2020). The most important question after the resumption of tourism is what will be the new travel behavior. Therefore, it is important for policymakers to develop a strategy to address the news tourist behavior. So this survey aims to identify some of the new tourist behaviors and expectations once travel resumes.
According to some studies, it has shown that COVID-19 has influenced several travel habits like avoiding group travel, travelling with insurance, and importance of health and hygiene condition at the tourist destinations. Travel spending is also likely to be impacted due to economic impact as a result of COVID-19.

1.2 Sampling and Study Population

A mixed method, cross-sectional survey was used; whereby both the quantitative and qualitative data was collected using Google form survey instrument. The objective was to gather both quantitative snapshot of the descriptive statistics as well as details about respondent's opinions about visitors' expectations post COVID-19.

The population is any potential travellers. Convenience sampling was used as it is both cost and time effective. Self-administered online survey was administered using google forms and emailed to potential travelers.

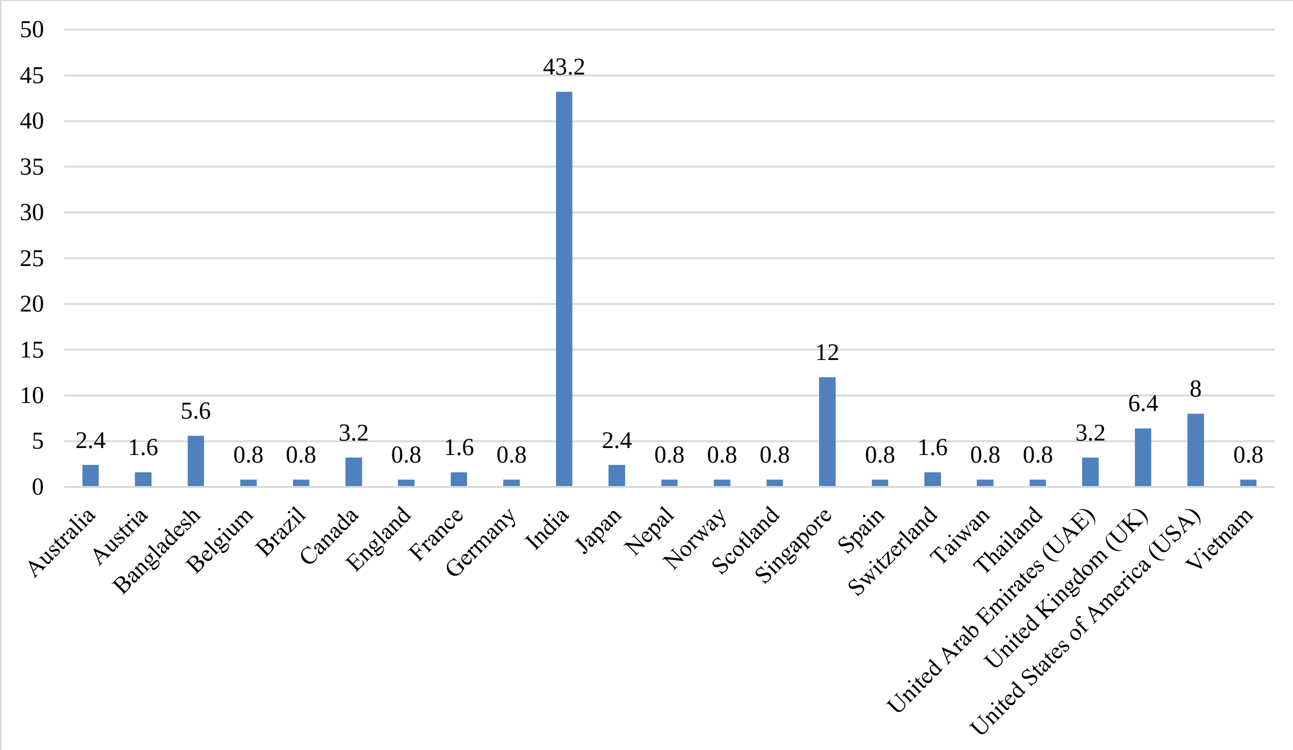
1.3 Survey administration and respondents

134 respondents completed the survey conducted from 04 December 2020 till 06 January 2021 using Google form survey instrument. Survey links were sent to potential tourists with the help of ABTO and also through TCB directly. Initially, despite ABTO sending survey link to travel agents to share it with their guests, only 33 respondents responded to the survey. So email with survey links was sent to potential tourists. (The email list was gathered by Planning and Research section during past Visitors Exit Surveys). Finally, we were able to get 134 responses out of which 125 were found usable during the data cleaning process.

2. Survey findings/results

2.1 Respondents profile

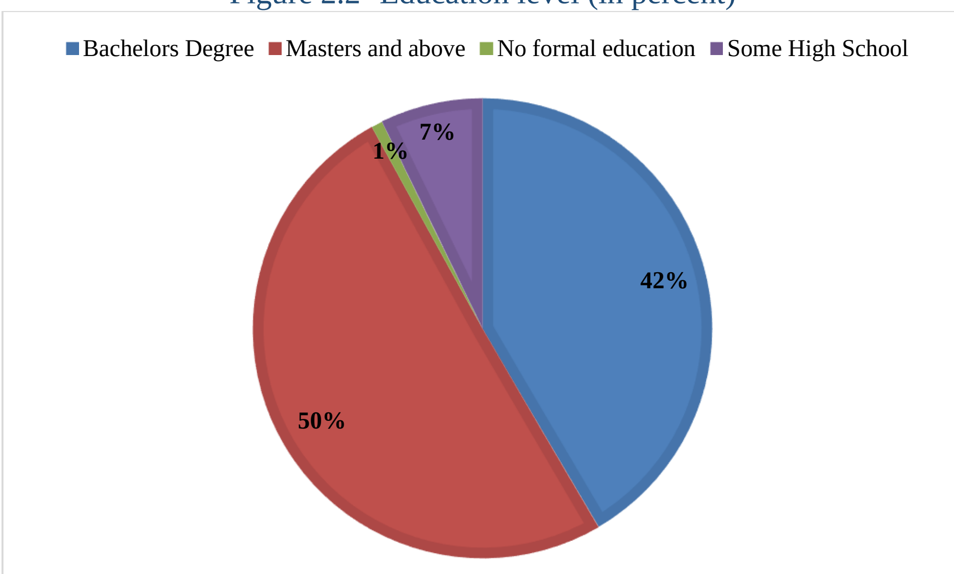
Figure 2.1- Respondents profile (in percent)



The survey saw respondents from 23 countries with maximum respondents from India, Singapore, United States of America (USA) and the United Kingdom (UK).

2.2 Education level

Figure 2.2- Education level (in percent)

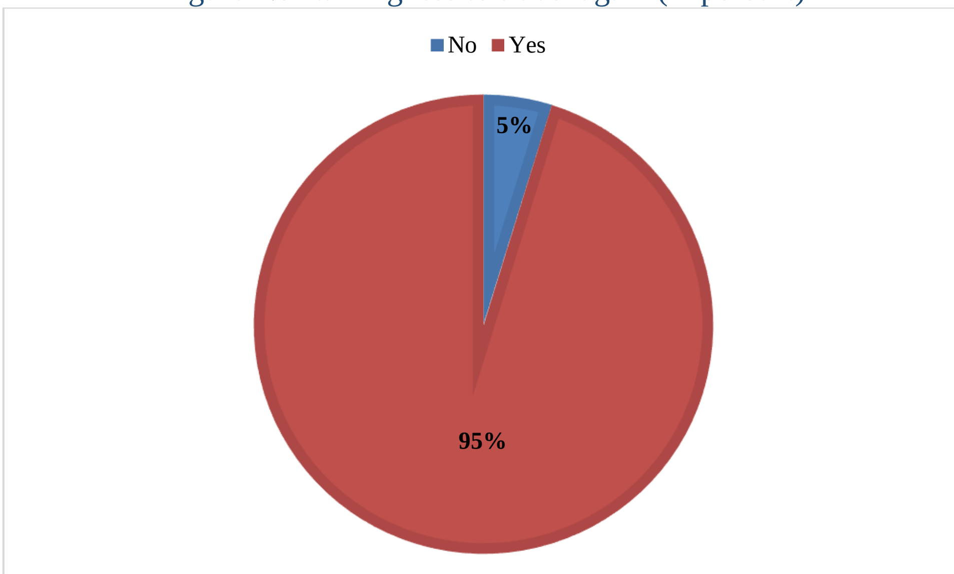


Half the respondents had Master's degree and above while only 1 % did not have any formal education.

2.3 Willingness to travel again

When the respondents were asked on their plan to travel again, an overwhelming 95% of the respondents indicated that they plan to travel again.

Figure 2.3- willingness to travel again (in percent)



2.4 Timeline for travelling again

For those respondents who said they plan to travel again, a follow up question was asked to know how soon they plan to travel again. 69 % of the respondents indicated that they plan to travel within one year, while 31 % said that they would travel only after one year.

Figure 2.4- timeline for travelling again (in percent)

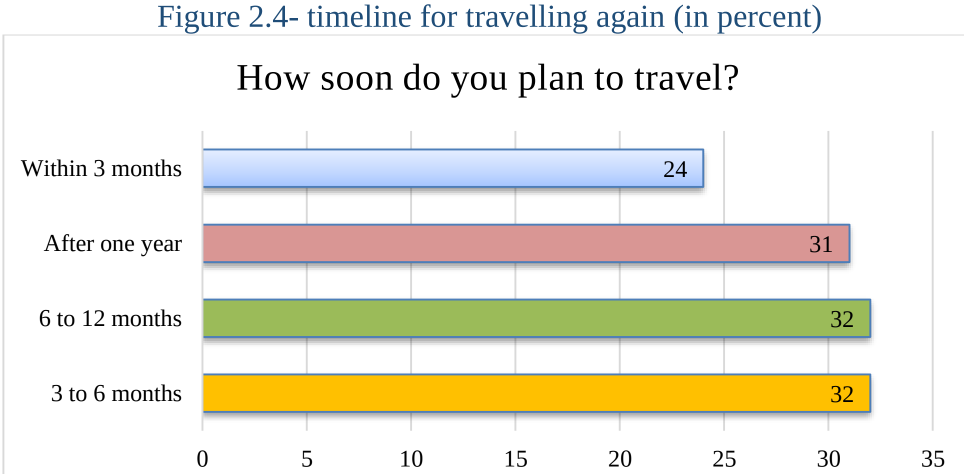
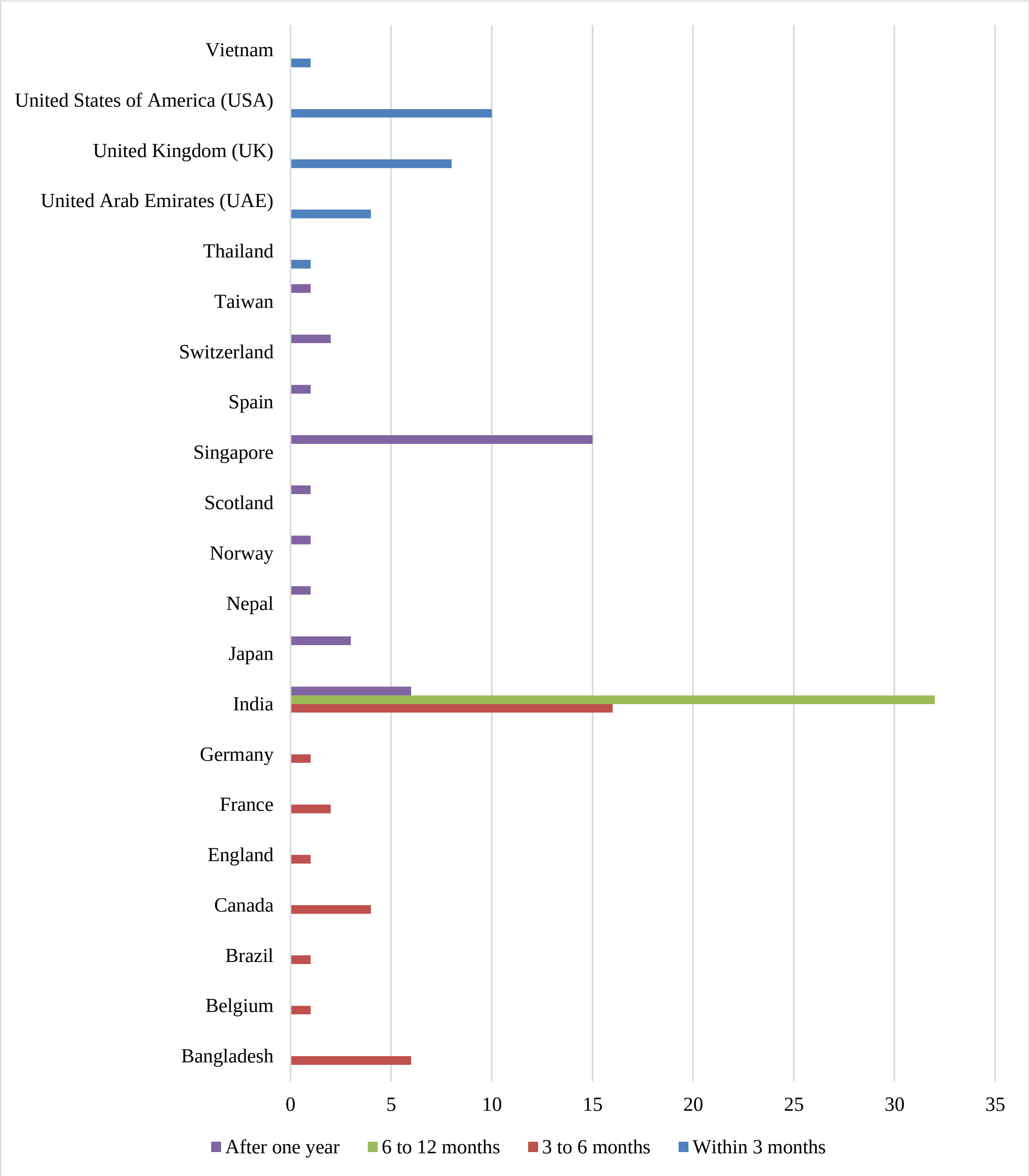


Figure 2.4.1 – Timeline for travel by country (in number)



All the respondents from UK, USA, Thailand, Vietnam and UAE indicated that they are willing to travel within three months while all the respondents from Bangladesh, Belgium, Brazil, Canada, England, France, and Germany indicated willingness to travel between 3 and 6 months. Majority of the respondents from India are willing to travel within one year.

2.5 Choice of travel destinations

When the respondents were asked on their destination choice for their travel, the highest number of respondents indicated that they plan to travel to Asia. The next highest choice was travelling within their own country. Africa, Middle-East and East Asia and pacific was the least favored travel destination.

Figure 2.5- Choice of travel destination (in number)

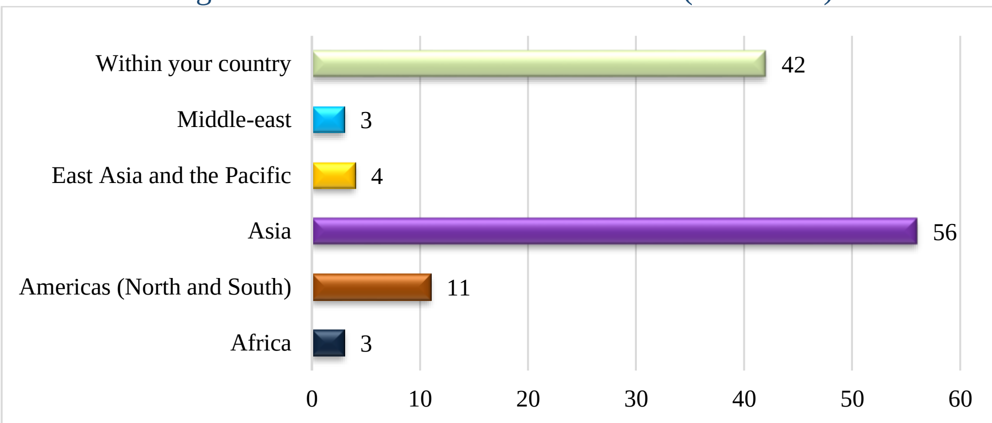
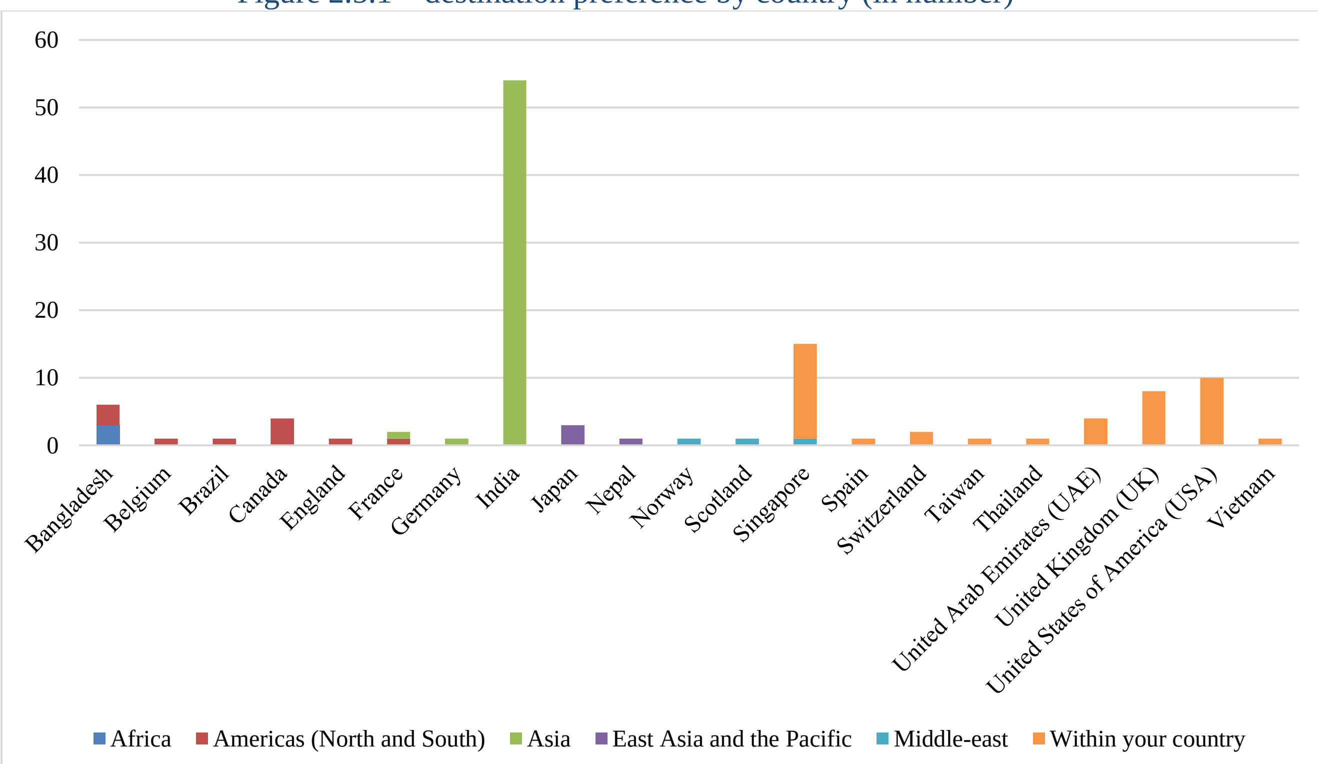


Figure 2.5.1 – destination preference by country (in number)

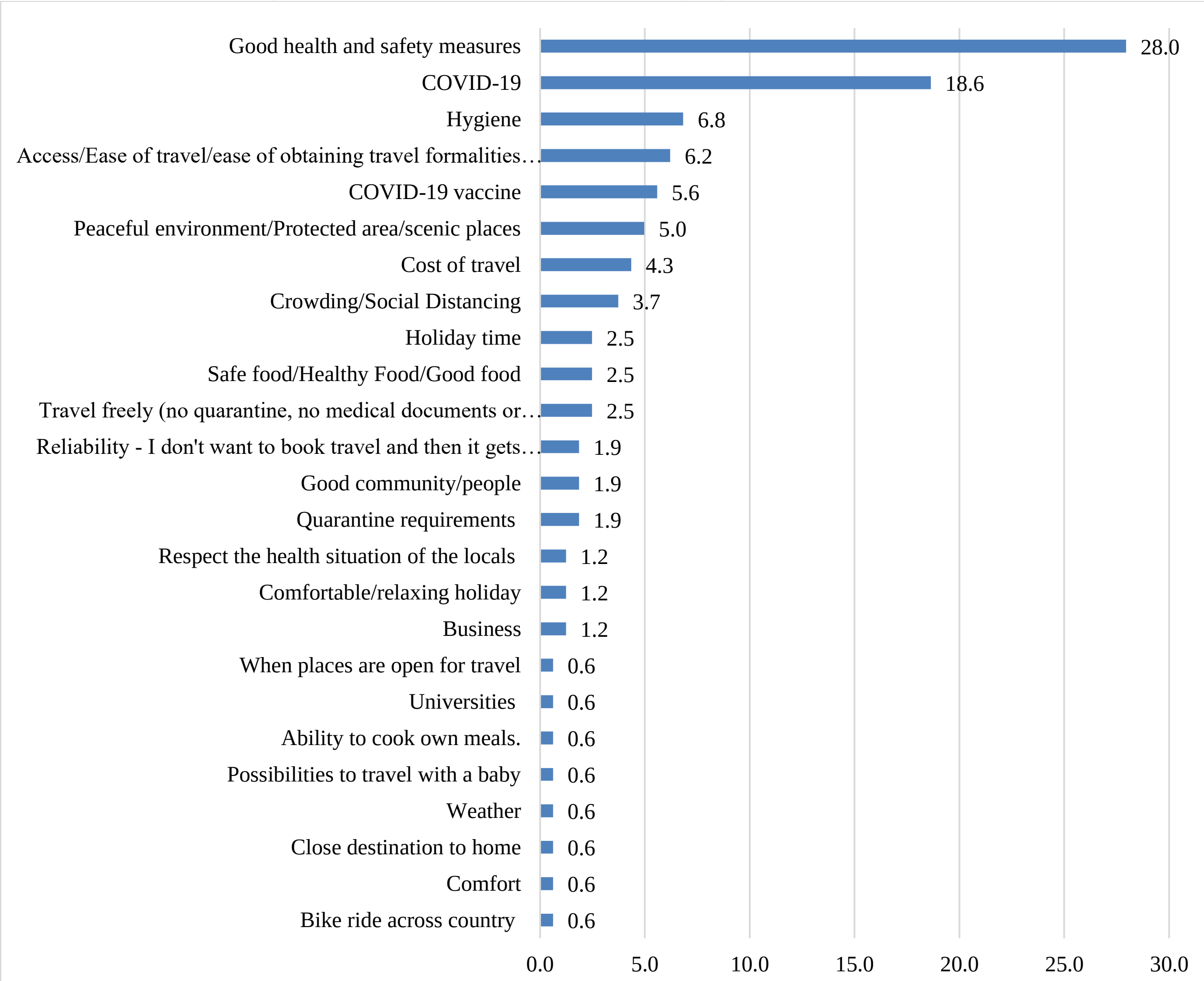


All the respondents from Spain, Switzerland, Taiwan, Thailand, UAE, UK, USA and Vietnam indicated that they are willing to travel within their country. All the respondents from India and Germany indicated their choice of travel as Asia.

2.6 Factors to consider while travelling again

Respondents were asked on their main consideration when they travel and majority of the considerations were related to COVID-19 issues. Other than that, respondents were also looking for peaceful and ease of travel.

Figure 2.6- Main factors for travelling again (in percent)



2.7 Factors impacting choice of next travel destination

The next question was related to considerations while selecting their travel destination. Even here, majority were related to COVID-19 issues. Other issues were also related to ease of booking their travel, accessibility, and affordability among others.

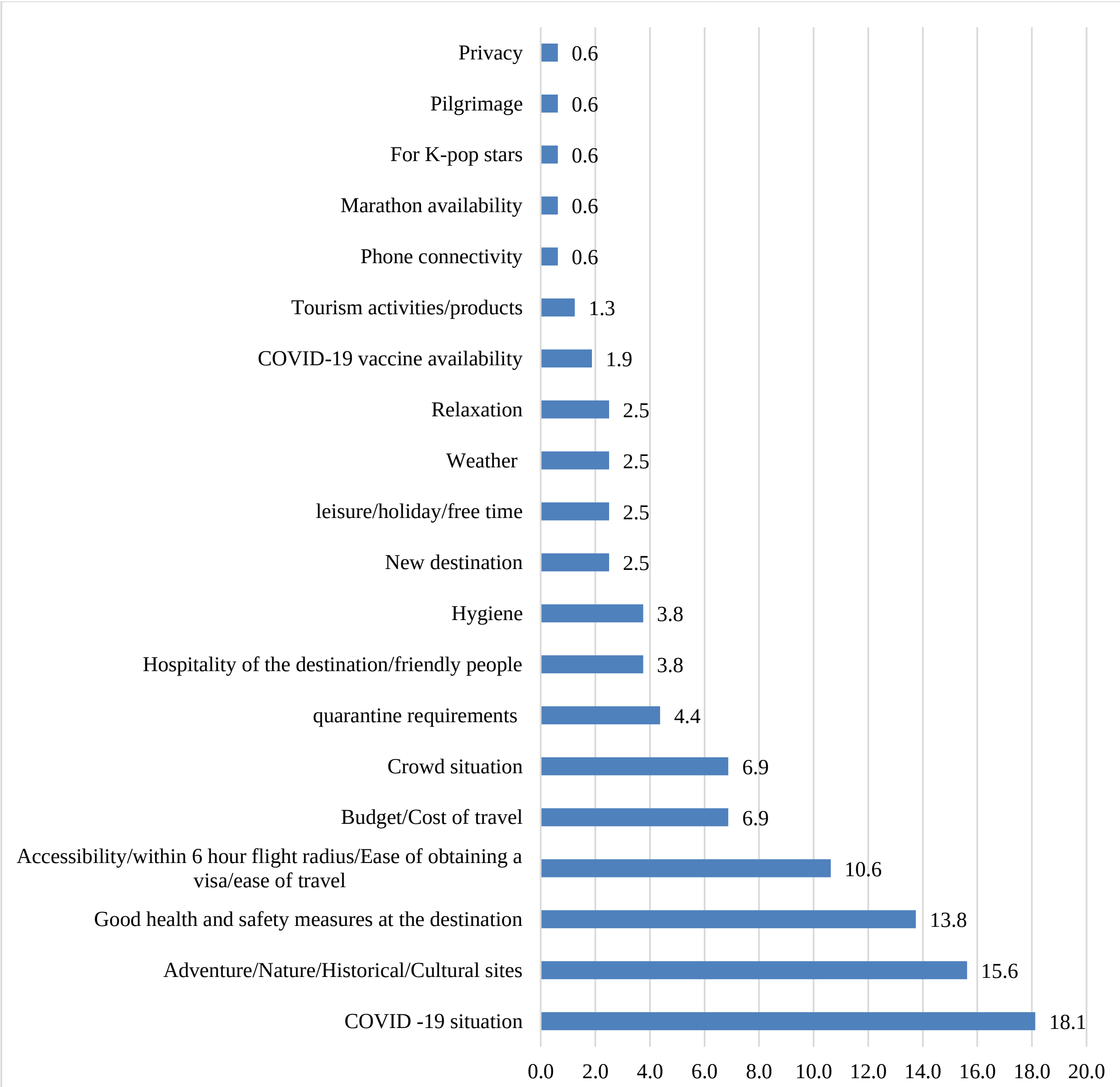


Figure 2.7 – factors that impact the choice of next travel destination (in percent)

2.8 Preferred activities/products

Respondents were also asked on their choice of travel activities or attractions. Here majority were interested nature, adventure, sports, and culture and sightseeing activities.

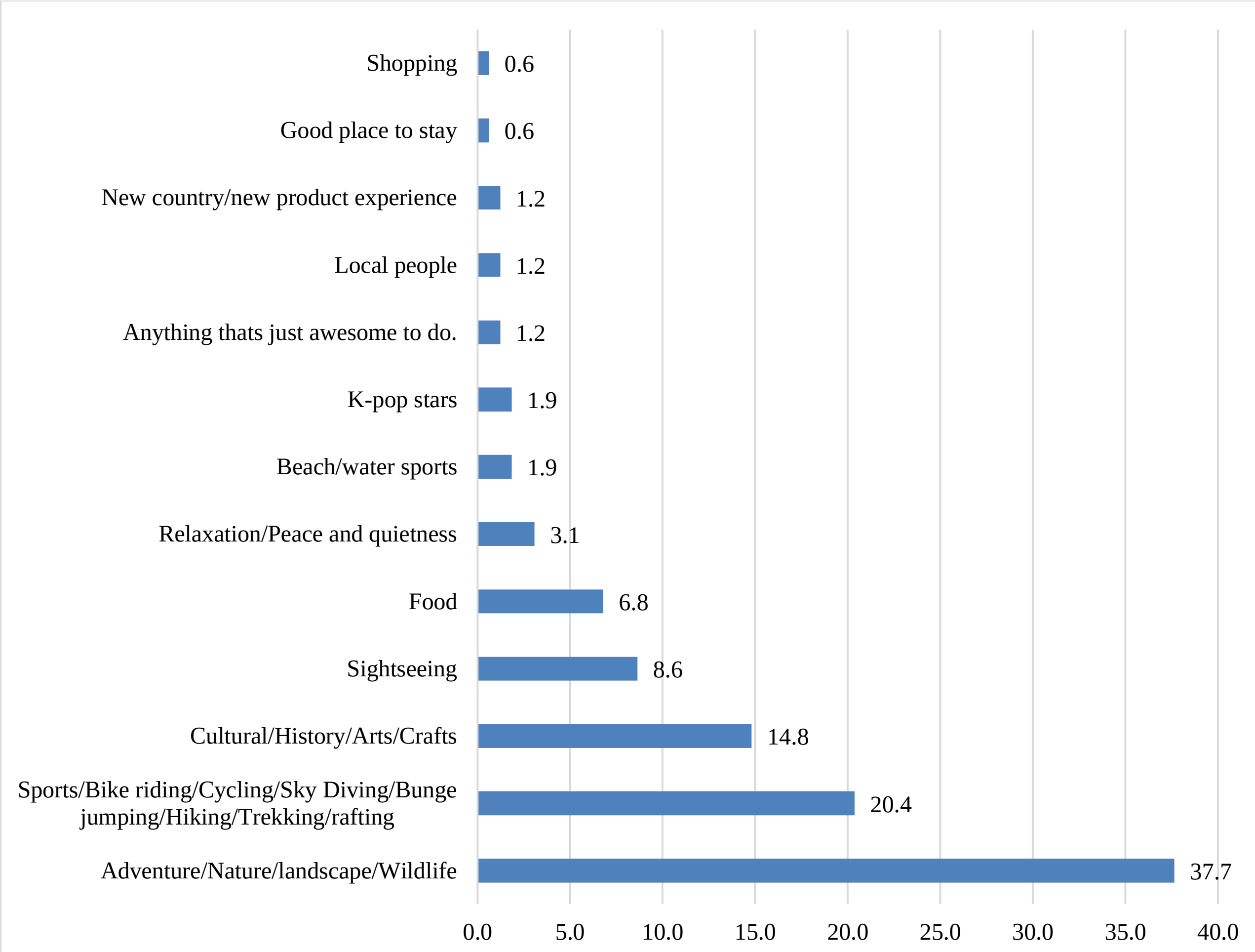


Figure 2.8- visitors' preference of attractions/products (in percent)

2.9 Motivation to travel again

For those who said that they are not decided on their next travel, we asked what would motivate them to travel. Here as well, COVID-19 situation and affordability were mentioned.

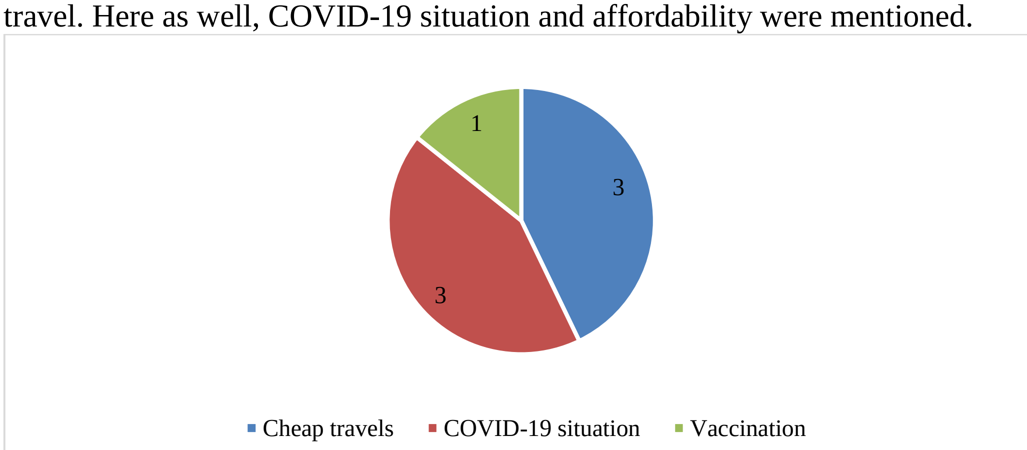


Figure 2.9- Motivation to travel again (in number)

1.10 Impact of cost of travel plans

We wanted to gauge whether cost would be a deciding factor for their next travel and asked the respondents, the importance of cost while deciding their next travel. Majority of the respondents indicated that it is indeed important factor. Only 8.8 % indicated that it is not important. This could also indicate that COVID-19's economic impact on people.

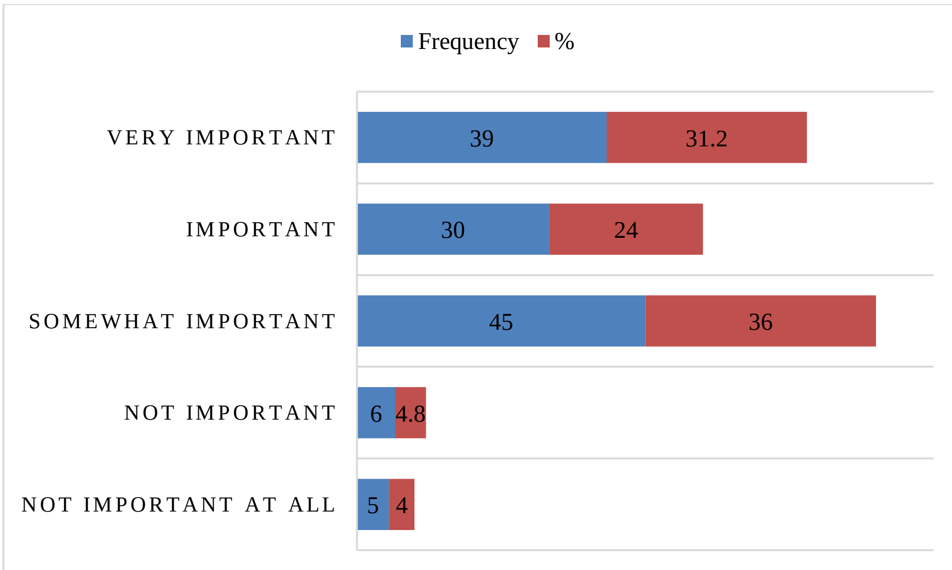


Figure 2.10- Important of cost while travelling

2.11 Expectations regarding COVID-19 safety protocols

This question is related to COVID-19 situation to gather visitors' expectations from the host destinations regarding COVID-19 protocols. Majority indicated protocols related to COVID-19 prevention and treatment as being important.

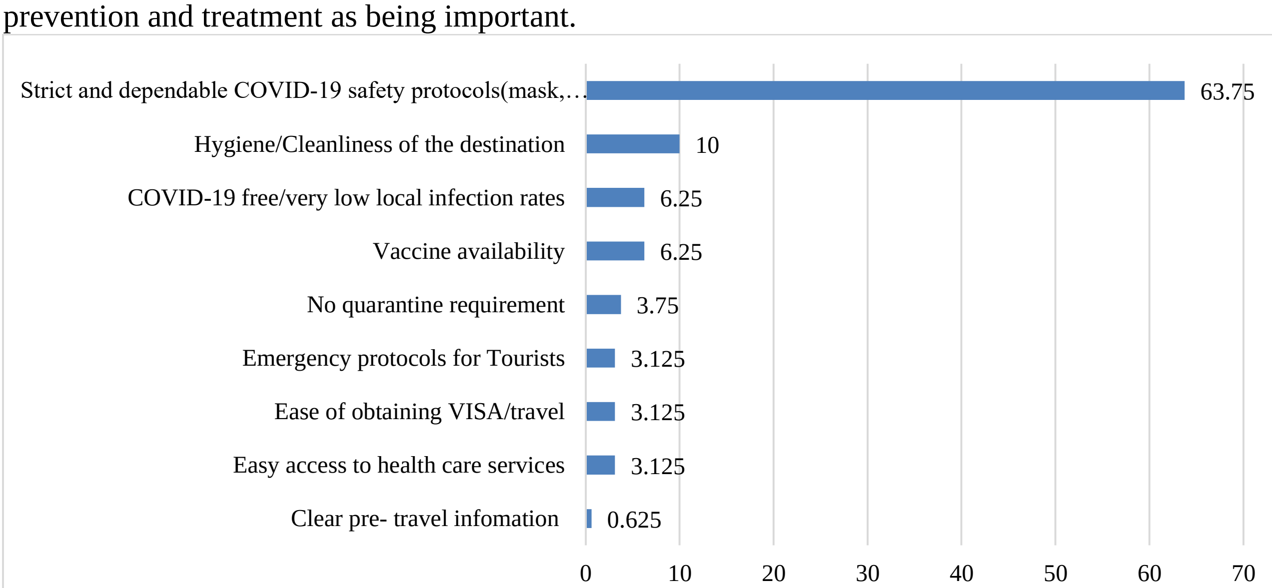


Figure 2.11- Expectations regarding COVID-19 safety protocols from the host destination (in %)

2.12 Travel group size preference

We wanted to find to whether people's preference for travel composition is related to COVID-19. The highest percentage of 67 % indicated that they preferred to travel in small groups, while 22.4 % indicated preference for individual travel. Only 10.4 % indicated that they prefer to travel in groups of more than 4.

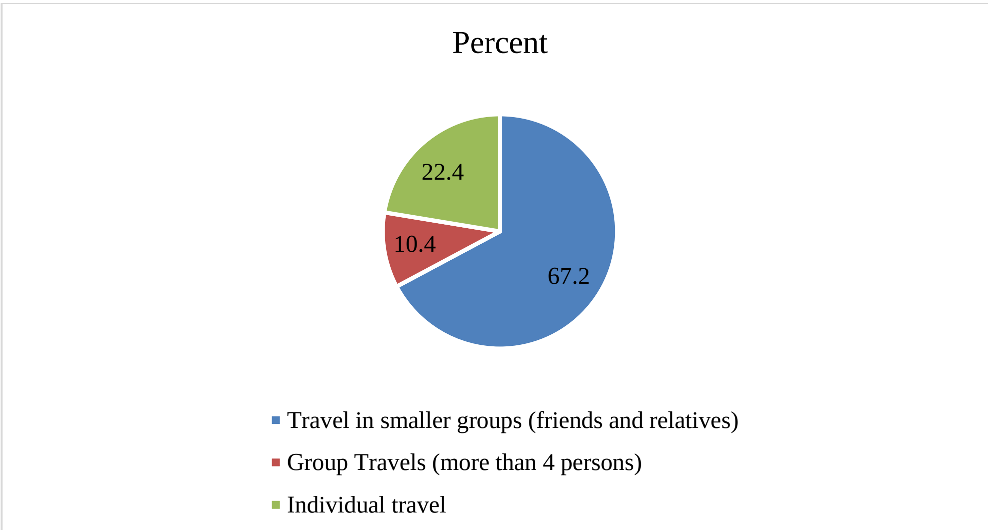


Figure 2.12- Group size preference

2.13 Willingness to travel with COVID-19 negative certificate or Quarantine requirements

We wanted to find would whether potential travelers were in favor of quarantine requirement and COVID-19 negative certificate. This is almost spilt in half, with half the respondents being in favor and the other half did not favor such requirements.

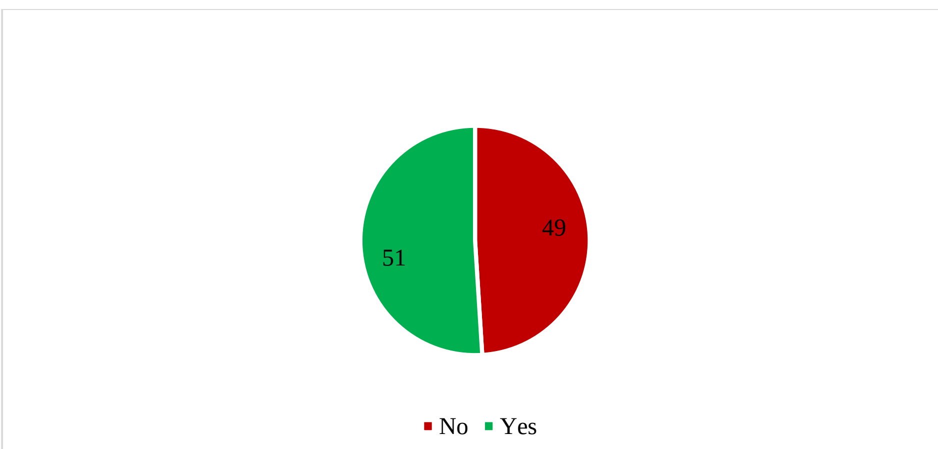


Figure 2.13- willingness to travel with COVID-19 negative certificate or quarantine requirements (%)

2.14 Additional comments regarding post COVID-19 travels

The final question was related to opinions on travel aspirations post COVID-19. Here as well, majority of the issues are related to protocols related to COVID-19 and vaccine availability.

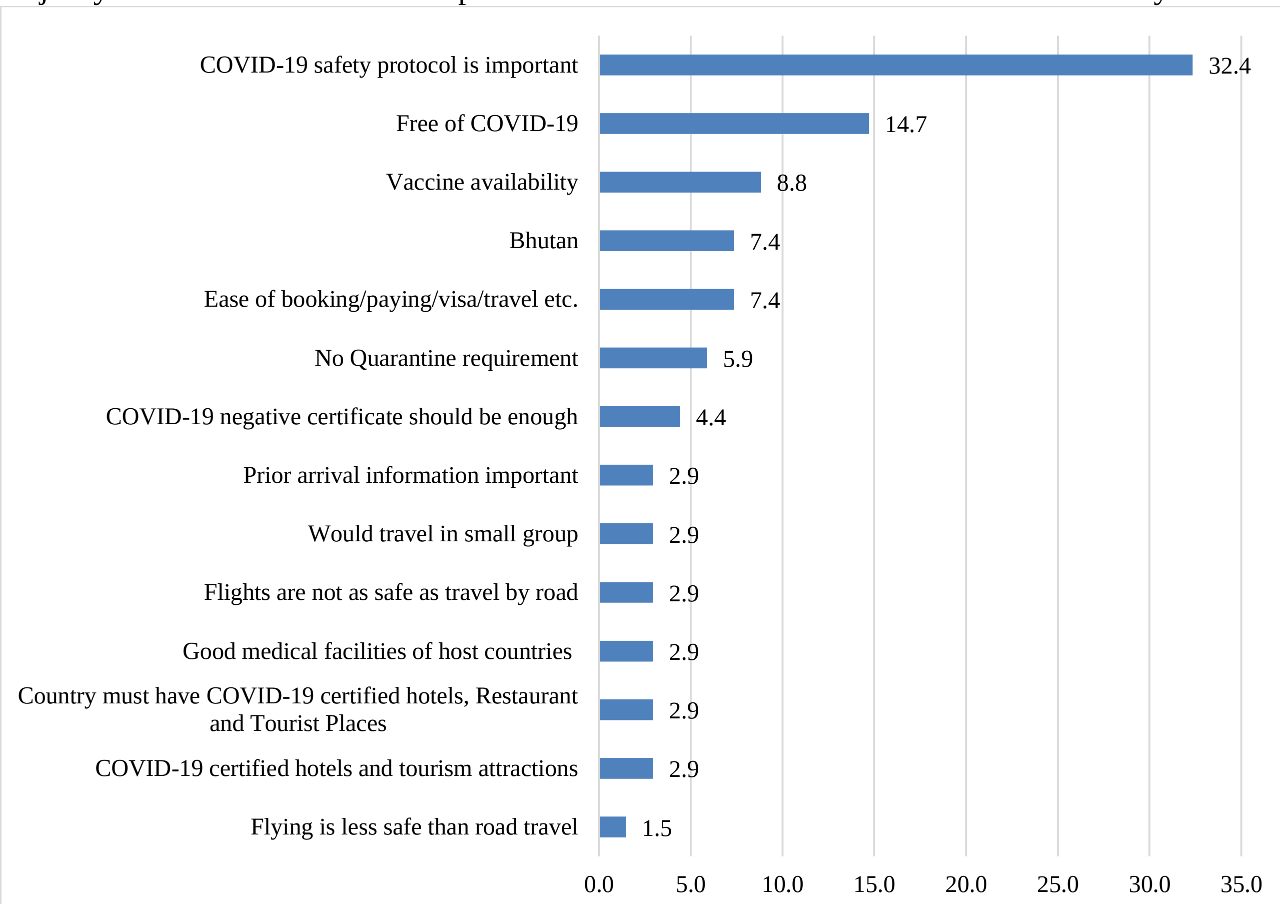


Figure 2.14– Additional comments on travel aspirations post COVID-19 (in %)

3.0 Discussion and conclusion

From the survey responses, it is clear that COVID-19 issues will dominate post COVID-19 travel. While the travel industry might not be able to recover instantly, it is also encouraging to see that almost all the respondents indicating their willingness to travel again. Even more encouraging news, it that majority of them are willing to travel within one-year timeframe.

Another important issue is, visitors' willingness to travel without quarantine requirement and fuss free travel. So it is important to open travel industry only when it is safe to travel without having to go through quarantine requirements. A vaccine and rigid COVID-19 protocols would allay the fears of many tourists.

The news gets better for Bhutan as travelers are indicating their preference to travel in small group while exploring nature and culture based tourism, which Bhutan is famous for. Respondents are also looking for strong and dependable COVID-19 protocol, again, an area which Bhutan excelled in. Since Bhutan has one of the most stringent COVID-19 prevention protocol and very low infection rates, it can use visitors' concerns regarding COVID-19 to its advantage.

Majority of the respondents also indicated Asia as their top choice, indicating potential travel to Bhutan as well. However, majority of those responses are from India, so maybe Bhutan can utilize regional tourist for recovery purposes.

This survey also gives us opportunity for improvement, especially for visitors looking for ease of booking travel by utilizing technology to ease travel booking. TCB has already started digitalization process, the aim should be to make travel booking as easy and convenient as possible. For cost conscious visitors post COVID-19 due to economic impact of COVID-19. A discount system could be instituted for repeat visitors. This would help with tourism recovery while increasing the brand image among repeat visitors. Repeat visitors could be termed as loyal visitors to further encourage them.

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