HOW DID COVID-19 RESHAPE THE TRANSPORTATION PREFERENCES AMONG TOURISTS

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ABSTRACT.
Background. COVID-19 pandemic had and still has a significant impact on the tourism sector. It causes high income drops as well as changes in customers' preferences. These preferences play a crucial role in customers' purchasing behaviour and decision-making process. **Aims.** The main aim of the paper is to analyse the changes in tourists' preferences regarding the booking and/or purchasing of transportation services caused by the COVID-19 pandemic. **Methods and sample.** Data for our analysis were gathered via a questionnaire to detect the tourists' preferences before and during the pandemic. We managed to collect 350 data entries from the period before the pandemic and 350 from after the pandemic had started. **Results**. Data were analysed and the preference shifts were identified, while we highlighted the most important decision factors in both periods. We especially aimed to identify the hypothetical statistical influence of demographic and geographic factors on how people perceive the importance of technology availability. For that analysis, we used a Chi-square independence test and Fischer exact test. **Conclusions and implications**. We have successfully confirmed the significant shift in customer preferences in the transportation area. The key findings are generally more sophisticated and thorough decision making, higher perceived importance of technology availability and new factors presence – e.g., hygienic or security measures.

Keywords: tourism, preferences, purchasing behaviour, transportation, technology

Introduction

Each industrial area serves its own customers, attracts them in a special way and treats them with a specific approach. Tourism is a very fast and unpredictable sector of the industry. Therefore, the businesses operating within the sector must be very cautious when inviting customers to the destination or luring them to purchase a product or service (Rather, 2019). The more important is then the overall ability of such businesses to correctly identify the needs, wishes and preferences of their customers (Cuculeski et al., 2016). All these factors, which need to be taken into account within a creation of a marketing strategy, define, shape and develop customer motivation and their purchasing behaviour (Hudson & Hudson, 2017). There are both positive and negative trends in the sector. One of the most significant negative trends shaping tourism, including transportation services, is a COVID-19 pandemic caused by the virus SARS-CoV-2 (WTTC & Wyman, 2020). A great number of hygienic and security measures to slow down the spreading of the coronavirus were implemented worldwide. In Slovakia, the most significant regulations were e.g., use of safety masks, social distancing, borders closure, regulation of people movement, mandatory quarantine after return from abroad or prohibition of mass events and crowding. (Public Health Authority of the Slovak Republic, 2021) For the transportation area, it had almost devastating impacts as drastic measures were accepted with the aim to stop the spread. International travel was extremely limited, several transportation companies were forced to shut business and those who survived, recorded all-time low financial results.

The main objective of the presented paper is to analyse the change and shift in tourists' preferences regarding the booking and/or purchasing of transportation services caused by the COVID-19 pandemic. We focused primarily on the potential of technology availability as WTTC defined technology as one of the possible solutions for recovering the tourism sector (WTTC & Wyman, 2020).

Theoretical background

Tourists' purchasing behaviour

Purchasing behaviour is generally defined as a group of reasons, why one or more persons (as a group) purchase products or services, which criteria they consider and how they finally make a purchase decision (Swarbrooke & Horner, 1999). When a new millennium was starting, tourists were divided into two categories based on their travel motivation – alocentric (venturers) and psychocentric (dependables). People who were inclined to be more alocentric (when a person is able to perceive the situation from the point of view of other people and is open to a new experience) prefer exotic destinations, contact with locals and spontaneous decisions. Psychocentric people (a person, who avoid new, unknown experience and is more self-oriented), on the other hand, prefer mass trips, organized tours and familiar destinations (Plog, 2002).

As we already suggested, customers differ from industry to industry. These differences are further reflected in their purchasing behaviour. In the tourism sector, customers are impacted and influenced mainly by these seven factors: motivation of purchase, demographic factors, social status, culture, life cycle, reference groups (reviews, recommendations, and experience) and lifestyle (Hudson & Hudson, 2017). This, however, implies mainly individual customers – private persons. The situation is slightly different when the customer is a business or other legal entity. In such a case, one person purchases the tourism product or service, but a different person uses them (Gucik, 2011). Today, when a tourist purchases a product or service, they expect much more than just the core product. They expect the purchase of the whole experience and the story behind it (Hollebeek & Macky, 2019). This mindset of so-called experience marketing is a principle of the intangible experience economy concept (Le et al., 2019; Song et al., 2015). The highest possible quality of the products and services is still crucial. However, an extraordinary experience will stay in customers' minds for a long period and thus influence their follow-up purchasing behaviour, even returning to the destination (Rather, 2019). This summarizes, how important for businesses operating in tourism is to stay aware of what their customers really wish for, and what are their desires and aspirations. If they know the wants of their own customers and they realize which decision factors are the most important for them, only then these organizations can grow, eventually expand internationally, improve the quality of customer service and experience, and strengthen their position in customers' minds (Liao & Chuang, 2019).

Travelling preferences

The purchasing behaviour of customers in tourism is a very complex and sophisticated process. Thus, it is very important to identify and thoroughly evaluate tourists' preferences and the main motivational factors which influence not only the destination choice but the whole process of the planning of travelling activities (Kladou & Mavragani, 2015). Motivation to purchase is often influenced by the individual characteristics of a tourist as well. However, these factors do not impact the behaviour directly, but through forming the travelling preferences (McGuiggan, 1999).

When planning a trip, tourists must take a major decision, which destination(s) to visit and which not to. The result of such a decision-making process is the creation of "the pattern of consumer behaviour" regarding tourism products and services, which is based right on their core preferences (Hsu, 2009). These preferences take a significant part in decision-making and can be based on internal (needs, wishes, demand) and external (surroundings, culture, etc.) motivation (Goodall, 1991).

Throughout the previous decades, many different factors have been influencing tourists' preferences. Since the beginning of the millennium, the internet and websites took a role. A few years later, the rise of social media, travel aggregators and HTORs (e.g. TripAdvisor) became the key element in shaping touristic preferences (Briggs et al., 2007). The importance of web reviews and recommendations was highlighted by many studies and researches (Yoo & Gretzel, 2009; Chung & Buhalis, 2008; O'Connor, 2008). However, at the end of 2019, the COVID-19 pandemic suddenly became a crucial industry-shaping factor.

Preference changes for transportation purchases caused by the COVID-19 pandemic

As the governmental authorities of Slovakia define it, the virus SARS-CoV-2, better known as coronavirus, causes a very infective and dangerous disease – COVID-19 (ÚVZSR, 2020). Based on WHO's decision to announce the emergency status, ÚVZSR accepted several measures to stop the spread of this virus. Over time, the amount and the type of measures have been changing, but regardless, they had had a huge impact on tourism and travelling (ÚVZSR, 2021).

The emergency status and the respective measures had caused a critical decrease in international and also domestic people and goods movement. UNWTO defined a decrease of 73 % in total tourism arrivals, while the expenditures of the tourists dropped by a billion USD (UNWTO, 2021). COVID-19 pandemic significantly influences purchasing patterns and preferences of tourists. Hand in hand with the tourism sector have been also changing the tourists' preferences. Mckinsey and Company studied the impacts of pandemics on tourists' consumer behaviour globally. The majority of 45 researched countries declared an enormous decline in tourists' expenditures, mainly in accommodation and transportation services. A significant change was identified also in travelling preferences regarding the choice of destination, transportation provider and leisure activities in the destination (Mckinsey and Company, 2020). Several studies proved that some brand-new decision-making criteria are taken into consideration when a tourist plans a trip. In addition to the usual criteria, such as price/quality ratio or reviews, tourists start to also consider health risk, security risk or travel restrictions in the destination and service providers in the destination (Pappas & Glyptou, 2021).

Kock points out the specific implications of these preferential changes. The rate of xenophobia and ethnocentrism raised and customers start to search for destinations, which are not tourist-crowded. They also confirmed that customers started to take safety measurements into account, while the influence of all the considered demographic factors was proclaimed negative (Kock, 2020). The study on Czech and Slovak customers supports these findings and adds, that these customers markedly started to prefer domestic travelling connected to sightseeing and staying in nature (Dusek & Sagapova, 2021).

Transportation services providers had to react. Several big businesses had to close (either temporarily or permanently) their business and others had to dramatically reduce the capacity in order to be able to provide their services. The total capacity of airline seats available for customers had been decreased by 37 % (domestic flights) and 76 % (international flights) year-to-date. This, together with other restrictions and people's motivation caused, the total number of flight tickets reservations between March 2020 and March 2021 dropped by an unbelievable 86 % (UNWTO, 2021)

Methodology

The main objective of the paper is to analyse the change in tourists' preferences regarding the booking and/or purchasing of the transportation services caused by the COVID-19 pandemic.

We have used a questionnaire containing Likert-scale questions, where the respondents shall identify, how important a given decision factor is when they book or purchase transportation. The rating has seven points, where 1 (one) means 'very important' and 7 (seven) means 'not at all important'. The first phase of the research was conducted in Q1 of 2020, before the pandemic spreads in Europe and the second phase in Q1 of 2021, when the pandemic's heavy impact was present tourism industry. The aim was to analyse and compare the preferences of Slovak tourists and tourists from the EU and other parts of the world. All the considered factors are shown in Tab. 1.

Table 1. Decision criteria for purchasing transportation services. Source: own research

Pre-pandemic criteria	Pandemic criteria
Transportation costs	Transportation costs
Way of transport	Way of transport
Reviews, recommendations, experience	Reviews, recommendations, experience
Brand of the service provider	Brand of the service provider
Technology availability	Technology availability
Travel agency preference	Travel agency preference
Ecological impact	Ecological impact
	Safety and hygienic measures*

*Note: New factor was added to the analysis in the second phase of the research to reflect the change in preferences.

The questionnaire was created in Google Forms and distributed via social media. The target group were the active travellers and tourists, so we were aiming for the groups and pages dedicated for such users. The structure of the sample is the result of the chosen distribution channels – social media. That is one of the limits of the research, as the majority of the respondents were aged 18 – 34, while other age groups are represented on a significantly smaller scale. Compared to the base population, we have to state that the sample does not reflect this population. Therefore, the research results should not be generalized to the whole population. However, due to its size and international character, it can provide an insight into the preferences of tourists worldwide. We managed to collect 350 responses in both phases consisting of respondents from Slovakia, other EU countries, the Americas, APAC, and Africa. In the first phase, we collected answers from 188 Slovak respondents, 136 respondents from other EU countries and 26 respondents from other world regions. In the second phase, 200 respondents were from Slovakia, 96 from other EU countries and 54 from the rest of the world. To identify the preferences, we have used simple descriptive statistics using MS Excel Pivot Tables to calculate means, medians, modus, and counts. To identify, whether selected demographical and geographical factors have a significant influence on tourists' preferences, we have used Pearson Chi-Square, if data counts allow or Fischer Exact testing otherwise. We worked within an IBM SPSS Statistics software interface.

Table 2. Sample profile. Source: own research

Pre-pandemic sample	Pandemic sample
350 respondents (188 from Slovakia, 162 foreign respondents)	350 respondents (200 from Slovakia, 150 foreign respondents)
88% were aged 18-34	74% were aged 18-34
74% female & 26% male respondents	59% female & 41% male respondents

Based on the mentioned studies and our previous research we have developed three research questions:

Q1: How has the perception of the importance of the chosen decision factors when purchasing transportation changed due to the COVID-19 pandemic?

Q2: Is the importance of the availability of modern technology perceived differently by men and women?

Q3: Do people from different world regions and from different generations perceive the importance of smart technology in the transportation selection process differently?

Results

Transportation services – preferences before the pandemic

When travelling to the destination, tourists have a broad range to choose the way of transport – they can use their means of transport, they can get an advantage of community solutions such as car rental or carsharing when more people share one ride to the destination. For shorter distances, there is usually a possibility to use public transport or to walk, if it is one's option. For longer distances, tourists can use specialised transportation services providers operating within road, air, rail or sea transport. And that is the area of our study, as we have been researching, what criteria are most important when choosing a transport provider.

Pre-pandemic preferences

We have identified 7 decision criteria for choosing a transport provider based on previous research and data availability (see Table 1). Respondent should have assigned a value from 1-7 based on the criteria importance, while 1 stood for 'very important' and 7 for 'not at all important'. Results, sorted by average, median and modus are shown in Table 2.

Table 3. Scores of decision criteria for choosing a provider of transportation services (pre-pandemic). Source: own research

Criteria	Average	Median	Modus	Count of Extreme values "1"	Count of Extreme values "7"
Transportation costs	1.95	1	1	192	20
Way of transport	2.90	2	2	73	11
Reviews, recommendations, experience	2.97	3	3	37	1
Brand of the service provider	4.52	4	4	6	39
Technology availability	5.14	6	7	23	99
Travel agency preference	5.25	5	6	16	109
Ecological impact	5.27	6	7	3	71

Before the pandemic spread out in Europe, the most important decision criteria were price or transportation costs, a preference for a specific way of transport and reviews, recommendations and own experience. Other criteria were considered much less important. Transportation costs were 'very important' criteria for almost 55 % of respondents. Medians and Moduses follow the rank of means/averages.

Comparison of respondents' preferences from Slovakia and worldwide

Transportation costs were the most important decision criterium regardless the country of the respondent. However, the least important criteria differed significantly. While for Slovak respondents, the lowest score was recorded by 'Ecological impact' option, for non-Slovak respondents the least important criterium before the pandemic was 'Travel agency preference'. After running several Chi Square tests we managed to statistically confirm the significant influence of the place of life to the criteria importance in all criteria but the one already mentioned – 'Travel agency preference' – which was not really important criterium for Slovaks nor for international respondents.

Despite the criteria preference for choosing a transportation provider, we also studied what are the preferences when tourists purchase flights or other travel tickets. More than 46 % of the respondents prefer to purchase flight tickets directly via the website of the airline, 17,43 % prefer the aggregator websites. Mobile apps are not generally popular, as 13 % prefer the app of the airline and only 1,71 % the app of the aggregator. The analogical situation is by purchasing other travel tickets, when half of the respondents (175) prefer the purchase via the provider's website. However, more than 27 % of respondents prefer the mobile app of the provider, and 16 % stated that they prefer to buy travel tickets directly and personally, either on a kiosk or by a driver. Most respondents (68,57 %) prefer to pay for the tickets by card, while only 5,43 % prefer mobile solutions such as Apple Pay, Google Pay or PayPal.

Post-pandemic preferences

COVID-19 pandemic has had a huge impact on all the businesses operating in the tourism sector, including the transportation companies. The perfect reflection of this statement is the situation in Poland, where the total amount of people transported dropped by more than 61 % (Sas, 2021). We can confirm this statement by our own research as well, because 76 % of respondents confirmed, that they noticed and felt the consequences of the reduction of transport lines either domestically or internationally. However, people transportation, although at a lower rate, was still ongoing so we studied whether the COVID-19 factor has an influence on people's touristic preferences when choosing a transport. The same approach was applied to rank the preferences as in a 'pre-pandemic era' with one difference – we had added one extra criterium – safety and hygienic measures. The results are shown in Table 3.

Table 4. Scores of decision criteria for choosing a provider of transportation services (post-pandemic). Source: own research

Criteria	Average	Median	Modus	Count of Extreme values "1"	Count of Extreme values "7"
Transportation costs	1.98	2	1	158	2
Safety and hygienic measures	2.27	2	2	110	5
Technology availability	2.44	2	1	121	12
Way of transport	2.63	2	2	86	11
Ecological impact	2.78	2	1	122	10
Brand of the service provider	3.10	3	2	71	29
Reviews, recommendations, experience	3.27	2	2	74	62
Travel agency preference	4.15	4	7	48	104

The most important decision factor before the pandemic was transportation costs. The same result was identified in the post-pandemic research, but the second most important criterion is the newly added factor – safety and hygienic measures. However, respondents assigned similar importance to 6 of the 8 factors, as the ones between 2nd and 7th place are just within a 1-point range. Generally speaking, the importance of all criteria has risen. Especially the perceived importance of technology availability and ecological impact. For full structure, see Figure 2.
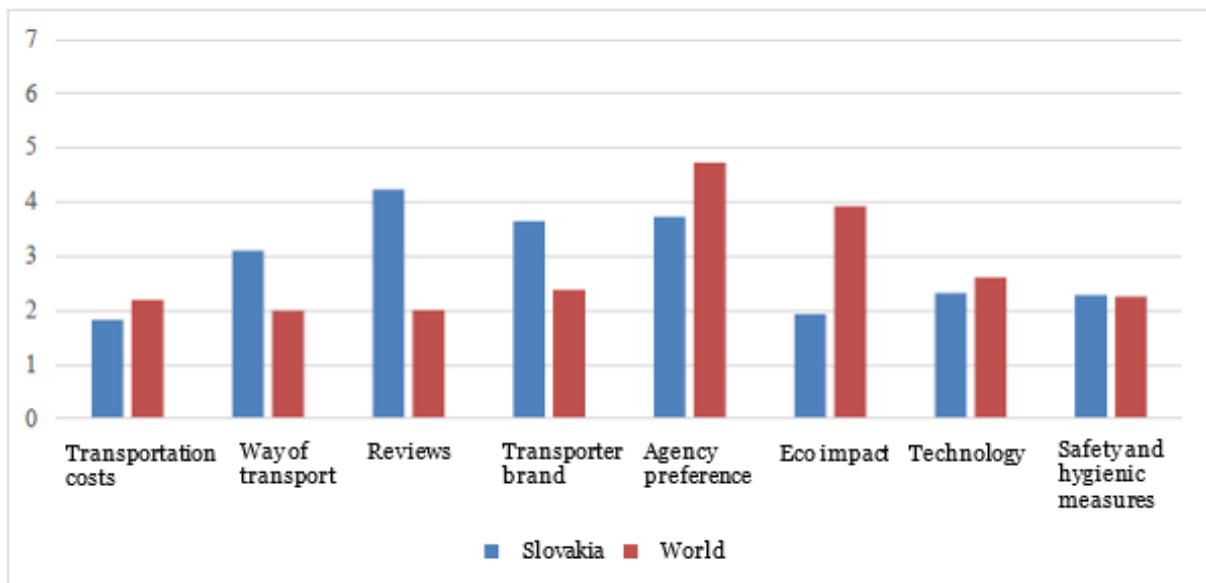

Figure 1. Comparison of Slovak and non-Slovak preferences of decision criteria, scale 1 (most important) – 7 (least important). Source: own research

Comparison of respondents' preferences from Slovakia and worldwide

Several interesting outcomes were identified when comparing Slovak and non-Slovak data entries. Although both groups of respondents identified Transportation costs as the most crucial decision criteria in both parts of the research, the interesting fact is the shift of preferences of Slovaks. More than 3,5 points (at a 7-point scale) growth was identified by the criteria Ecological impact, which may suggest the realisation of the environmental state of the world during the pandemic and afterwards. Surprisingly, the least important decision factor was reviews, recommendations and own experience, which was considered as very important criteria before the pandemic in both study groups. Non-Slovak respondents considered the Way of transport as the most important factor. The significance of the differences can be seen in Fig. 1.

In addition, we have identified that travel aggregators remained the top source of booking travel tickets with a 48 % preference lead. However, after the pandemic ends, people should use websites and mobile apps for purchasing tickets much less, as in our study this source's preference dropped by 26 %. Respondents also confirmed that after the pandemic, they plan to use the standard car rentals less (43,14 % of respondents, compared to 56,5 % before the pandemic), while the rental through the sharing economy tools, such as carsharing, will be more popular (48,57 %, compared to 29,43 % before the pandemic). We can state that during the pandemic, the interest of the people in sharing economy rose regardless of the nationality of the tourists.

Preferences regarding technology

Technology plays an important role in transportation. The options of their application are quite numerous – either for reservation systems, different forms of the tickets or of their payments. Often transportation providers use technology tools to improve the comfort of the customers or to bring them all the necessary updates in real time. Vehicles are often equipped with entertaining portals, online movies or books libraries, music-listening software or WiFi, which is already a standard.

However, our research showed that before the pandemic technology availability was not an important decision criterion for choosing transportation. With several Chí Square tests, we proved that the difference in this importance perception is significant by place of life, income and household size. An interesting fact is that not a single respondent from the APAC region assigned any importance to technology availability, while 6,2 % of Slovaks and 19 % of Europeans did. Technology was perceived as important by people with higher income (1 401 € and more) and by households not too small nor too big (3-4 persons). The most important is the technology for people living in the household alone – 27,3 % of them. The influence of age was not significant.

Table 5. Chi Square test – influence of demographic factors on technology importance perception; p-values of Chi Square (or Fischer Exact test). Before the pandemic. Source: own research

Chi Square test	p-values (compared to 0,05)				
Technology importance – before pandemic	Age	Gender	Region	Income	Household
Transportation	0.833 (0.859)	0.055	0.000 (0.000)	0.001	0.001

We have already proved the significance of pandemic influence on the perception of decision criteria when purchasing transportation. The influence was obvious by criterium "technology availability" as well. So how has this perception changed because of pandemics?

Again, we ran several Chi Square tests (or Fischer tests, if Chi Square is not applicable; results in brackets) to identify the influence of selected demographical factors on this perception. However, in this case, we proved that no studied factor had a significant influence. Therefore, we can say that pandemic eliminated any influence of these factors on the perception of how important the technology is.

Table 6. Chi Square test – influence of demographic factors on technology importance perception; p-values of Chi Square (or Fischer Exact test). During the pandemic. Source: own research

Chi Square test	p-values (compared to 0,05)			
Technology importance – during pandemic	Age	Gender	Region	Household
Transportation	0.985	0.447	0.806 (0.765)	0.166

However, our research showed that before the pandemic technology availability was not an important decision criterion for choosing transportation. With several Chí Square tests, we proved that the difference in this importance perception is significant by place of life, income and household size. An interesting fact is that not a single respondent from the APAC region assigned any importance to technology availability, while 6,2 % of Slovaks and 19 % of Europeans did. Technology was perceived as important by people with higher income (1 401 € and more) and by households not too small nor too big (3-4 persons). The most important are the technology for people living in the household alone – 27,3 % of them. The influence of age was not significant.

Conclusion

Our findings consist of several interesting parts. The first one is, that the COVID-19 pandemic really impacted the tourists' preferences when booking or purchasing transportation services. Although the price as the factor was still perceived as very important, also new factors popped up and became important decision criteria. The next interesting finding is the fact, that modern or smart technology was perceived very poorly as a decision factor before the pandemic. Although their importance has risen, they still don't belong among the most important factor. However, we identified that several factors influenced the perception of the importance of technology in the transportation choice process. To answer our research questions, we must look at the results of the study.

How has the perception of the importance of the chosen decision factors when purchasing transportation changed due to the COVID-19 pandemic?
We can clearly state that this change was quite significant. As can be seen on the factors rank in Tables 2 and 3, the new criteria related to the COVID pandemic have become the crucial decision factors, compared to the factors COVID non-related.

Is the importance of the availability of modern technology perceived differently by men and women?
The gender role and the influence on technology's importance were not statistically proven. Although in the first phase, before the pandemic, the Chi Square independence test was quite strong (0,055), on 95 % confidence interval we had to accept a negative result. During the pandemic, the difference of the perception of modern technology's availability importance between women and men was statistically disproved.

Do people from different world regions and from different generations perceive the importance of smart technology in transportation selection process differently?
Against the non-statistical assumptions, we have not proved the influence of age on the technology importance perception neither before the pandemic nor during it. However, the region was proved a significant factor before the pandemic, but with the pandemic present, the influence was not recorded. An interesting fact is, that before the pandemic, APAC inhabitants had the highest score and Slovaks did not perceive technology importance much. However, during the pandemics, the perceived importance was much higher in the case of Slovak respondents, which makes the differences statistically insignificant.

Discussion

This paper can act as a base, which could be later, after the pandemic ends, compared with another study to research the change in tourists' long-term preferences caused by the pandemic. It also brings an actual insight into the literature available on the topic. The main theoretical contribution is

represented by the current data from pre- and post-pandemic state of the tourism industry joined by the bibliographical inclusion of tourists' preferences and purchasing behaviour. This paper and research could be a base of a broader study, which, in case they'd be interested, could be conceived by the Ministry of Transport and Construction of the Slovak Republic to help Slovak tourism rebound after a very long COVID period.

However, this research has several limitations. The most significant one is its sample, which consists only of 350 respondents, while the structure of the sample is not equal (more females, more younger respondents etc.). This could lower the validity of the general interpretation of the results as the population is defined as quite broad and thus is very numerous. Another limitation can be the pandemic itself because in some countries the virus was already spreading when we were collecting 1st phase data. We lacked deeper and broader data from the Slovak market – theoretical and practical. Even after contacting the Ministry of Transport and Construction of the Slovak Republic we were not successful in gathering any data, as the Ministry confirmed that all tourism-related activities and their measurement were stopped with the pandemic. This research is though meant to be further elaborated.

We aimed to better understand tourists' purchasing behaviour and their preferences, especially when booking or purchasing transportation services. Purchasing behaviour and preferences differ from customer to customer, from country to country and from industry to industry. In this paper, we have proved, that customers in the tourism industry are a great example. We have identified the main differences in tourists' preferences before and during the pandemic. As a result, the price was a very important factor in both periods, however, all the factors were perceived much more positively after the pandemic regardless of any demographical factors. There also appeared new factors which consider the current pandemic situation and their importance was perceived very strongly regardless of these factors, too. The pandemic also deleted the differences between people's preferences regarding the importance of modern technology – as before the pandemic, some factors' (region, income and household size) influence on preferences was proven significant, after the pandemic, the influence was significant in no demographical nor geographical factors. This opens an opportunity for the technology to help recover the industry after this unfortunate period. And businesses which will understand the customers better and which can identify their preferences can survive this situation and if successful, even profit from it.

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