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Changes in tourist decisions in the shadow of the global crisis – how travel preferences and consumer priorities evolved during COVID-19 and beyond

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THE AIM OF THE PAPER
The aim of the research is to gain a comprehensive picture of the changes in the travel habits of Hungarians in the post-pandemic period. The study sought to answer how the supply side should respond to the economic crisis and what new trends and patterns can be detected in consumer behavior, especially in terms of destination choice, motivations, and sustainability.

METHODOLOGY
A questionnaire-based survey was conducted online. The sampling method was a convenience sample, aiming to select respondents from the widest possible range of the Hungarian population. Among the 672 respondents, all age groups were represented, while the proportion of respondents who live in Budapest and have secondary or higher education was relatively high. In addition to statistical indicators, the analysis revealed multivariate correlations, showing characteristic features of consumer behavior in each age group segment.

MOST IMPORTANT RESULTS
Hungarians drastically reduced their leisure travel in 2020 due to forced closures, travel restrictions, and fears (Behringer *et al.* 2022). This cautious behavior and new trends (e.g. preference for domestic travel, traveling less frequently) remained even in 2021. The new motivations, such as “escape from quarantine”, mental recharging, and interest in outdoor activities also persisted, but health security lost its importance. As economic difficulties increased, the focus shifted to considerations of savings and individual financial circumstances.

RECOMMENDATIONS
The pandemic has created a new era in the travel market, for both consumers and service providers. The new trends require strong adaptability, flexibility, and responsiveness on the supply side from individual service providers. Supply side operators will have to adapt to new consumer needs if they want to meet tourists’ expectations and retain customers.

Keywords: tourism, travel preferences, consumer behavior, post-pandemic, economic recession

INTRODUCTION

Before the pandemic, the tourism industry was one of the fastest-growing industries both internationally and domestically. In 2019 its aggregate output was close to 10% of world GDP, it was one of the most labor-intensive industries in the world providing 334 million jobs worldwide. That year recorded 1.5 billion tourist arrivals and 1.9 trillion dollars in revenue (UNWTO 2020). Tourism in Hungary was similarly outstanding with around 400,000 employees, contributing indirectly to GDP production by almost 11%, and contributing 12.8 million tourists, who spent 31.3 million overnight stays and generated nearly 2971 billion forints in revenue for the country. This contributed significantly to improving the external trade balance and the balance of payments (KSH 2020). However, as the pandemic broke out in 2020, it shook the whole industry to its foundations and revealed its extreme sensitivity and vulnerability. Travel restrictions, total closures and fear of the pandemic, all forced market players at both macro and micro levels to fundamentally change their previously taken-for-granted behavior in all areas of tourism in response to the new circumstances and to the new conditions that have emerged.

With the unknown situation worsening, the population was unable to travel due to the total closures and travel restrictions. Nonetheless, the first relaxation and lifting of restrictions made it clear that the population could and would not give up their leisure travel as it had become a necessity. The first cautious tourist trips, full of compromises and in compliance with the epidemiological rules, were immediately launched. Several research studies and surveys have shown that while consumers were very reluctant to restrict their movements (Behringer *et al.* 2022, Törőcsik - Csapó 2021) they would rather travel with compromises, than not at all.

The empirical research measured the change in consumer behavior from pre-pandemic days to the present day since the COVID-19 outbreak is not the only situation that affects current travel plans. The Russian-Ukrainian war caused another shock to the already recovering tourism sector. The global economic crisis caused by the war hit hard everyday lives hard with the explosion in energy prices, inflation and overall cost of living. These circumstances also posed serious dilemmas for consumers, resulting in a new change in travel habits, which were primarily determined by the need to save money.

The objective of the research was to explore the changes in consumer behavior by collecting data on consumer priorities and attitudes from the pre-pandemic era to the present day.

THEORETICAL BACKGROUND

The emergence of the COVID-19 pandemic in 2020 caused the temporary closure of tourist services worldwide (Gössling *et al.* 2021). The increasingly worsening situation and global travel restrictions forced tourists to change travel plans and even cancel their trips (Neuburger & Egger 2021). Hungary was also negatively affected with inbound tourism dropping from 61 million to 31 million within the first year of the pandemic (KSH 2021). The COVID-19 epidemic has also had a huge socio-cultural, psychological, economic, and political impact on the world's population, including various tourism stakeholders. It has had a major effect on both the tourism services and the consumers' travel habits.

The various waves of the virus outbreak and the subsequent travel restrictions have changed tourists' preferences and attitudes when using tourism services. A new interest surged for local destinations close to nature, smart solutions, and strict hygiene protocols (Casado-Adanda *et al.* 2021), as well as automatization and trust in the service providers (Soós - Várhelyi 2021). In the face of restrictions, people preferred to go to villages and cities surrounded by high mountains and forests because of the benefits of being close to nature (Falk *et al.* 2022). Accessibility and price also played a role in destination choice (Sinha & Nair 2021). Consumer awareness has grown significantly, which makes education on sustainability for tourism stakeholders a more pressing need (Németh 2022). Consequently, slow cities and the slow tourism movement and philosophy might be the path to success for destination management organizations (Piskóti *et al.* 2023) in the emerging wave of environmentally conscious tourists.

While the economic impacts of the restrictions were substantial, they also had a major influence on the worsening conditions of mental health. Vacations and travel for leisure activities have a positive effect on the human psyche, and depriving people of these activities can cause great harm (Moreno *et al.* 2020). The COVID-19 pandemic showed that physical activity helps to reduce stress and depression, which made sport tourism and recreation a powerful motivator during the closures (Kiss *et al.* 2021).

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Tourism is a fragile but resilient industry that needs the ability to react flexibly and create scenarios to deal with crises to survive (Gonda 2022). According to the World Travel & Tourism Council (2019), the effects of a crisis caused by a disease outbreak can be felt for more than 19 months on average in the tourism industry. To help the sector to grow, researchers have suggested that tourism operators and destinations should restore their image, make greater use of social media, strengthen the physical and health security of their visitors, and, finally, reorganize the tourism system, along with the creation of new values (Ketter 2022, Palkovics 2022). It is also a necessary action from service providers to relieve the biggest fears of tourists, by offering in-depth information and kind, respectful service (Kökény - Kenesei 2022).

As Csapó and Törőcsik predicted in their study in 2020, as soon as the restrictions lessened, people started to travel again, compensating for what they had previously missed. They also predicted that sustainability would not be the main priority for either the service providers or the travelers.

After a strong recovery in 2022, it was forecast that tourist arrivals in 2023 could approach pre-pandemic levels in Europe and the Middle East (UNWTO 2023), but travel is expected to be different from what has been the case so far. The importance of value for money will increase and tourists will increasingly visit destinations outside the high season (Zaino 2022). At the same time, it is important to note that the war between Russia and Ukraine has significantly affected consumer confidence and the economic crisis that has resulted threatens the survival of tourism-related jobs and businesses and the existence of consumer demand (UNWTO 2022).

With the subsidence of the pandemic, a new international crisis emerged. It is no longer about health security concerns causing significant changes in tourism behavior, but rather the economic crisis. While the post-restrictions era decreased the importance of health safety, tourism is based on trust and security, and to encourage tourism the supply side needs to prioritize it (Csapó - Törőcsik 2019). Different types of crises (financial and economic crises, terrorism, epidemics, natural disasters) have different effects on consumer behavior (Végi & Csapó 2023), so the impact of the new global economic crisis will show the emergence of another kind of tourism trend.

METHODOLOGY

The used methodology employed was an online quantitative questionnaire survey among the Hungarian population. The survey was mainly shared among the university students and their parents and friends. The authors used convenience sampling. While not representative, the sample size gives an opportunity to draw more general conclusions about specific groups of the population. 672 people completed the questionnaire, which consisted of mainly of closed questions. It contained four sections: the respondents' leisure travel habits in 2021 and 2022; their travel plans for 2023, as well as the demographics. The empirical research was conducted in the late autumn of 2022, when a significant proportion of annual trips had already taken place and the responses of those who planned to travel in the remaining period of 2022 (4%) were also considered. In addition, they were asked about their travel plans in 2023. The demographic questions allowed the researchers to specify their analysis and explore multivariate, deeper correlations. In total, 74 professional questions and 6 socio-demographic questions were asked and from the demographic composition of the 672 respondents, it can be concluded that the sample is heterogeneous enough to allow analysis of the travel behavior of different segments and to draw general conclusions about the consumer behavior of these population groups.

RESULTS

Demographic profiles of respondents

After cleaning the sample, 670 respondents remained. The majority of them were women (73%, 489). Most of the respondents came from the capital and Pest County, with a larger number of respondents from larger cities in Northern Hungary and Central and Western Transdanubia counties. In terms of age groups, 18-25 years olds accounted for 39% with 259 respondents, followed by 46-60 years olds with 150 respondents (22%). The next category was the 36-45 age group with 110 people (16%), followed by the 26-35 age group with 94 people (14%). The sample also included people under 18 years of age (5%) and people over 60 years of age (4%). In terms of their occupation, a significant proportion of the sample was made up of employees, office workers and academic professions (33. 6%, 10.9%, and 24% respectively), but there was also a noticeable presence of respondents representing other occupational fields (entrepreneurs, managers,

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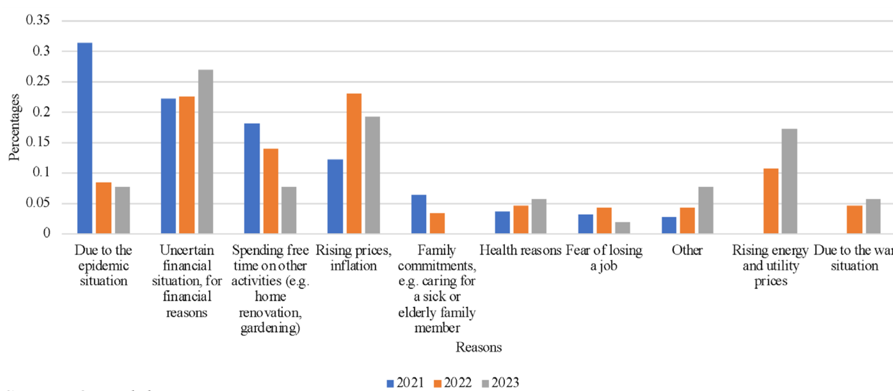
manual workers and retired people, ?%). In terms of educational attainment, university/college graduates (40%) and high school graduates (33%) dominated, but there were also primary school graduates and those with a doctorate or other higher education qualifications (?%). In terms of marital status, there are broadly similar proportions of people living as a couple or married with children and those living as a couple or married without children (27% and 23% respectively). In addition, a significant proportion of respondents were living with their parents (30%) and the lowest proportions of people were living alone without children and with children (15% and 5% respectively).

Evaluation of the research questions

In the first part of the survey, respondents were asked about general travel patterns for both years (with details of actual trips in 2021 and 2022), asking about the frequency, seasonality, direction, destination choice, and directions of travel – separately for foreign and domestic destinations. They were also asked in detail about the organization of trips, the means of transport chosen, accommodation, traveling companions, the amount spent, the level of satisfaction with the trip, the timing of bookings, and the development and changes in motivations. They were asked separately about their travel plans for 2023, with less detail than for trips already taken, as it was not considered realistic to ask for details precisely because of the uncertain and unpredictable future situation.

Based on the results, the following conclusions can be drawn about overall travel behavior. During the examined period (both in 2021 and 2022), a significant proportion of the respondents did not travel at all (between 20-25%). The respondents gave the following reasons for not traveling, as shown in Figure 1. In 2021, the most common reason for not traveling was the pandemic situation (30%), but a significant proportion of consumers were also deterred from traveling because of the individual's precarious financial situation (25%), spending their free time with other activities (18%) and the rising price level (13%). In 2022, and even more markedly for the 2023 plans, the economic uncertainty of the individual and the external macro environment, the financial situation of the individual, the rising energy prices and inflation acted as a deterrent (22-23-10%), and the category of spending leisure time with others will remain significant in 2022 (12%).

Figure 1. Reasons for not traveling by year (N=670)



Source: Own elaboration

The results for the travel plans for 2023 are mixed. 15% of respondents did not know at the end of 2022 whether they would travel in 2023. However, those who did plan to travel in 2023 were quite bold, indicating not only domestic and other nearby European destinations but also destinations outside of the European continent. As the epidemic situation improved in 2021 and 2022, consumers became more adventurous and started to visit destinations closer to home, then further abroad, and destinations previously unknown to them and overall less popular (between 42% and 33%). With the increase in the level of vaccination, they have also become more likely to travel abroad, initially mainly to neighboring (10%) and European countries to regenerate (32%), but by 2023 more people plan to travel outside of Europe (13%).

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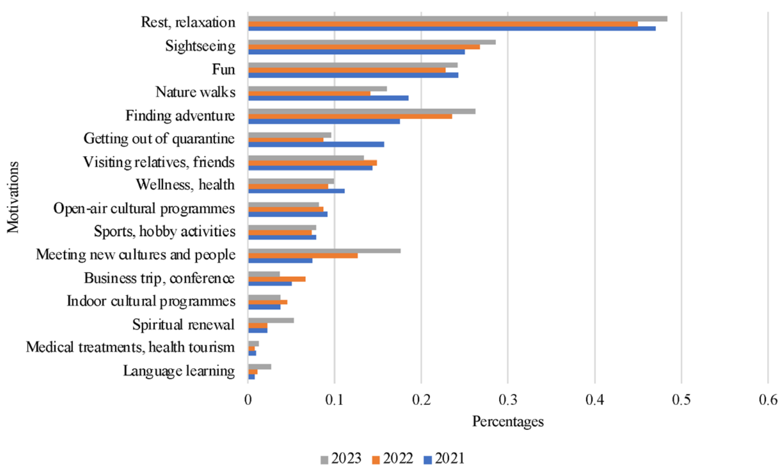
As regards the frequency of trips, both in 2021 and 2022, the most common were 3-4 times a year (35%). The highest increase was in 2022 for trips of 5-6 times a year (20%), while the highest increase for trips planned for 2023 was 1-2 times a year (40%), with more trips outside Europe.

One of the most important questions was the one regarding the motivations for travel. There were remarkable changes over the examined time period. As shown in Figure 2, in 2021, the motives and needs that had changed as a result of the pandemic (e.g. escaping from the quarantine, recreation, activities in nature, health, and wellness) were still dominant and popular. As the results illustrate, 2022 was the year in which the respondents tried to return to their pre-pandemic travel habits. They had a renewed desire for sightseeing, adventure, new cultures, and people, and even a resurgence of business travel, alongside the still popular leisure and recreational travel. In contrast, in 2023, the largest increase in travel plans among the respondents is for the purposes of relaxation, recreation, adventure, sightseeing and experiencing new cultures and people, in addition to the purposes of spiritual renewal. This shows that the need to maintain physical, mental, and spiritual health has remained strong throughout the period under examination and that the pandemic years have left a longer-term impact on consumers, who continue to prioritize this need in their travel choices.

Figure 2. Motivation for travel by year (N=670)



Source: Own elaboration

When examining motivations, the Chi-square test was also used in a multivariate analysis to see if there is a correlation between each age group and the choice of a particular type of motivation for traveling in 2022. A Chi-square test can only be performed if the sample is independent and identically distributed (i.e. representative), which is not fully met in this case. For this reason, the validity of these results is limited, the differences found in our sample cannot be generalized to the whole population, only to this sample. The result indicates that the probability that there is no difference by age group in the identification of rest as a travel motivation is 40% (Chi-square test statistic value is 5.1282). The null hypothesis is retained if the probability is 5% or higher (p-value>=0.05). In the present case, this is fulfilled, so the null hypothesis is retained, i.e. there is no relationship between the two criteria. For the other motivational items, we also performed the Chi-square test, the results of which are shown in Table 1.

Based on the results of Table 1, the significance level for nature walks is 4%, which is relatively high, although below 5%, and this motivation is more likely to be indicated by those aged 26-60, and less likely by those aged 60+ and under 18. The feeling of escaping from quarantine as motivation was slightly more likely to be used by younger people and those over 60 than by other age groups. Adventure and fun are clearly the motivations of young people, especially those under 18. Business travel and conferences are understandably not

Table 1. Results of the Chi square test

Examining the relationship between age groups and motivations among those who reported travelling in 2022 (independence analysis)	Chi-square level of significance (p-value)	CramersV	Is there a significant relation-ship?	Strength of relationship
Rest and relaxation	0.40	0.1	No	-
Sightseeing	0.08	0.14	No	-
Walk in nature	0.04	0.15	Yes	Weak
Sport and recreation	0.85	0.06	No	-
Escaping from quarantine	0.00	0.19	Yes	Weak
Adventure	0.00	0.34	Yes	Moderate
Having fun	0.00	0.34	Yes	Moderate
Participating in outdoor cultural event	0.15	0.12	No	-
Visiting friends and relatives	0.90	0.06	No	-
Wellness and health	0.19	0.12	No	-
Business and conference	0.00	0.2	Yes	Weak
Participating in indoor cultural events	0.13	0.13	No	-
Getting to know new cultures and people	0.00	0.18	Yes	Weak
Medical treatment	0.90	0.05	No	-

Notes: Green: p=0.0 implies high significance. Yellow: p=0.04 implies weaker significance.
Source: Own elaboration

mentioned by young people while learning about new cultures is the most common and is a motivation that is most typical of middle-aged people.

The means of transport and type of accommodation used were also questioned. It was found that while the pandemic situation was dire and the restrictions did not allow people to use other types of transportation, most people preferred to travel by private car. Consequently, the number and proportion of people using bicycles increased significantly and the proportion of people using air transport decreased quite a bit. 2022 saw the return of air travel and a decrease in the proportion of people using private cars and bicycles. It is noteworthy that the role of trains and buses has remained significant throughout the years, with trains accounting for almost 20% of total transport use in 2022 and buses 15%.

While there was a major shift in some types of accommodation, hotels and apartments remained the most popular with 25% and 20% shares respectively. In 2021, staying in their own holiday home or with relatives and friends was the most popular, while in 2022 the Airbnb sector grew, and the bed and breakfasts became more popular than larger hotels. There are likely to be health security reasons for this, as well as the fact that these accommodations offer more personalized services. This personalization is becoming a default expectation for the 21st century consumer in all services, including the tourism market (Csapó - Törőcsik 2020).

The timing of travel bookings is important information for tourism service providers, as it has a major impact on the predictability of their business. The following trends emerged from our survey: in both years surveyed (2021 and 2022), there is a significant share of non-travelers (20%), which has resulted in a rather large drop in turnover for operators and a sharp drop in profitability for tourism companies. Those consumers who did travel, however, had two booking periods each year. There is a significant proportion of booking a few weeks before the start of the trip (between 15-20%) and a similarly high proportion of booking a few months before the start of the trip (between 15-27%). For the trips planned for 2023, there is a marked increase in the proportion of consumers booking well before the start of the trip, which means not just 1-2 months, but 3-5 months and even half a year. The proportion of last-minute bookings was the highest in 2021 when the domestic and international epidemic situation was more unpredictable and various travel restrictions were in place in several countries.

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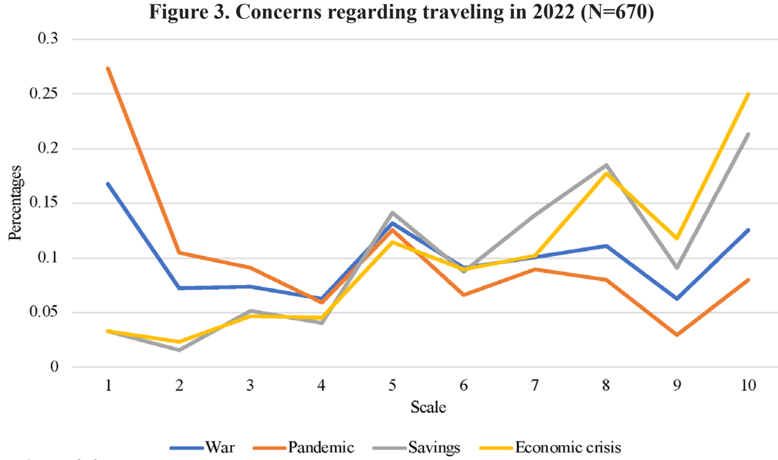
A specific part of the research was designed to explore the issues of safety and hygiene. In 2020 the health and safety aspect outweighed all the other needs and motivations. The research illustrates that while nearly 30% of the trips were defined by the pandemic situation in 2021, this share dropped to 15% in 2022. In parallel, the level of satisfaction with travel has also grown, with respondents mostly indicating their level of satisfaction with travel on a Likert scale of 1 to 10, ranging from 4 to 8 in 2021, which changed to 7 to 10 in 2022. In other words, the fewer the consumers who were forced to change their planned and desired trips, the higher their level of satisfaction with their trip as a whole was.

Compared to the research conducted in 2021 (Behringer *et al.* 2021), hygiene, vaccination levels, health security, and the pandemic situation were perceived as less important factors in the memories of the consumers in 2022. In the current research, respondents displayed the importance of these factors varied based on the different personality and consumer types. On a Likert scale of 1 to 10, all answers occurred, yet the epidemiological aspects were not as prominent. 65% of respondents ranked the vaccination the least important factor (1-3) and only 10% ranked it as the most important (8-10). The evolution of the pandemic had the most negligible impact on planning their travel with 58% rating it 1-3, and only 10% gave 8-10 when planning their travel in 2022. The role of hygiene was more divided among the respondents, with 33% of them rating it 1-3, the same number rating it 8-10, and 34% rating it somewhere between (4-7) when making their travel decisions in 2022.

All these factors were compared to the war and economic crisis that unfolded in 2022. Based on the results, this situation took over as the dominant factor in influencing consumer behavior. The consumers were no longer concerned about pandemics and sanitation when planning their travel but about energy prices and inflation. It had a significant impact on their financial opportunities and thus on their leisure tourism travel. As a result, consumers have been forced to reschedule their travel plans and, depending on their economic constraints, make their travel plans and budgets much more modestly than they had planned at the beginning of 2022.

As shown in Figure 3, while in 2022, hygiene and pandemic considerations did not play nearly as important a role in consumers' lives, their financial constraints due to their economic situation had a very sharp and pronounced impact on their travel options and future expectations.

Figure 3. Concerns regarding traveling in 2022 (N=670)



Source: Own elaboration

The Hungarian population is reacting sensitively to the new situation triggered by the emerging economic crisis. It is not the Russian-Ukrainian war or the COVID-19 pandemic that is affecting their consumer behavior, but the economic and financial constraints and the narrowing of their options, which are mainly felt in their own wallets. This is the factor that has the biggest effect on their future travel plans.

In parallel to the overall consumer behavior, the responsible behavior of tourists was also examined. The extent of their willingness for taking sustainability into account during their leisure travel plans is an important question in the 21st century. Both

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the demand and the supply sides should take responsibility for the sustainable tourism experience, but it is currently overshadowed by the economic recession and the cost of living. The demographic composition of the survey shows that most of the respondents were women living in bigger cities with higher education, traveling regularly, and being fairly compliant during the restrictions. They immediately changed their leisure travel habits as soon as the external factors allowed, while they tended to ignore the responsible and sustainable aspects of traveling. In other words, a much lower proportion of people think about sustainability when they travel for leisure than expected based on the overall responsible behavior in their daily lives. While in 2021 the ratio of the respondents who did not care about the sustainability of their travels (61% chose 5 or less on a Likert scale) was higher than in 2021 (57.2%) or in 2023 (56.9%) there is no significant difference in this aspect of their travel habits.

CONCLUSION AND IMPLICATIONS

The study sought to answer the question of how general travel habits changed among the Hungarian population after the pandemic outbreak. How did Hungarian consumers react to the external environmental factors that changed because of the virus that shocked the world? What new consumer behaviors and behavioral patterns emerged in the field of leisure tourism travel? To what extent have closures, quarantines, travel restrictions, and, initially, the strong fear of the COVID-19 outbreak been able to divert the population from satisfying their travel needs, which have been fundamentally transformed by the changes in external circumstances?

To explore this, an online questionnaire survey was conducted, exploring consumer behavior changes in travel behavior, the process of travel decision-making, the role of external influences, and the impact of internal personality traits and age group. It was completed by 672 respondents. It was a convenience sample, which limits the scope and validity of our findings, but the large and heterogeneous sample means that the conclusions can be applied to the whole population with some limitations.

Based on the survey, it can be concluded that the travel habits of the Hungarian population changed in many aspects after the pandemic, yet the basic need for travel remained. Moreover, after the restrictions were lifted, it emerged with even more force. The consumers tried to make up for their missed trips and the related experiences even with compromises. Travel also contributes to the preservation of mental health, and the Hungarian population still wants to travel for this reason? Even if they travel less often, to destinations closer to home using different means of transport and to different types of accommodation. This cannot be eliminated even by new adverse external environmental factors such as war, recessions, energy price rises, and inflation. These situations can only modify consumer habits. This means that service providers need to adapt to these changing demands and travel trends as much as possible and to be at the forefront with newer and more personalized tourism products, experiences and modern technologies if they want to retain customers in the future. At the same time, they need to respond to external environmental conditions and anticipate these new travel needs creatively and flexibly.

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