

ASSESSING UNCERTAINTY THROUGH *Safety* New Guidance for the Travel Industry

U.S. TRAVEL
ASSOCIATION®





ROGER DOW

President and CEO
U.S. Travel Association



ustravel.org/IndustryGuidance



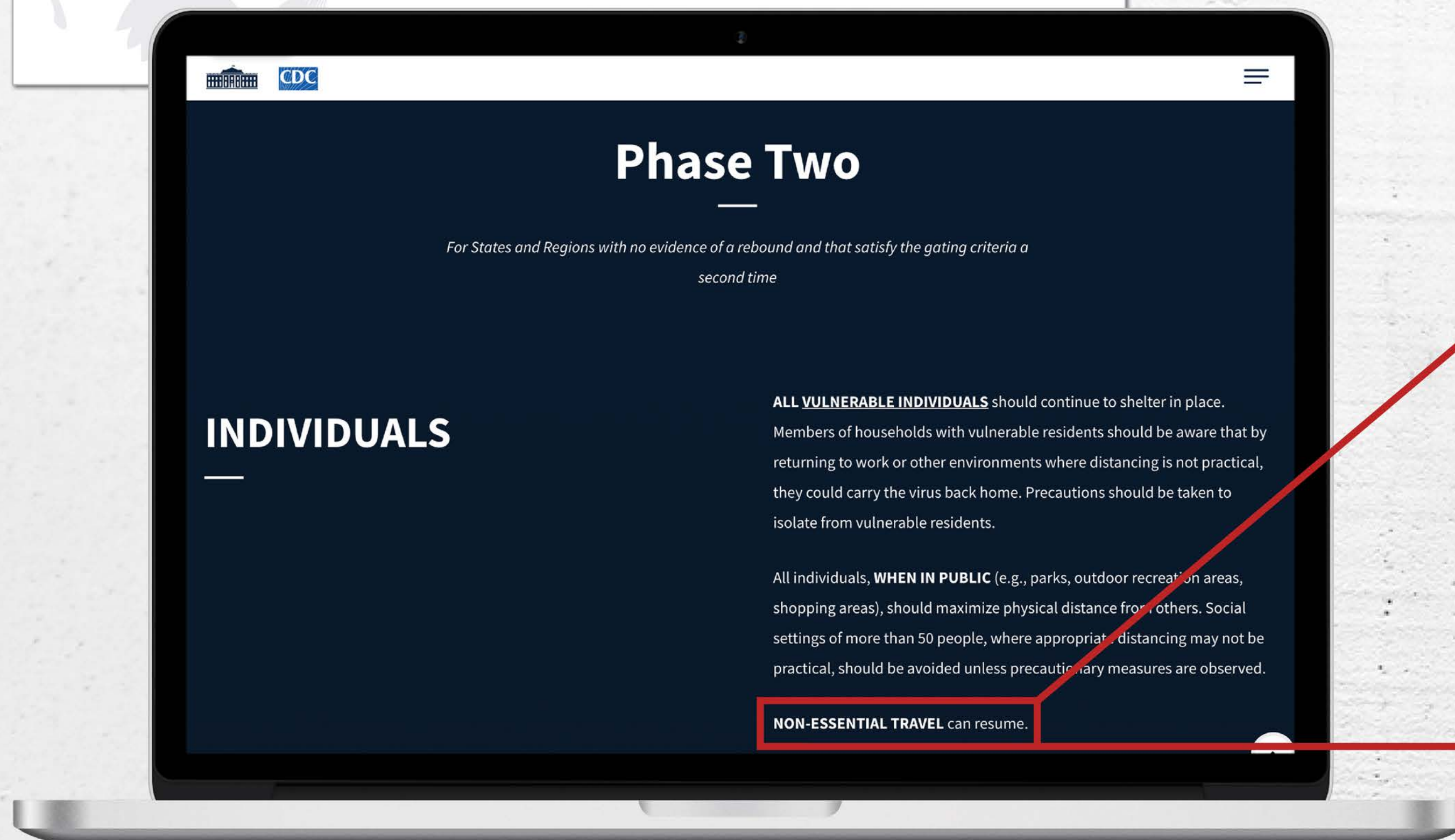
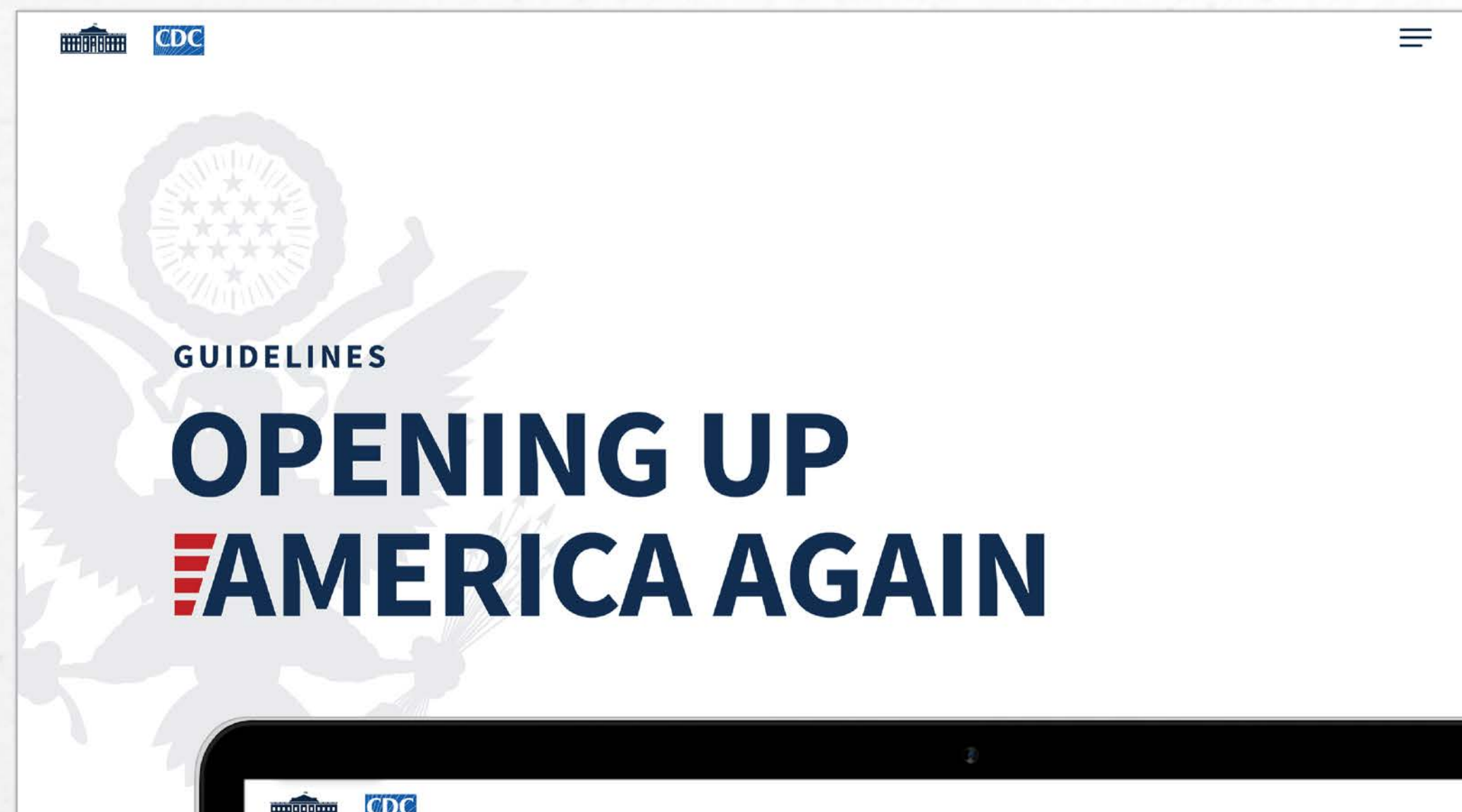


TORI EMERSON BARNES

Executive Vice President,
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“Non-Essential
Travel CAN
RESUME”

TOP PRIORITY

Traveler *Safety*

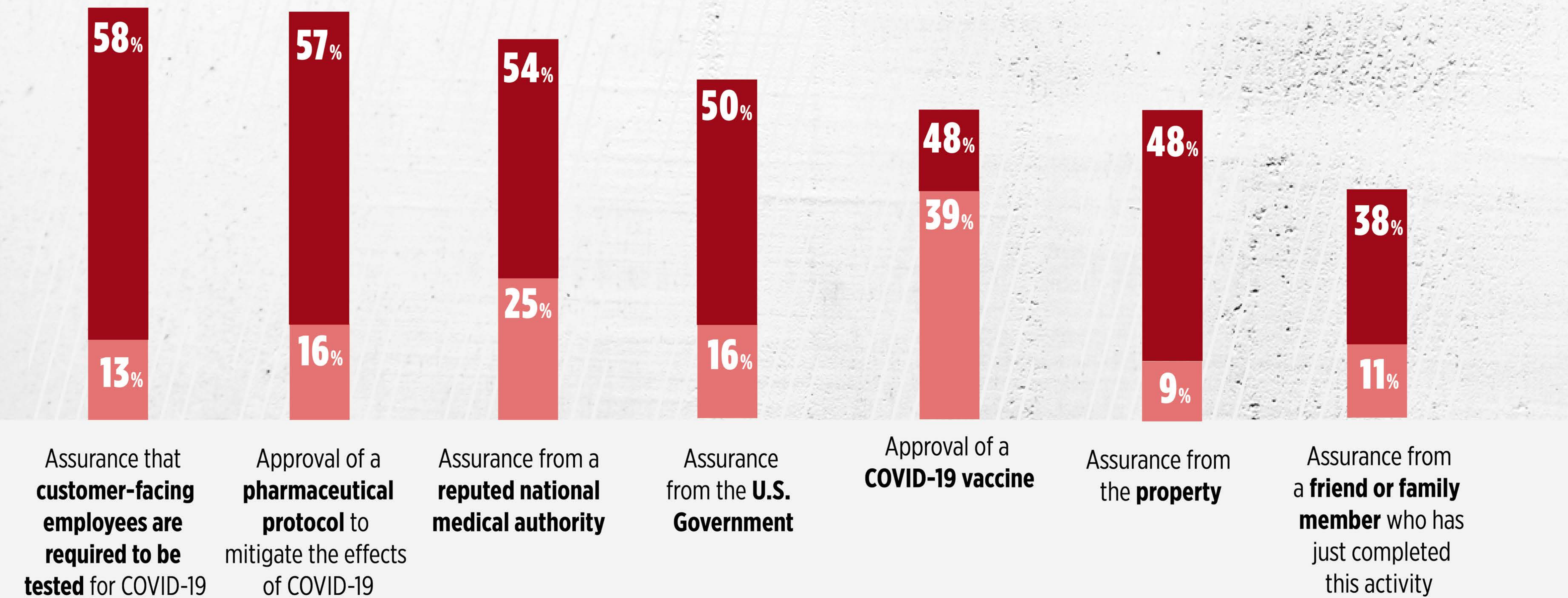
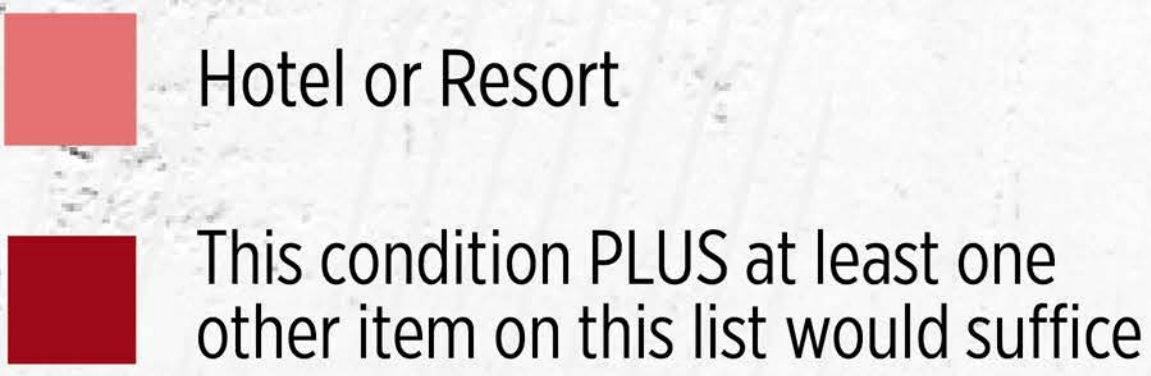


A LAYERED, PHASED APPROACH TO TRAVEL *Recovery*



More Than One Assurance is Vital

Q: Which of these singular occurrences (alone or in conjunction with something else) would make you comfortable to stay at a hotel or resort without hesitation?





ERIN FRANCIS-CUMMINGS

President and CEO
Destination Analysts

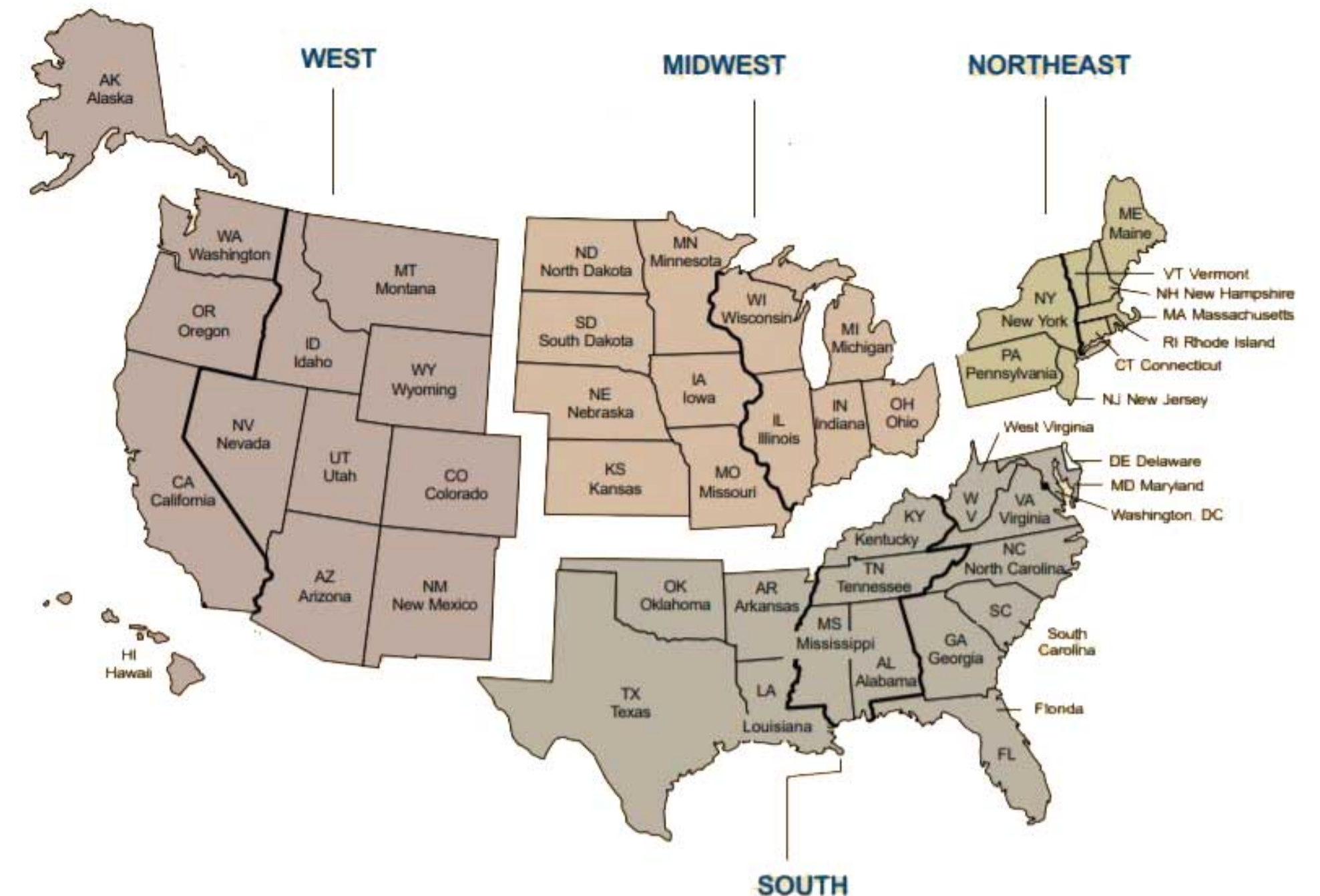
DESTINATION ANALYSTS' CORONAVIRUS TRAVEL SENTIMENT INDEX

Week of May 4th

Research Overview & Methodology

- Weekly tracking survey of a representative sample of adult American travelers in each of four U.S. regions
- Designed to track traveler sentiment and generate insights into when tourism businesses can expect demand to return and from whom
- Week 8 data (fielded May 1-3) will be presented today
- 1,208 fully completed surveys collected each wave
- Confidence interval of +/- 2.8%
- Data is weighted to reflect the actual population of each region

Map of U.S. Showing Survey Regions





IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted or influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

What do we most want?

Happiness

Friendship

Money

Love

Escape

Safety



A romantic scene of a couple embracing and holding wine glasses against a warm sunset background. The man is on the left, and the woman is on the right, both smiling and looking at each other. They are holding wine glasses, and the woman's glass is filled with red wine. The background is a soft, golden sunset with blurred lights.

QUESTION:

***Tell us about your lifestyle priorities
in the next six months.***

However you personally define each, use the scale
provided to indicate how you will prioritize these in the
next six months.

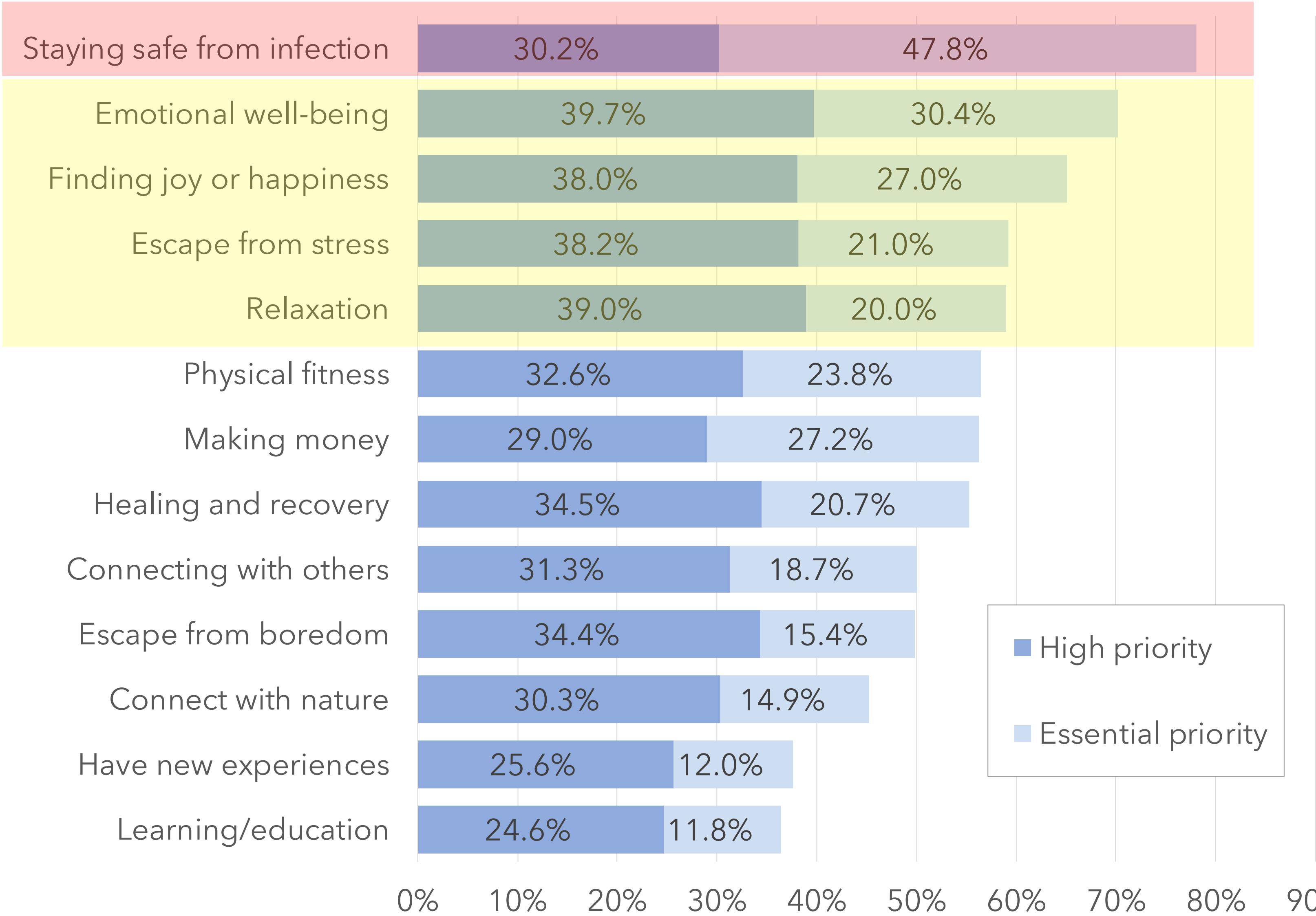
- Essential priority
- High priority
- Medium priority
- Low priority
- Not a priority

Traveler Priorities

Question: Tell us about your lifestyle priorities in the next six months.

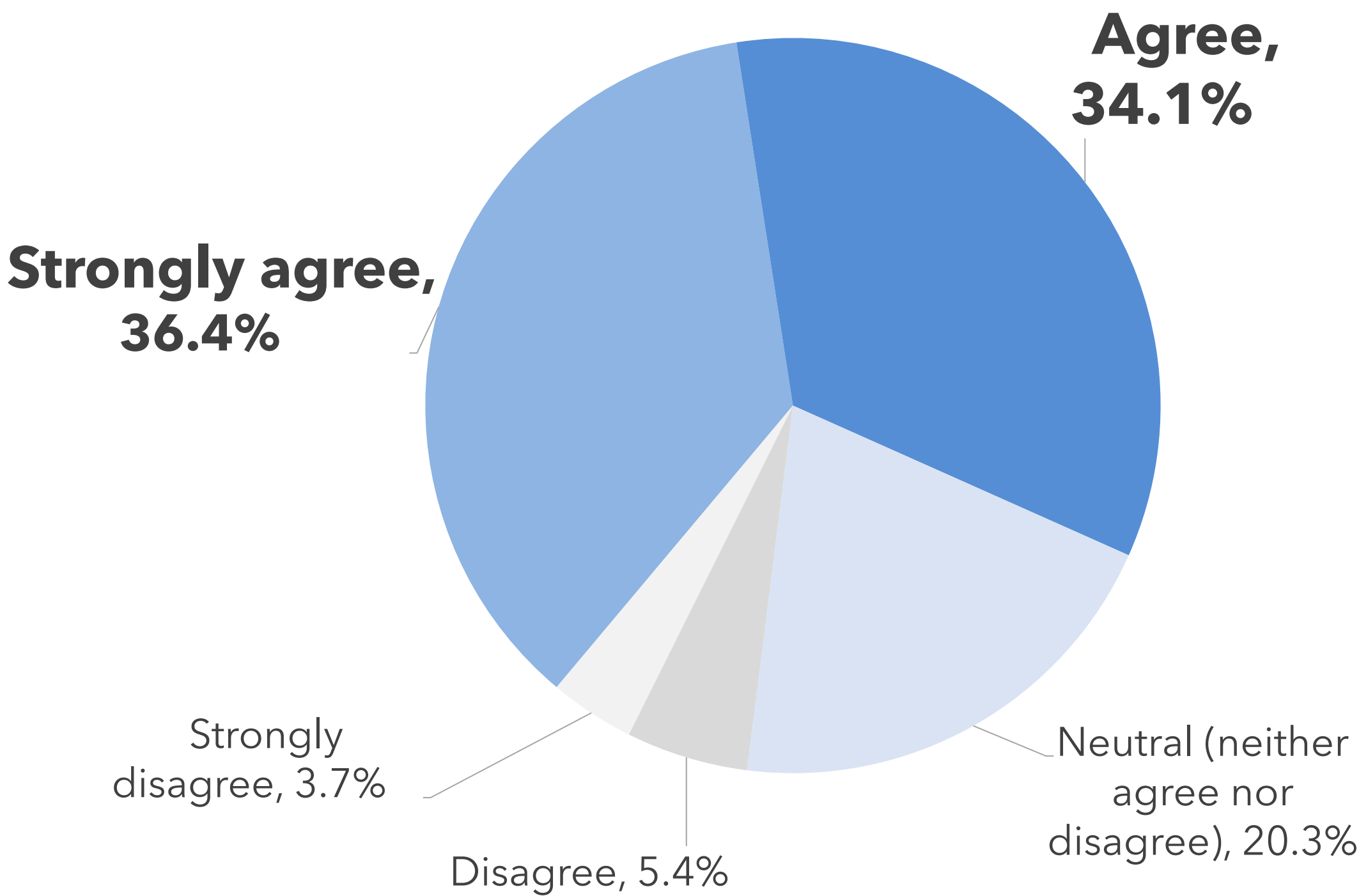
However you personally define each, use the scale provided to indicate how you will prioritize these in the next SIX (6) MONTHS.]

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)



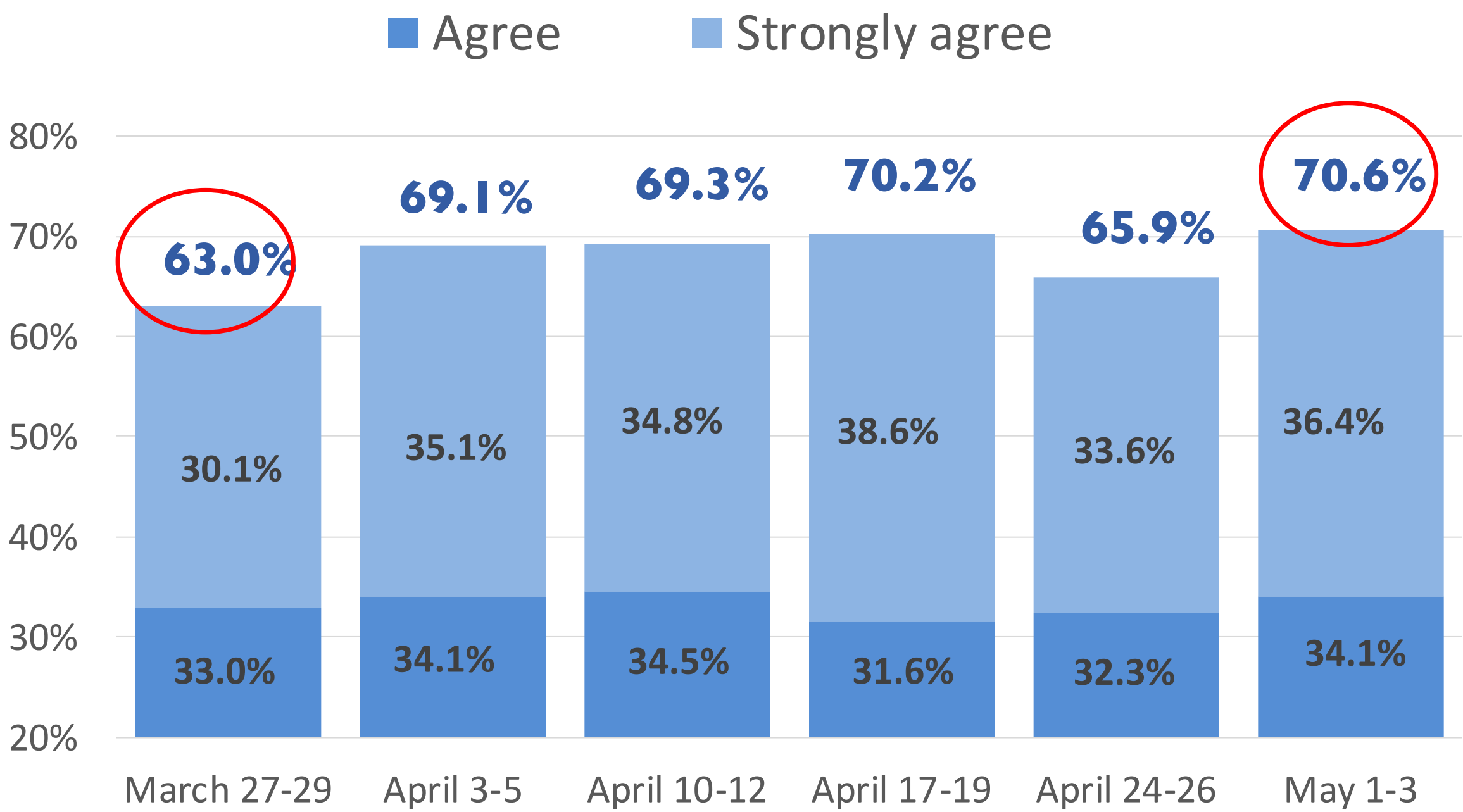
Excitement to Get Back to Travel

Q: How much do you agree with the following statement? I miss traveling. I can't wait to get out and travel again.



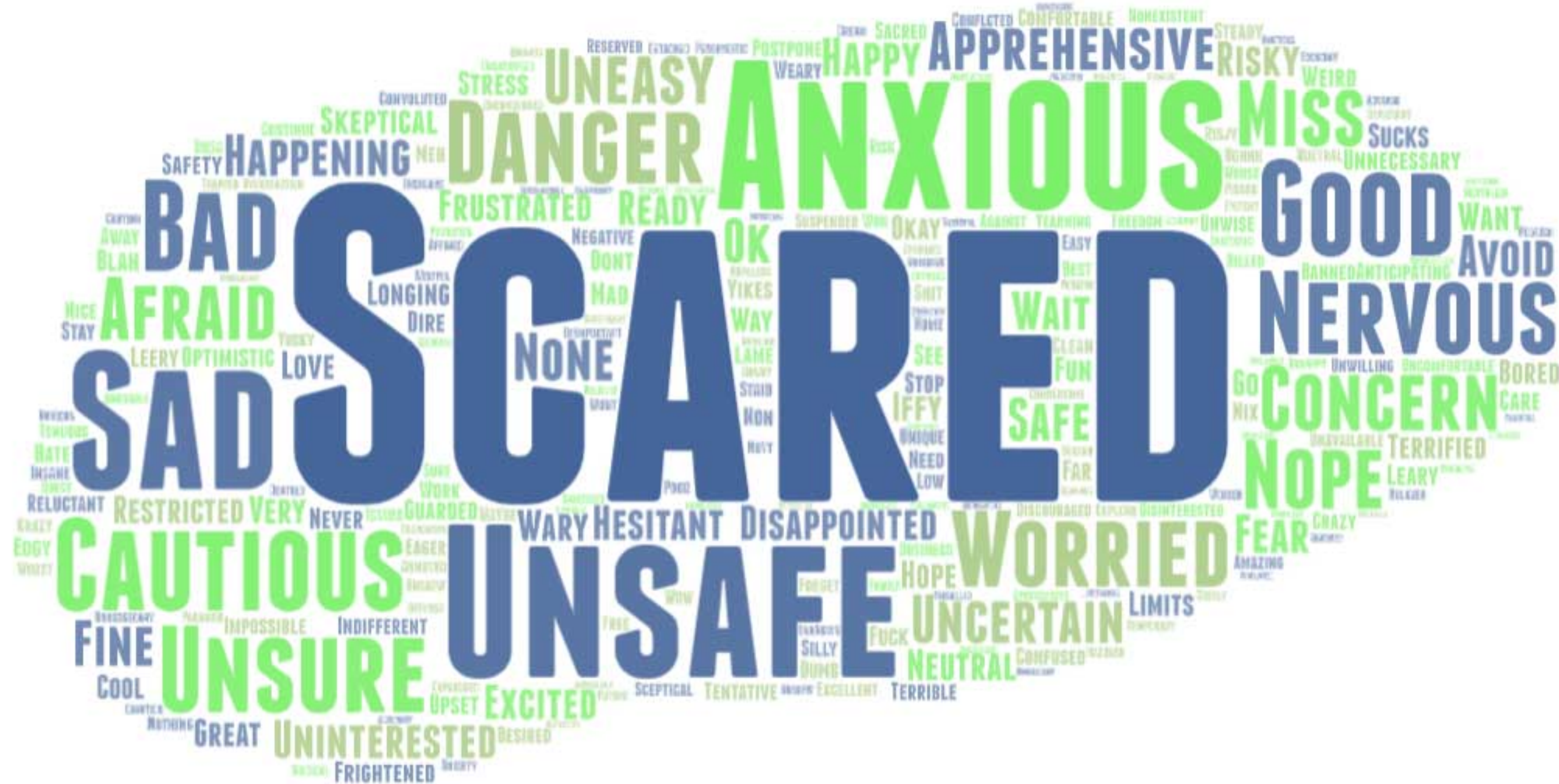
Excitement to Get Back to Travel

Q: How much do you agree with the following statement? I miss traveling. I can't wait to get out and travel again.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)

Q: What ONE WORD best describes how you feel about travel right now?



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DO YOUR RESEARCH

(Base: All respondents 1,208 completed surveys. Data collected April 24-26, 2020)

Personal Concerns & Perceptions of Safety



A man and a woman are smiling and posing in a room. The woman is on the left, wearing a white top and a yellow headband. The man is on the right, wearing a blue t-shirt. In the background, another man in a white shirt is visible, possibly working on a wall. The text "Are We Ready?" is overlaid in the center.

Are We Ready?

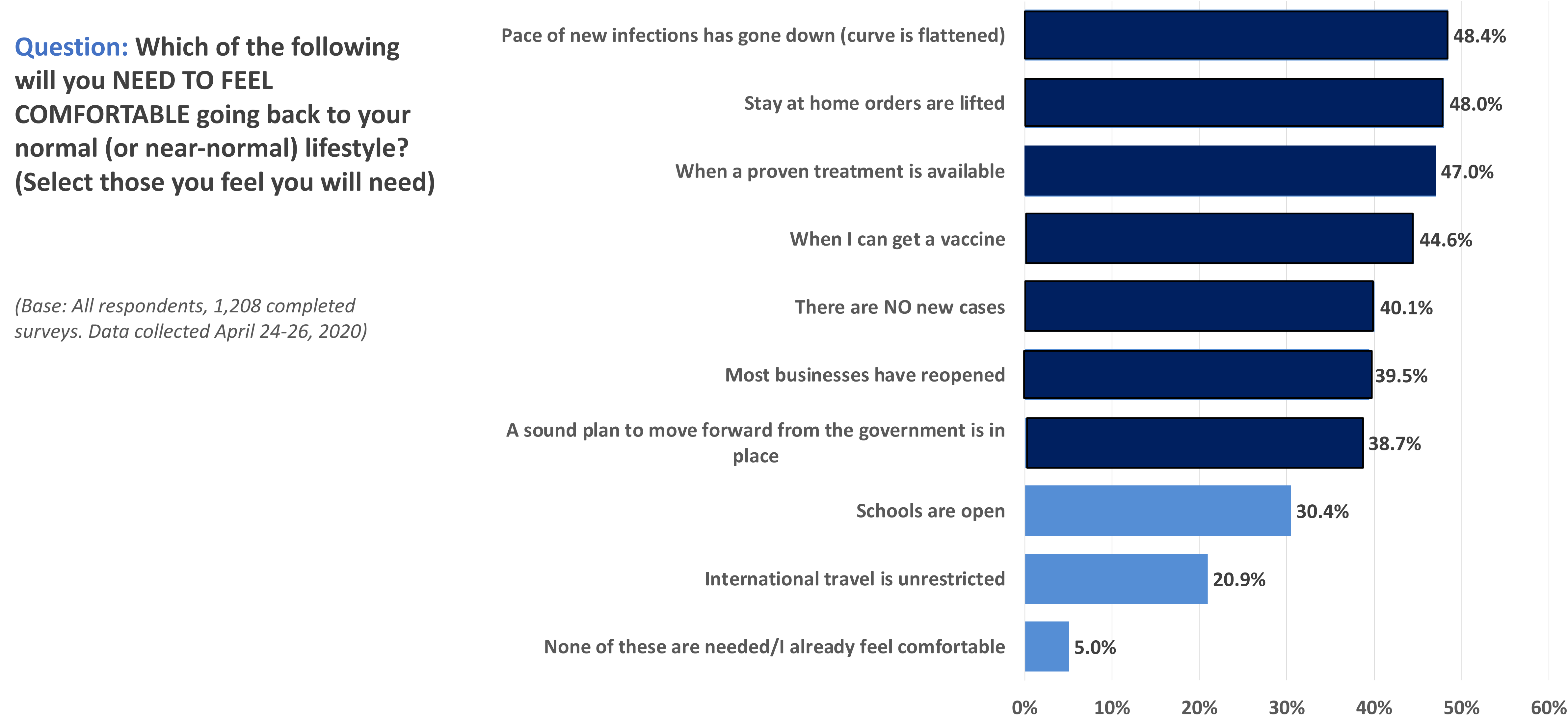
A person wearing a full-body white biohazard suit, including a hood and goggles, is working in a laboratory. They are holding a clipboard with a yellow biohazard warning sign that says "BIOHAZARD CONTROLS". In the foreground, another person's head and shoulder are visible, wearing a white lab coat and a light blue surgical mask. The background shows laboratory equipment and shelves.

What Do We Need to Be Ready?

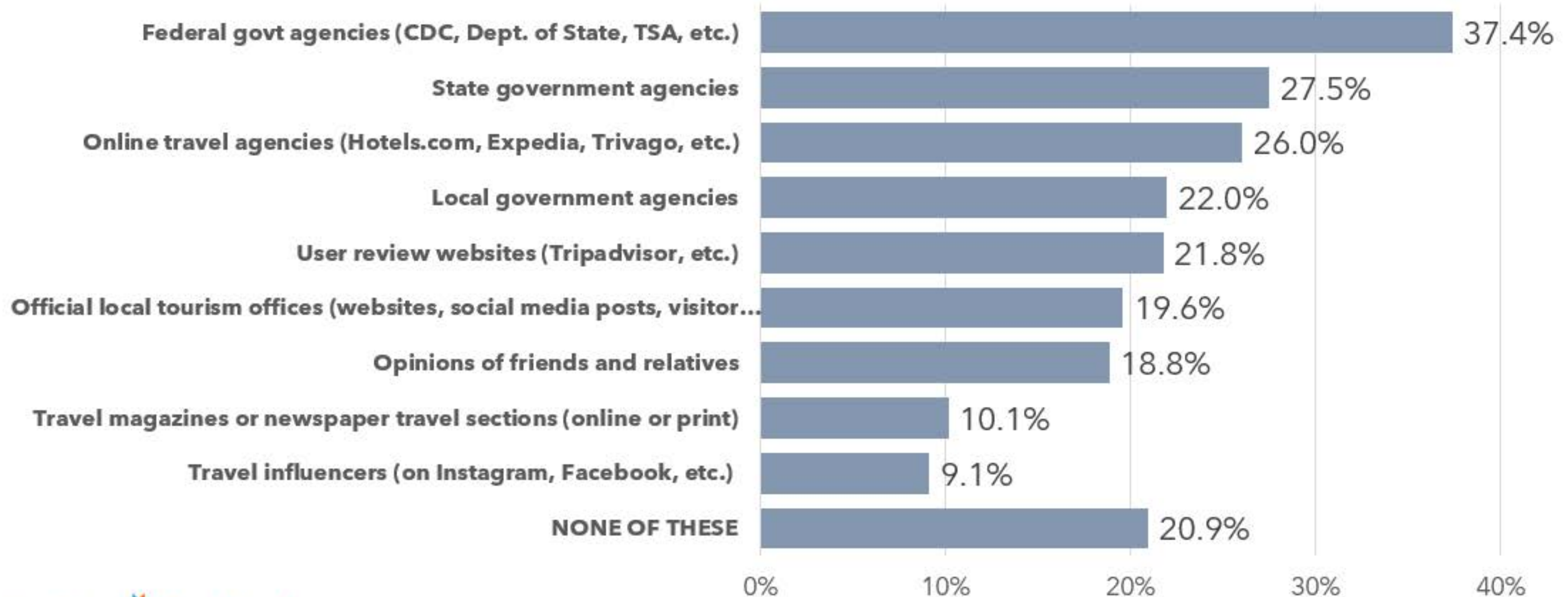
What Travelers Need to Feel Normal Again

Question: Which of the following will you **NEED TO FEEL COMFORTABLE** going back to your normal (or near-normal) lifestyle? (Select those you feel you will need)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)



Q: If you were to travel in the next three months, which of these resources would you use to prepare for your travels?



*"I think a few things. A part of it is hearing confirmation from national, regional and local governments that it is safe to travel and also safe to travel to those locations. Confirmation from government officials saying yes we are ready for visitors, that we have the medical equipment, that **yes we have different practices. I also want to see from the hotels that I want to stay at and other businesses that they're ready, their affirmation. Part of it is saying they are ready for you and ready to take care of their employees. So that affirmation: 'yep we're back in business, we're good to go and come on over'...**I just want that confirmation."*

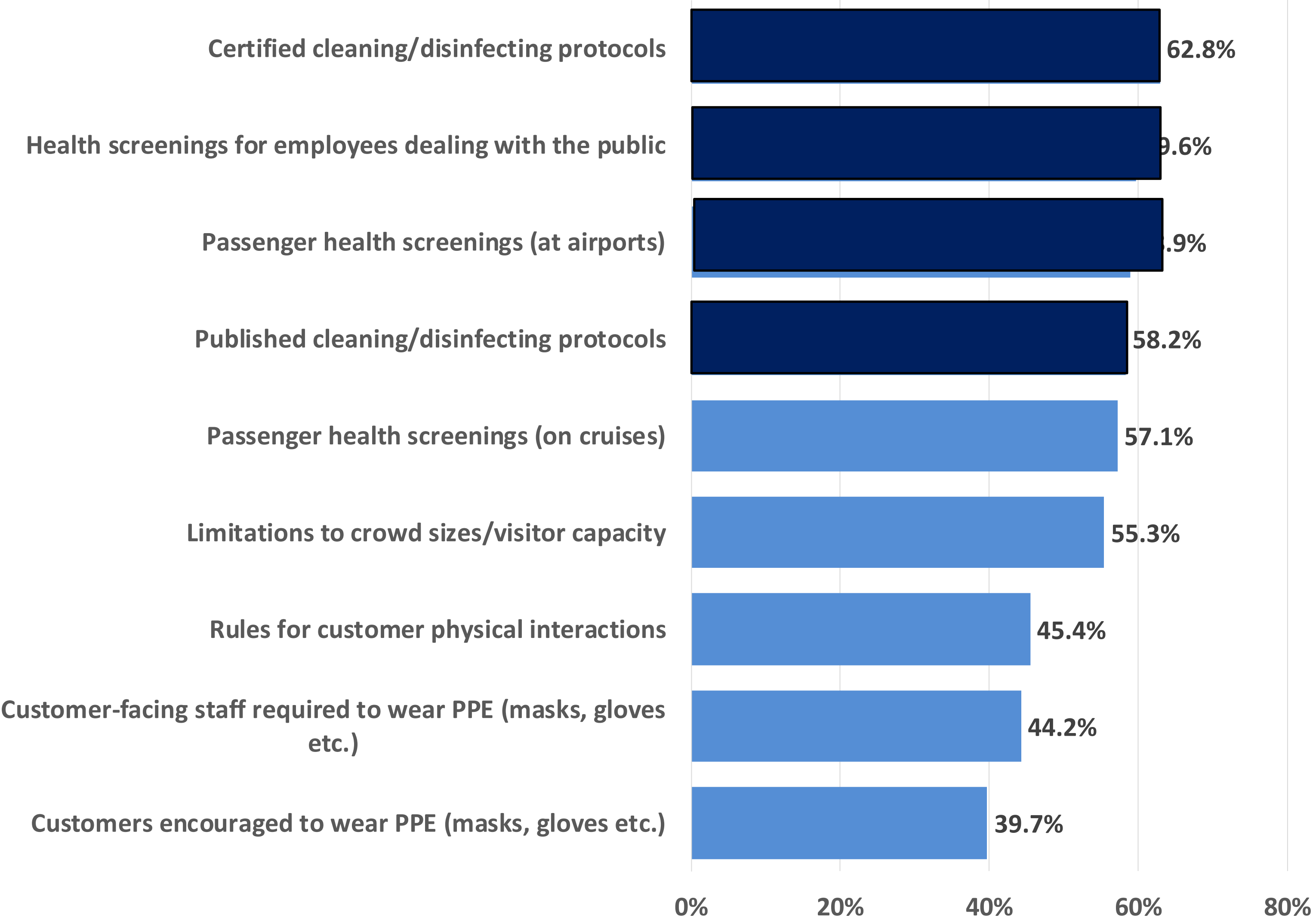
*"I think there are two important things for me. I will feel safe when Disneyland is back open—that is our current metric in our household. I think lots and lots of people, lots and lots of interaction from the host to the guest. **The general test for the nation: Is Disneyland open or is it not?**"*



Desired Common Business Practices

Question: Moving forward, which of these would you want to see as common business practices? (Select all that apply)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

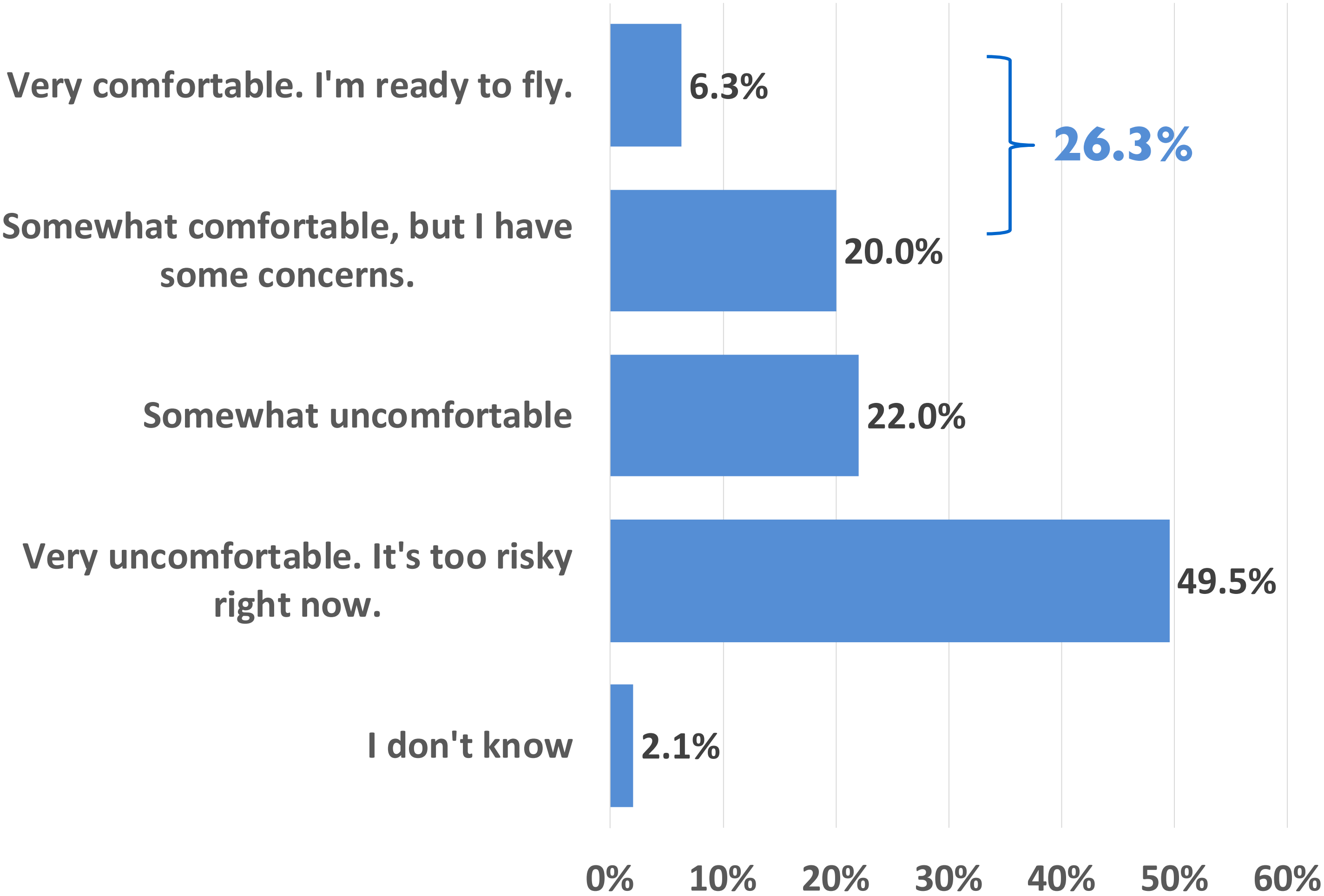





Readiness to Fly on Commercial Airlines

Question: Which best describes how you feel right now about traveling on a commercial airline?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



A person wearing a full-body white protective suit, a black face mask, and a white hood is using a yellow electrostatic sprayer to disinfect the interior of an airplane. The person is standing in the aisle, holding the sprayer and spraying the blue and white airplane seats. The cabin is empty, and the overhead storage bins are visible. The text on the left side of the image reads:

Definition: Please consider **HIGH-TECH CLEANING PRACTICES** to be practices such as electrostatic sprayers with hospital-grade disinfectant or ultraviolet light technology used to sanitize surfaces in an airplane.

Desired Operational Practices: Commercial Airlines

Question: If traveling on a **COMMERCIAL AIRLINE** in the future, which operational practices do you think should be used?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

If traveling on a **commercial airline** in the future, which operational practices do you think should be used?



High-tech cleaning of plane's interior between flights (71.0%)



Passengers provided with hand sanitizer, face masks, disinfectant wipes, etc. (70.3%)



Passenger health screenings (64.8%)



Empty middle seat policy (62.2%)



Health screening required for flight crew (62.1%)



Social distancing enforced at boarding area (60.9%)



Flight crew required to wear masks and gloves (57.7%)



Plane bathroom cleaned after each use (52.4%)



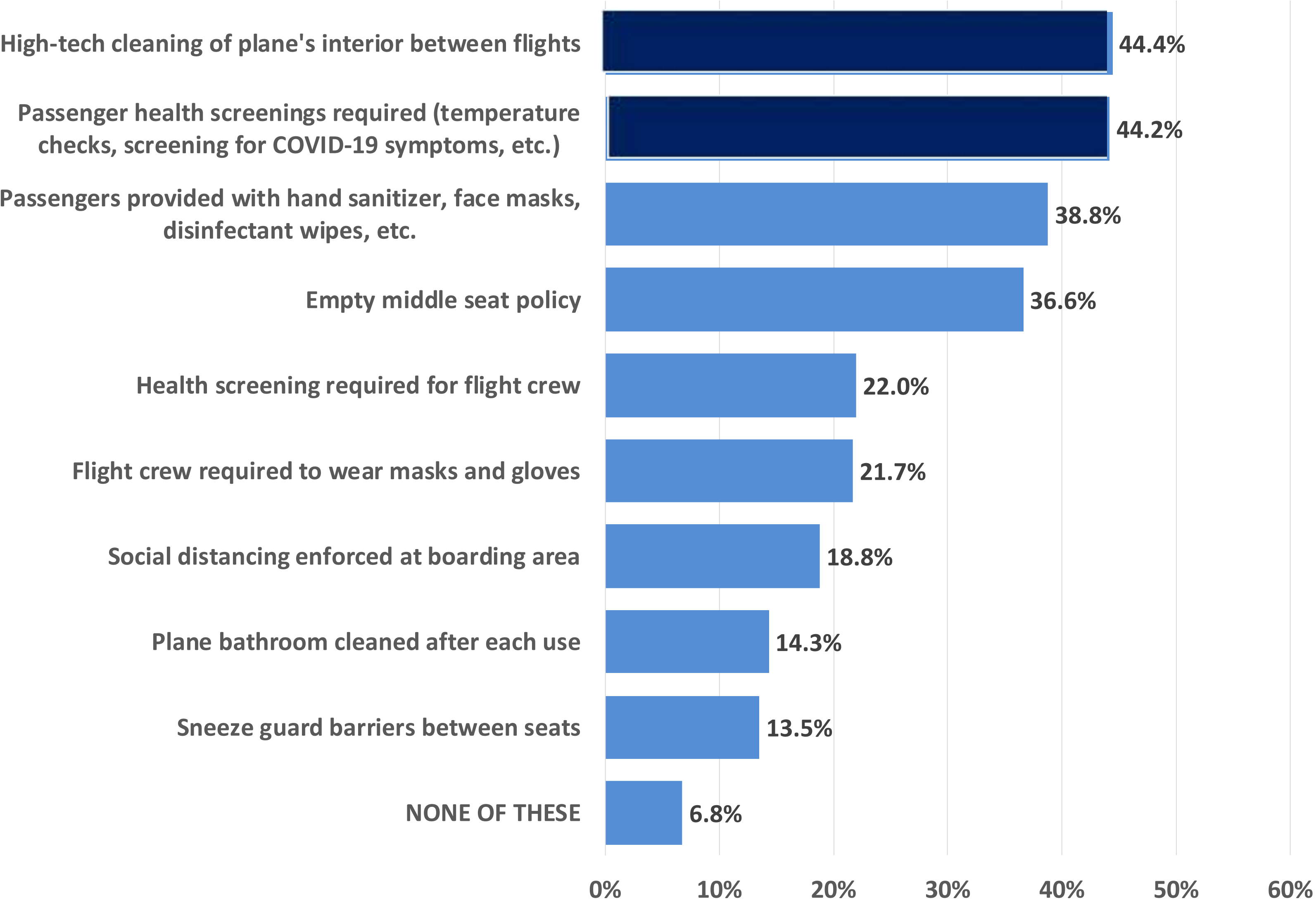
Sneeze guard barriers between seats (38.6%)

MOST IMPORTANT Operational Practices: Commercial Airlines

Question: If traveling on a **COMMERCIAL AIRLINE** in the future, which operational practices would **MAKE YOU FEEL MOST CONFIDENT** that the airline is looking out for your health?

(Please select the 3 that would be most important to you)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Desired Operational Practices: Hotels

Question: When staying in a hotel in the future, which operational practices do you think should be used?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

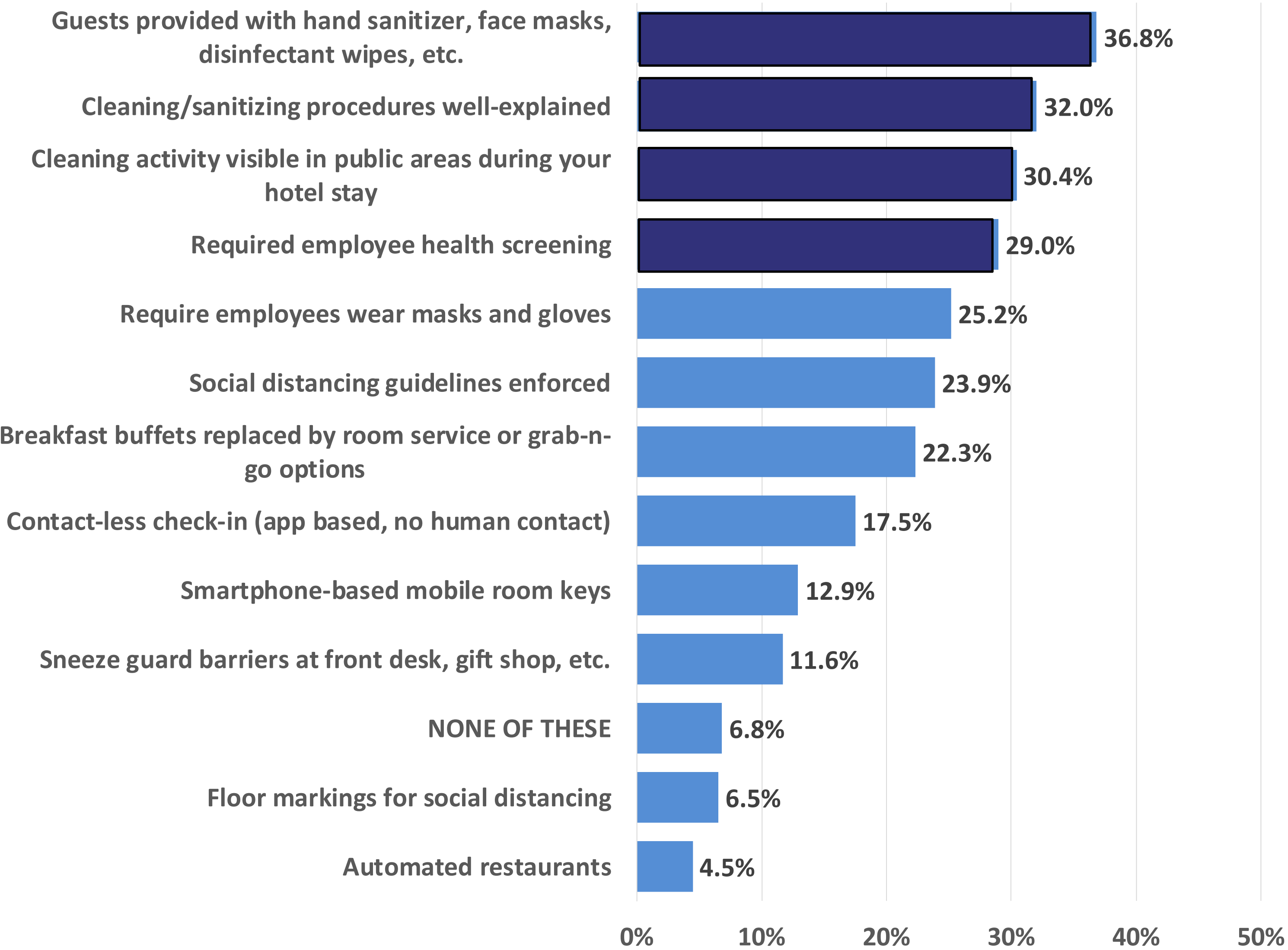
When staying in a **hotel** in the future, which operational practices do you think should be used?



MOST IMPORTANT Operational Practices: Hotels

Question: When staying in a hotel in the future, which operational practices would **MAKE YOU FEEL MOST CONFIDENT** that the hotel is looking out for your health? Please select the practices that would be most important to you.

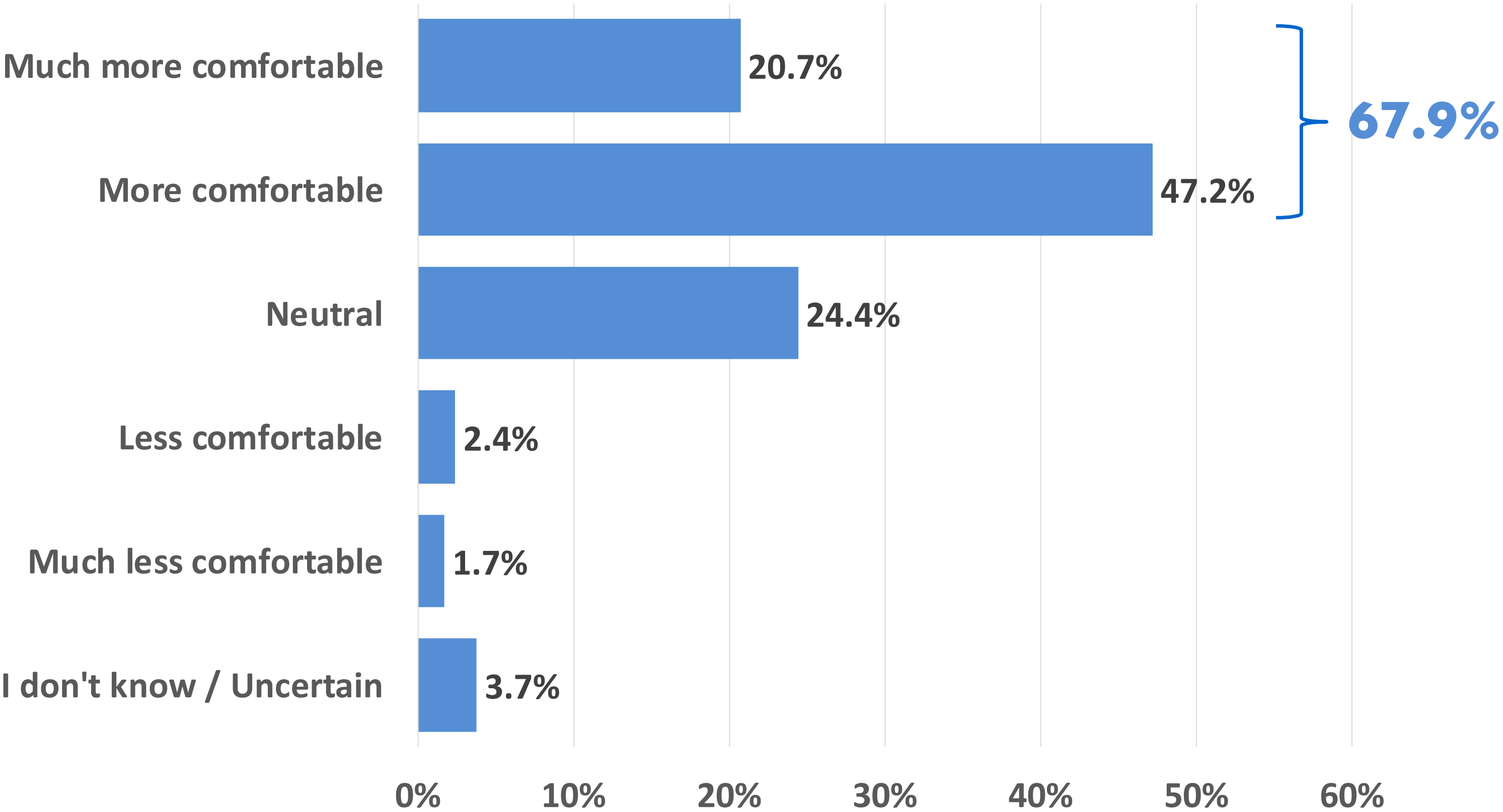
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Effect of High-Tech Cleaning Practices in Hotels

Question: Suppose a hotel used such high-tech cleaning practices. How would that affect your comfort level in staying at that hotel?

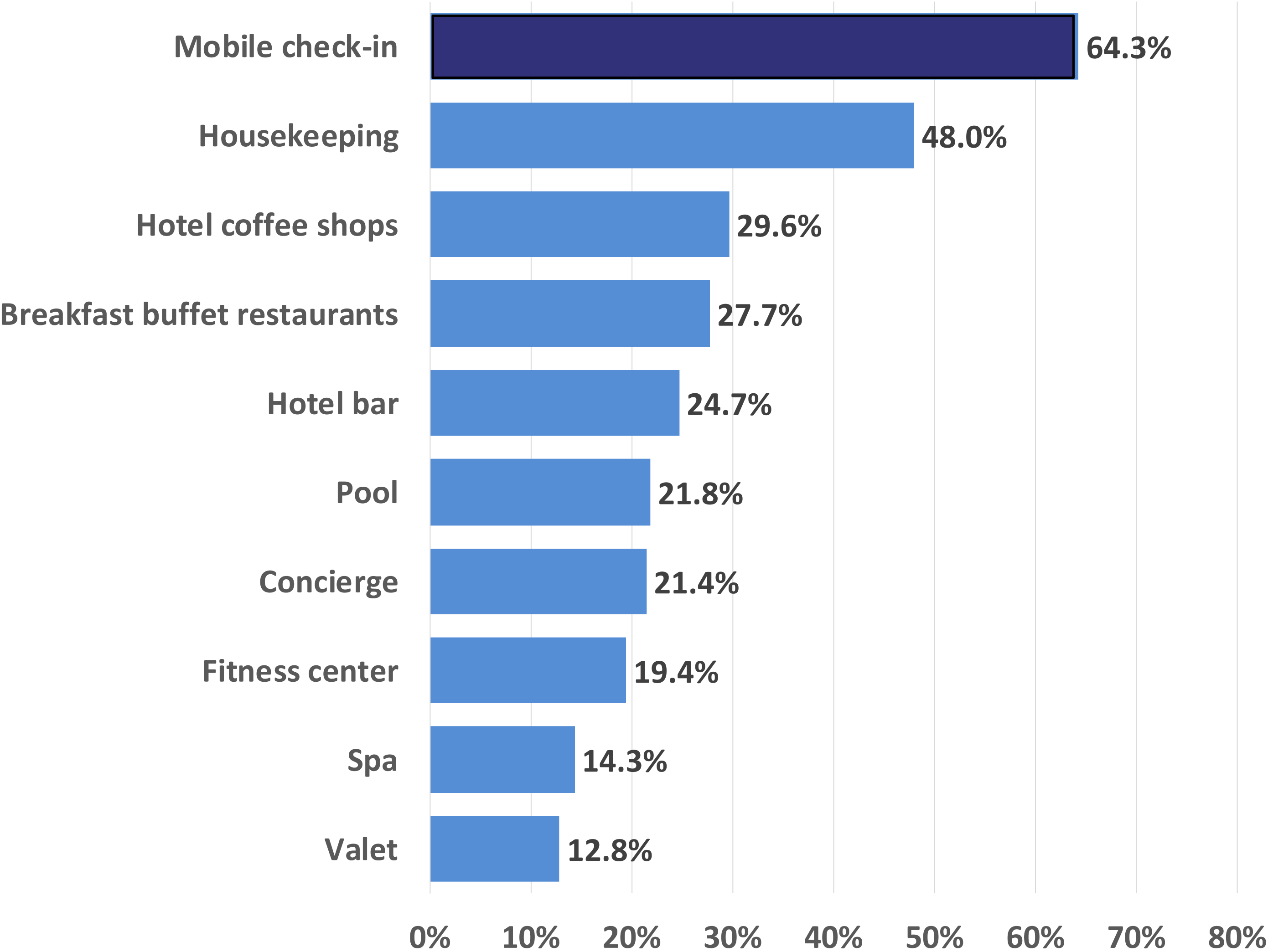
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Services During Next Hotel Stay

Question: The next time you stay in a hotel, how likely would you be to use these features/services?

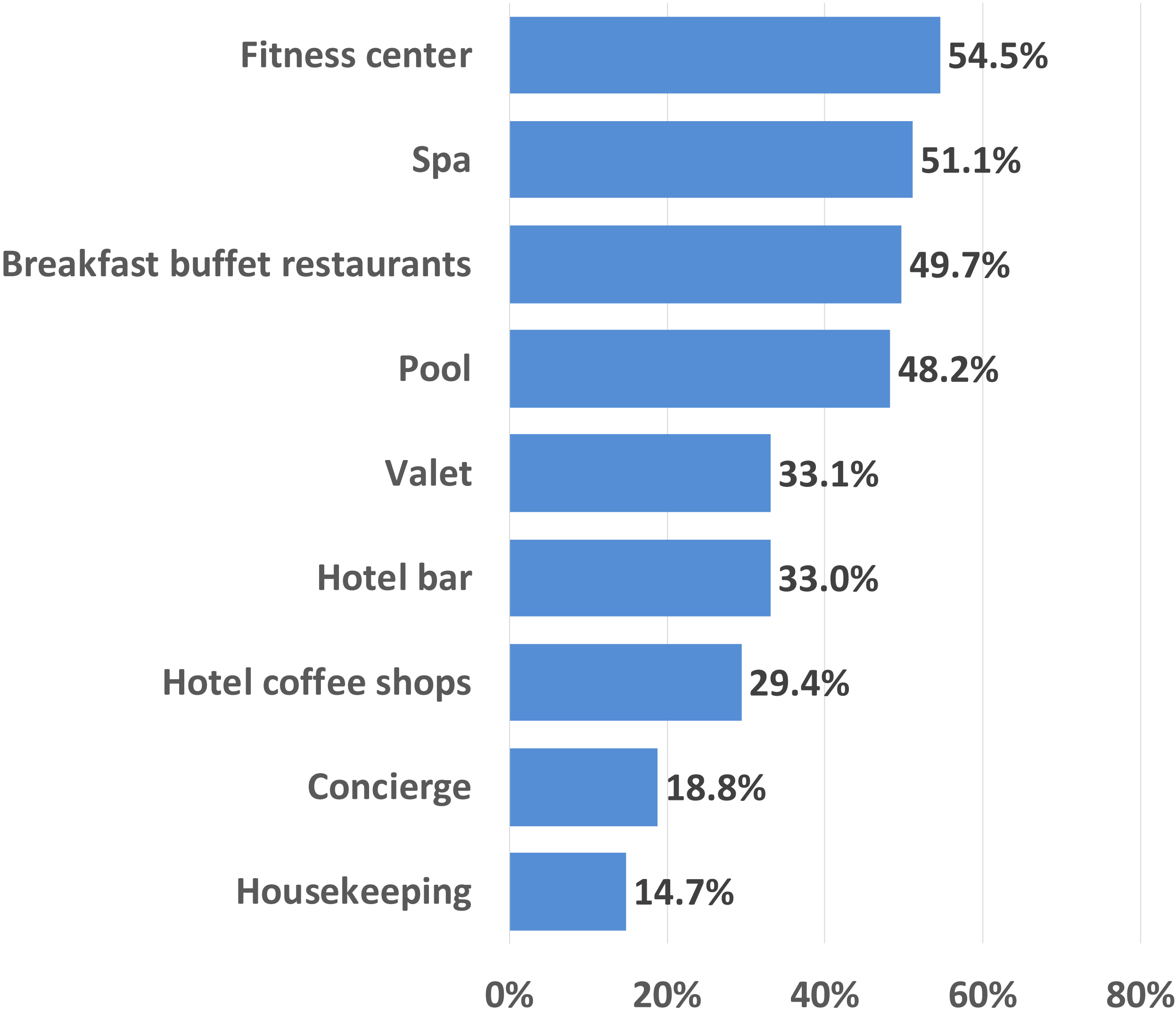
(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Hotel Services Impacted by Coronavirus Situation

Question: The next time you stay in a hotel, which features/services (IF ANY) will you be LESS LIKELY TO USE as a result of the coronavirus situation? (Select all that apply)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)



Desired Operational Practices: Commercial Public Spaces

Question: When thinking about visiting COMMERCIAL PUBLIC LOCATIONS (theme parks, concert or sports venues, shopping malls, etc.), what operational practices will you want to see used? (Select all that apply)

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

When thinking about visiting commercial public locations like theme parks, sports venues and malls, what operational practices will you want to see used?



Provide hand sanitizer (64.1%)



Provide disinfectant wipes (57.3%)



Cleaning activity during your stay (55.9%)



Clean procedures well-explained (55.1%)



Required employee health screening (51.9%)



Enforces social distancing (49.6%)



Sneeze guards/other barriers (47.5%)



Requires employees wear masks (43.4%)



Body temperature screening upon entry (42.1%)



Requires employees to wear gloves (42.1%)



Encourage visitors to wear masks (41.9%)



Pre-arrival health questionnaire (30.8%)

Desired Operational Practices: Restaurants

Question: When thinking about dining in RESTAURANTS what operational practices will you want to see used? (Select all that apply)

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)

When thinking about **dining in restaurants**, what operational practices will you want to see used?



Provide hand sanitizer (64.1%)



Clean procedures well-explained (58.0%)



Provide disinfectant wipes (57.0%)



Required employee health screening (55.5%)



Cleaning activity during your visit (53.8%)



Enforces social distancing (52.2%)



Sneeze guards/ other barriers (49.0%)



Requires employees to wear gloves (45.9%)



Requires employees wear masks (43.7%)



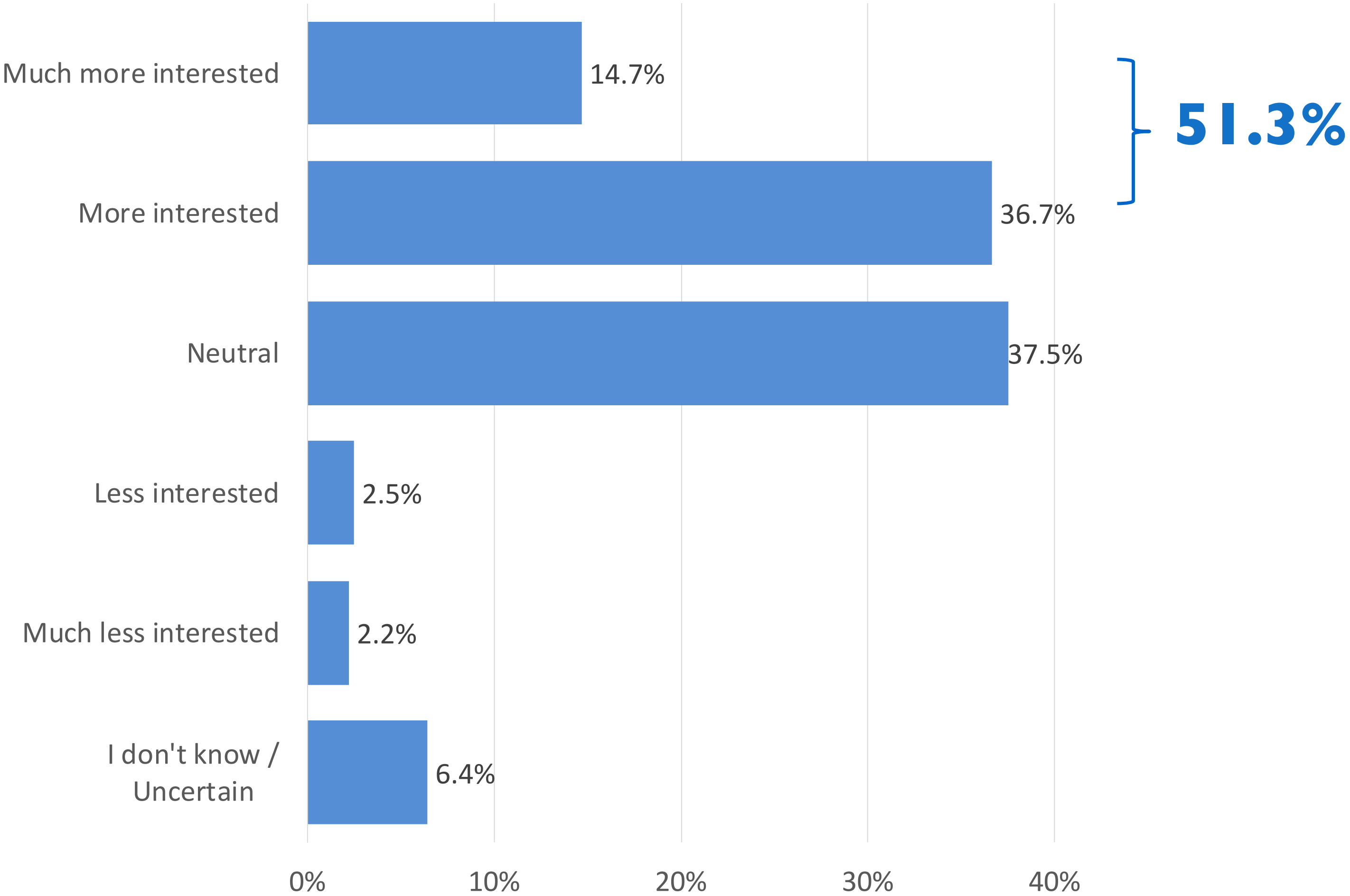
Encourage visitors to wear masks (32.3%)

Impact of Official Coronavirus Health & Safety Certification

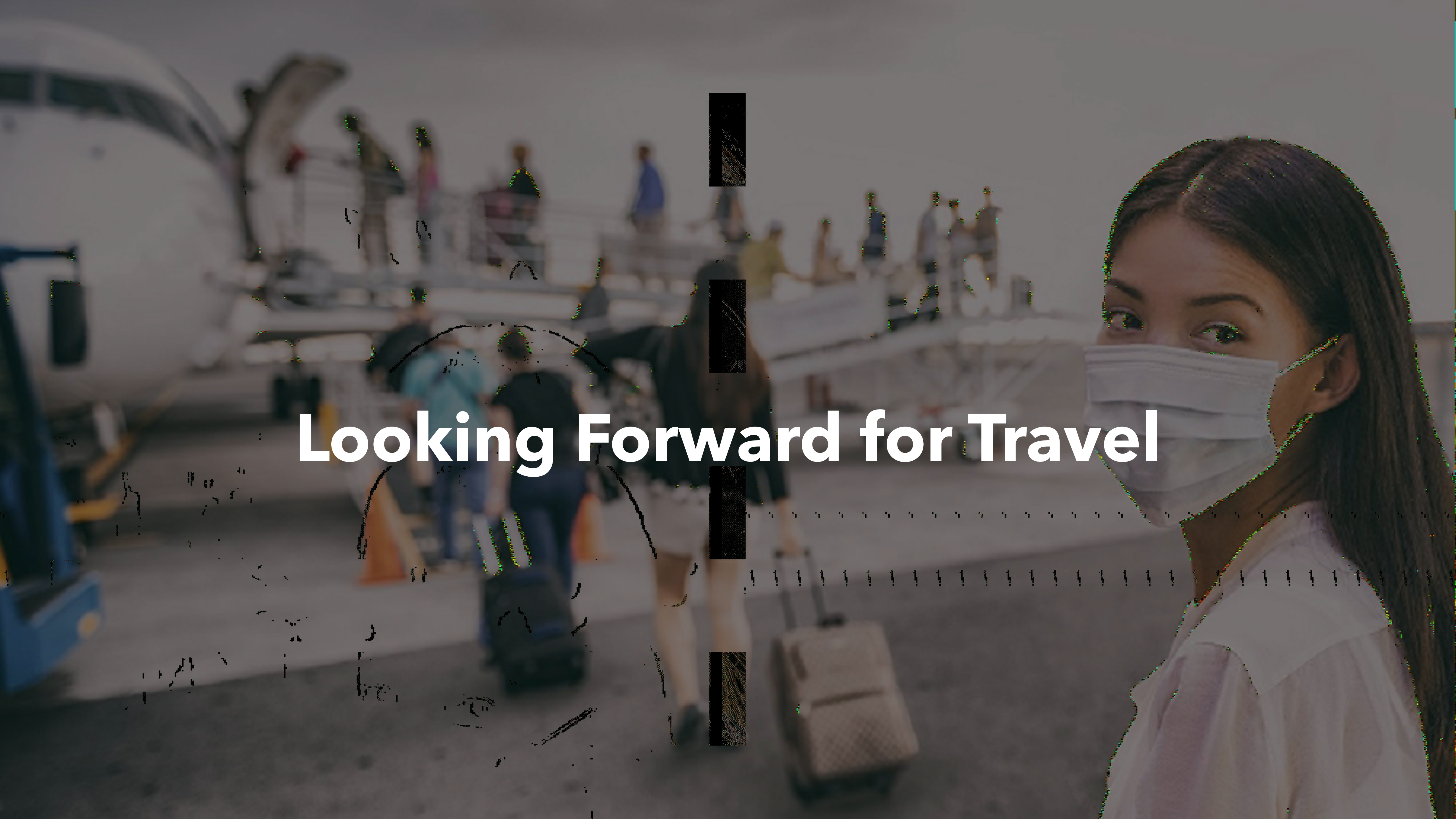
Question: All else equal, if a business such as a hotel, attraction or restaurant was issued an official "Coronavirus Health and Safety Certification", how would that affect your interest in visiting?

I would be _____

(Base: All respondents, 1,208 completed surveys. Data collected April 24-26, 2020)



Looking Forward for Travel



In the period after coronavirus, how are you going to approach getting back into travel?



47.0%

I'll get back in but carefully



39.9%

I'll test the waters first



13.1%

I'll jump right back in

KEY TAKEAWAYS

- **Maintaining health & safety is Americans' top emotional priority right now**
- **Travelers expect leadership from travel brands in signaling and guiding the safe return to travel**
- **New and significant changes and additions to business operating practices are necessary to attract back the travel volume of the past**
- **Businesses are likely to strongly benefit from following official guidelines and/or obtaining certifications, and publicizing adherence their adherence**



Next/Ongoing Updates

- Key Findings to Know released via email every Monday morning
- Complete Report of Findings sent (and dashboard updated) by each Tuesday morning
- Online Presentation of Findings every Tuesday at 8:00am PST/11:00am EST
- Shareable infographics and gifs week-daily on social media
T: @DA_Research
FB: @destinationanalystsindustry





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MICHAEL D PARKINSON MD, MPH, FACPM

Past President
American College of Preventive Medicine
Principal
P3 Health

CREATE TRANSMISSION BARRIERS

1 Travel businesses should adapt operations, modify employee practices and/or redesign public spaces to help protect employees and customers.

For some businesses these strategies will include practices such as:

- ✓ **Reinforcing hand hygiene** which can decrease the risk of transmission of respiratory viruses by ~50%;
- ✓ **Utilizing personal protective equipment** (PPE) such as masks and gloves;
- ✓ **Installing physical barriers**, such as transparent screens to provide proper separation between customers and employees;
- ✓ **Encouraging physical distancing** by posting new signage to ensure proper separation in lines and common areas, discouraging congregating in crowded areas, reconfiguring public spaces, or limiting the number of employees and customers in various areas;
- ✓ **Thinking creatively to limit staff physical contact with customers** where practical while still delivering superior service, for example, through online ordering, curbside service delivery, automated entrances and other practices;
- ✓ **Educating both employees and customers about their shared responsibility** to help protect each other in a COVID-19 environment.

CREATE TRANSMISSION BARRIERS

2 Travel businesses should consider implementing touchless solutions, where practical, to limit the opportunity for virus transmission while also enabling a positive travel experience.

This could mean implementing touchless or low-touch solutions, along with pursuing technological and innovative practices to further promote safe and enjoyable experiences. Such measures may include adopting contactless technologies or procedures for:

- ✓ **Ticketing;**
- ✓ **Identification;**
- ✓ **Check-in;**
- ✓ **Payment** for goods and services;
- ✓ **Automated ordering** and pick-up for food and services; and
- ✓ **A broader range of travel and hospitality amenities.**

ENHANCE SANITATION

3 Travel businesses should adopt and implement enhanced sanitation procedures specifically designed to combat the transmission of COVID-19.

To promote the health and safety of our customers and employees, every segment of the travel industry should deploy **enhanced sanitation procedures** that include:

- ✓ **Establish a policy implementing more frequent hand washing by all employees** and, in the absence of hand washing, make frequent use of an alcohol-based hand sanitizer (at least 60% alcohol);
- ✓ **Sanitizing more frequently, using products and disinfectants that meet requirements for effectiveness against COVID-19**; special attention to high-touch surfaces;
- ✓ **Providing hand sanitizer** in public areas throughout facilities;
- ✓ **Modifying business hours when necessary** to carry out thorough sanitation and disinfection procedures;
- ✓ **Providing new training for employees** on implementing these measures with oversight on execution;
- ✓ **Researching technological innovations** and testing new procedures, as appropriate, to enhance sanitation.

PROMOTE HEALTH SCREENING

4 Travel businesses should promote health screening measures for employees and isolate workers with possible COVID-19 symptoms and provide health resources to customers.

Travel businesses should **adopt health screening procedures** that require all employees:

- ✓ **To monitor** their health;
- ✓ **To not report to work** if they are ill and/or showing any symptoms; and
- ✓ **To self-isolate** if showing symptoms of COVID-19, if awaiting test results, or if diagnosed with COVID-19.

Travel employers and operators should **review their policies** to more easily enable employees to stay home when sick or when possibly exposed to the coronavirus.

Travelers also have a role to play in preventing the spread of COVID-19. To help them fulfill this responsibility, travel businesses should offer appropriate resources to customers to better enable them to monitor and screen their own health, including:

- ✓ **Signage** communicating COVID-19 symptoms;
- ✓ **Guidance** to local public health resources in case testing or treatment is needed;
- ✓ **Materials describing good health practices** to protect themselves and others;
- ✓ **Communications encouraging travelers to stay home if they are sick** and to postpone travel until they are well.

PROMOTE HEALTH SCREENING

5 Travel businesses should establish a set of procedures aligned with CDC guidance should an employee or customer test positive for COVID-19.

Should an employee or customer test positive, **travel businesses should follow an appropriate checklist of actions in response.** Travel businesses should follow guidance from leading public health authorities to define necessary actions in these instances.



FOLLOW FOOD & BEVERAGE SERVICE GUIDANCE

6 While COVID-19 is not a food borne illness, travel businesses should follow best practices in food and beverage service to promote health of employees and customers.

While COVID-19 is not a food borne illness, food and beverage service is an essential and ubiquitous part of the hospitality our industry provides to travelers. When serving food and beverages, travel businesses should follow [FDA's Best Practices for Retail Food Stores, Restaurants, and Food Pick-Up/Delivery Services During the COVID-19 Pandemic](#) and the National Restaurant Association's [COVID-19 Re-Opening Guidance](#).

They should also review the National Restaurant Association's longstanding [ServSafe guidelines](#) or comparable state program.



NEXT *Steps*

- ✓ **Creating messaging guidance** to communicate that **health/safety is our top priority**
- ✓ **Coordinating this message across every travel business**
- ✓ **Evolving this message** as needed to **restore confidence** among travelers and travel workers
- ✓ And **at the right time...pivoting to a message that inspires** and motivates travel again.



Q&A

