ASSESSING **UNCERTAINTY** THROUGH Safety

**New Guidance** for the Travel Industry

U.S. Travel Association®
During their journey, travelers will encounter many parts of the travel eco-system. This guidance aims to provide consistency in the approach to safety employed by travel brands and destinations during the customer experience.
TORI EMERSON BARNES
Executive Vice President, Public Affairs and Policy
U.S. Travel Association
TRAVEL in the New Normal

Industry Guidance on Promoting the Health and Safety of All Travelers

ustravel.org/IndustryGuidance
Phase Two

For States and Regions with no evidence of a rebound and that satisfy the testing criteria:

ALL VULNERABLE INDIVIDUALS should continue to shelter in place.

Members of households with vulnerable residents should be aware that by returning to work or other environments where distancing is not practical, they could carry the virus back home. Precautions should be taken to isolate from vulnerable residents.

All individuals, WHEN IN PUBLIC (e.g., parks, outdoor recreation areas, shopping areas), should maintain physical distance from others. Social settings of more than 10 people, where appropriate distancing may not be practical, should be avoided unless precautionary measures are observed.

NON-ESSENTIAL TRAVEL can resume.

“Non-Essential Travel CAN RESUME”
TOP PRIORITY
Traveler Safety
A Layered, Phased Approach to Travel Recovery

1. Communicate Industry-Wide Health and Safety Guidance
2. Expand Availability and Accessibility of Testing
3. Promote and Incentivize Travel
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?

- Assurance that customer-facing employees are required to be tested for COVID-19 (58%)
- Approval of a pharmaceutical protocol to mitigate the effects of COVID-19 (57%)
- Assurance from a reputable national medical authority (54%)
- Assurance from the U.S. Government (50%)
- Approval of a COVID-19 vaccine (48%)
- Assurance from the property (48%)
- Assurance from a friend or family member who has just completed this activity (38%)

SOURCE: Engagious Mid April 2020 Back-to-Normal Barometer
ERIN FRANCIS-CUMMINGS
President and CEO
Destination Analysts
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
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?

- Money
- Friendship
- Escape
- Safety
- Happiness
- Love
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)

<table>
<thead>
<tr>
<th>Priority</th>
<th>High Priority (%)</th>
<th>Essential Priority (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staying safe from infection</td>
<td>30.2%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Emotional well-being</td>
<td>39.7%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Finding joy or happiness</td>
<td>38.0%</td>
<td>27.0%</td>
</tr>
<tr>
<td>Escape from stress</td>
<td>38.2%</td>
<td>21.0%</td>
</tr>
<tr>
<td>Relaxation</td>
<td>39.0%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Physical fitness</td>
<td>32.6%</td>
<td>23.8%</td>
</tr>
<tr>
<td>Making money</td>
<td>29.0%</td>
<td>27.2%</td>
</tr>
<tr>
<td>Healing and recovery</td>
<td>34.5%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Connecting with others</td>
<td>31.3%</td>
<td>18.7%</td>
</tr>
<tr>
<td>Escape from boredom</td>
<td>34.4%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Connect with nature</td>
<td>30.3%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Have new experiences</td>
<td>25.6%</td>
<td>12.0%</td>
</tr>
<tr>
<td>Learning/education</td>
<td>24.6%</td>
<td>11.8%</td>
</tr>
</tbody>
</table>

**Destination Analysts**

DO YOUR RESEARCH
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, 1204 completed surveys.)
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?
Personal Concerns & Perceptions of Safety
Are We Ready?
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?

- Federal gov't agencies (CDC, Dept. of State, TSA, etc.) - 37.4%
- State government agencies - 27.5%
- Online travel agencies (Hotels.com, Expedia, Trivago, etc.) - 26.0%
- Local government agencies - 22.0%
- User review websites (Tripadvisor, etc.) - 21.8%
- Official local tourism offices (websites, social media posts, visitor info) - 19.6%
- Opinions of friends and relatives - 18.8%
- Travel magazines or newspaper travel sections (online or print) - 10.1%
- Travel influencers (on Instagram, Facebook, etc.) - 9.1%
- NONE OF THESE - 20.9%
"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)

- **Very uncomfortable. It's too risky right now.** 49.5%
- **Somewhat uncomfortable** 22.0%
- **Somewhat comfortable, but I have some concerns.** 20.0%
- **Very comfortable. I'm ready to fly.** 6.3%
- **I don't know** 2.1%
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)
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)
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)

- Much more comfortable: 20.7%
- More comfortable: 47.2%
- Neutral: 24.4%
- Less comfortable: 2.4%
- Much less comfortable: 1.7%
- I don't know / Uncertain: 3.7%

Total: 67.9%
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)
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)
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)
**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
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.
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**.
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.
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.
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.