Executive Summary

By

Center for Tourism Research & Development
Tourism Crisis Management Institute
Department of Tourism, Recreation and Sport Management
University of Florida
P.O. Box 118208
Gainesville, FL 32611, USA
(352) 392-3992 (phone)
(352) 392 7588 (fax)

July 2008
Executive Summary

The tourism industry encompasses multiple interrelated businesses, and visitor expenditures permeate throughout the sectors that generate income, jobs and tax revenues. However, tourism is extremely vulnerable to crisis and disasters which can have devastating and sustained long-term impacts for destinations and the economy. Hence, it is imperative to focus on crisis planning and preparedness for the industry. The purpose of this study was to explore current levels of crisis planning and preparedness in the U.S. tourism industry.

This exploratory study employed phone interviews with key tourism organization leaders (national and statewide). The total sample (N=365) was based on a list of attendees from two annual conferences: Tourism Industry Association (TIA), and Florida Association of Convention and Visitors Bureau (FACVB). Based on the total sample, 158 phone interviews were completed in January 2008 that resulted in a response rate of 43%.

The sample consisted of representatives from three main tourism industry sectors: Lodging (3%), Attraction (9%), and Promotion (88%). The Lodging segment consisted generally of large resort properties that were independently as well as franchise operated businesses. The Attraction segment was largely nature-based attractions and theme parks, while the Promotion segment comprised of mostly Destination Management Organizations (DMO) followed by Tourism Boards. All entities reported an average of 33 years in operation with one fourth of the sample located in the state of Florida.

On average, all organizations/businesses reported a high involvement (63%) of their headquarters/CEO in emergency preparedness planning. About 28% noted to be 'somewhat involved' while 5% noted 'lack of involvement'. Also, the ultimate decision maker in times of crisis was reported to be the President (32%) and Chief Executive Officer (13%). However, about 53% also indicated other personnel were the primary decision maker. In terms of resource allocation commitment, 58% noted that their organization/business provides emergency preparedness training for employees. About 49% reported that their organization/business has a seat at the Emergency Operations Center (EOC) during an emergency in their area/region. In addition, 37% indicated that their organization/business has access to a centralized reservation system to place evacuating visitors or incoming emergency workers in available lodging properties in their area/region.

Respondents were also asked to indicate whether their organization/business has had any experience with emergencies/crisis that ranged from natural (e.g. weather, natural disasters, etc.) to human-induced (e.g. terrorism, crime, etc.) in the last five years. Weather emergencies (75%), natural disasters (65%), and crime (40%) were identified as the top three. The bottom three included terrorism (8%), disease (5%), and political instability (1%).

Communication procedures were more consistent across segments as respondents noted that their organization/business had a direct communication procedure with largely local agencies related to emergency preparedness and tourism during emergencies/crises. Official state tourism office (92%), local tourism industry (89%), local media (88%), local and county government (87%), and local emergency management agency (85%) were largely represented. The least engaged form of communication was with the national government (32%) and the federal emergency management agency (33%).

Overall, crisis planning varied widely within the three segments of the tourism industry. The majority (78%) of organization/business had a written emergency preparedness plan for employees. All lodging segment properties indicated they had a plan whereas 77% of attractions and promotions had plans respectively. Among those that had a written emergency preparedness plan for employees, 80% indicated it was updated annually; 92% noted the plan was specific to their organization/business, and 87% reported
that the plan was in coordination with local emergency services. Similarly, about 45% of
organization/business had a written emergency preparedness plan for visitors. More specifically, this
represented 50% for lodging, 69% for attractions, and 42% for promotions. Among these
organizations/businesses, 85% noted that it was updated annually; 90% noted it to be specific to their
organization, while 97% reported that the plan was coordinated with local emergency services.

In addition, 76% of organization/business noted to have a written evacuation plan with 75%
representative of the lodging segment, 92% for attractions, and 75% for promotions. Also, 78% reported
that the plan was updated annually while 82% noted it to be specific to the business/organization. The
majority (73%) also indicated that their organization/business had a standard operating procedure (SOP)
and manual. Of which, it represented 75% for lodging, 79% for attraction, and 72% for promotion.
Among those that indicated to have a SOP and manual, 81% reported that it was updated annually and
95% noted that it was specific to their business/organization.

With respect to training, 68% indicated that their organization/business play a role in training the industry
for emergencies. More specifically, 67% of the lodging segment noted to train followed by 46% for the
promotions segment. Finally, about 89% reported that their organization/business were coordinated with
the State Office of Tourism. Again, almost all the lodging and promotion segments indicated to be
coordinated.

Project Lead Coordinator: Dr. Lori Pennington-Gray