



UNITED STATES TRAVEL AND TOURISM ADVISORY BOARD

June 17, 2015

The Honorable Penny Pritzker
Secretary of Commerce
U.S. Department of Commerce
Washington, DC 20230

Dear Madam Secretary:

This letter is the final work product from your Travel and Tourism Advisory Board's (TTAB) Technical Working Group (TWG), established to make recommendations on achieving the national goal of a best-in-class international arrivals experience. We must stress that both TTAB and TWG fully understand border security is the first and foremost task of Customs and Border Protection (CBP). Our study examines current measurement techniques on customer service and the quality of actionable data that comes from that analysis. We then outline the findings and suggested areas of opportunity for augmenting current practices. In summation there were three objectives our TWG undertook:

- 1) To provide an objective assessment on the key drivers of a traveler's perception of the international arrivals experience and decision to travel;
- 2) Development of revised surveys on performance and recommend questions to best measure the key drivers identified under objective #1; and
- 3) An executable recommendation on how best to conduct continued survey assessment against the National Goal including interval, methodology and execution. (A full deck of our analysis is attached as an addendum to this letter.)

It has been an honor to participate in this effort, and we want to specifically acknowledge the help and leadership of the co-members, Kathleen Matthews and Greg Stubblefield. The internal insight teams respectively from Universal Parks and Resorts, Marriott International, Inc. and Enterprise Holdings cannot be thanked enough for their expeditious review of current surveying product and their tireless efforts in finding models to improve the process. Of course, additional thanks must go to CBP, which took no pride of authorship in sharing their practices, and committed to being change agents on behalf of our country. The international arrival experience takes a team approach, and we also must thank American Airlines and Delta Air Lines for their participation in our efforts.

The diagnostic plan employed by the internal insight teams was conducted in two phases: 1) Discovery and 2) Research. The Discovery phase incorporated an inventory and thorough analysis of six existing sources of data (SIAT, CBP, US Travel Association, Airlines, Airports and Airports Council International), site visits to two major international gateways (Orlando International and Dulles), and conference calls with DHS Loaned Executives and Airport Authorities. The Research phase involved an in-depth interview with an exceptionally high volume global traveler, mapping the international entry process at seventeen international gateway airports, conducting inductive analysis on the existing SIAT and CBP data to determine drivers, and conducting primary research to determine expectations involving bi-coastal

focus groups and an online survey among inbound travelers that had recently experienced the international entry process.

Objective #1 - The private sector insight teams reviewed myriad statistical analysis currently touching a portion of the arrival process. Included in this product offering are studies conducted by the airports, airline companies and CBP. As expected, key takeaways from these studies were that wait times primarily drive the visitor's experience, but, perhaps not surprisingly, over 60% stated staff courtesy as potentially mitigating the impacts from those wait times. This is an important fact considering the CBP's own analysis drew a modestly positive correlation between a good entry experience and the desire to make a return trip to the United States. CBP line officers need to understand they are the nation's first line of defense, but they also serve indirectly as goodwill ambassadors of this country, and represent an important "first impression."

Objective #2 - Regardless of which methodology or survey results were studied, all answers lead back to two compelling priorities for CBP: wait times/efficient processing, and staff professionalism/courtesy. CBP's current modeling does cover the two most basic questions - guest's perception of a wait time and guest's perception of professional courtesy. The reasoning behind the use of the word "perception" is that external environmental factors can impact one's perception, so those factors need to be as controlled as possible within the study area. Also, research shows that the perception of "wait time" encompasses the entire arrival process (gate, walk time, processing, baggage and exit), and not solely time spent in primary processing.

Primary research suggests an additional question would provide insight by gauging a guest's perception of 'friendliness,' an important driver of top box scores. Additionally, an overall experience question should be used as a benchmark to track progress over time. The current CBP survey contains a summary question 'Considering your entry process experience, do you feel welcomed to the U.S.?' This is itself a driver of satisfaction, but an unreliable measure given that 'welcoming' is a higher order behavior in the overall mix of experience drivers.

Objective #3 – TWG believes we can further our collective national goal of reaching best-in-class service levels on international arrivals by adopting a series of recommendations arising from the results of our assessment and analysis. We acknowledge that the current CBP survey is a comprehensive gauge on the arrival experience, but we believe it can be greatly enhanced by:

- (a) Incorporating the suggested questions regarding perception of "friendliness" and perception of overall experience into the CBP survey (please see Attachment A hereto);
- (b) Increasing the sample size to gather a significantly larger sample of international arrivals' opinions, by:
 - (i) Incorporating questions from the CBP survey (five or six questions focused on perception of wait time, perception of professional courtesy, perception of friendliness and overall experience) into the existing Commerce Dept. SIAT survey, thereby achieving a efficient, collaborative use of federal resources;
 - (ii) Funding to expand the SIAT to enhance its role as a data source for cross-agency deliverables including, but not limited to, tracking CBP-related customer perceptions; quantifying country-specific visitation to individual US destinations; and generating data in support of federal balance of trade calculations.
 - (iii) Funding to allow the CBP survey to be conducted at more airports (of various sizes measured by total international arrivals)
 - (iv) Seek cooperation from partners in the private sector (airports, airlines, U.S. Travel, etc.), as well as Brand USA, to incorporate those identical survey questions into their own guest satisfaction practices, and share the results with CBP.
- (c) Evaluate technology solutions to reduce costs of survey administration and analysis.

We believe the above recommendations will provide a very robust assessment of our progress on the national goal. We envision a national scorecard measuring wait time, courtesy, friendliness, and overall experience criteria, as well as individual post assessments which should be incorporated into the existing CBP Port Action Plans. These measurements and assessments will assist in developing action plans and remediation to continuously improve our overall international arrival satisfaction. We would envision a staff liaison from CBP and DOC be assigned to monitor implementation of the surveys and ensure results become change mandates to individual port action plans.

Madam Secretary, it has been a privilege to lead this effort, and I greatly appreciate the contributions of the entire TWG team.

Sincerely,

A handwritten signature in black ink, appearing to read 'John Sprouls', with a stylized flourish at the end.

John Sprouls
Chairman
TTAB Technical Working Group

A handwritten signature in black ink, appearing to read 'Sam Gilliland', with a stylized flourish at the end.

Sam Gilliland
Chairman
Travel & Tourism
Advisory Board

Attachment A: CBP SURVEY RECOMMENDATIONS

We believe the combination of questions noted below provides the most accurate gauge of the international traveler's border experience. As noted, some already exist in the current CBP survey. Also, we have footnoted those that should, at a minimum, be added to the SIAT survey, and any private sector partner surveys as recommended.

To what degree do you agree or disagree with the following that apply to the CBP Officer who processed you at the inspection booth?

- Processed your entry efficiently (measures satisfaction with minimum efficiency requirements)^{1,2}
- Was professional (is a proxy measure for fairness and respect and basic courtesy)^{1,2}
- Was welcoming (is a driver of better than average experience)^{1,2}
- Was friendly (is a driver of better than average experience, i.e. the everyday basic pleasantries)²

To what extent do you agree or disagree with the following statements on the overall inspection area?

- The signs were clear and informative¹
- The layout through the entry process was clear and easy to follow¹
- Officials were helpful in guiding travelers through the processing area¹
(all three of these measure MUST BE basic communication and assistance)

How would you characterize your wait time? (Short, Reasonable, Long): (measures the extent to which they are exceeding wait time expectations, a key driver of better than average experience)^{1,2}

On a five point scale from Excellent to Poor, how would you rate your entry experience overall? (new overall measure to benchmark improvement over time)²

Considering your entry process experience, do you feel welcomed to the U.S.?¹

¹ CBP Survey

² Recommend Adding to SIAT Survey