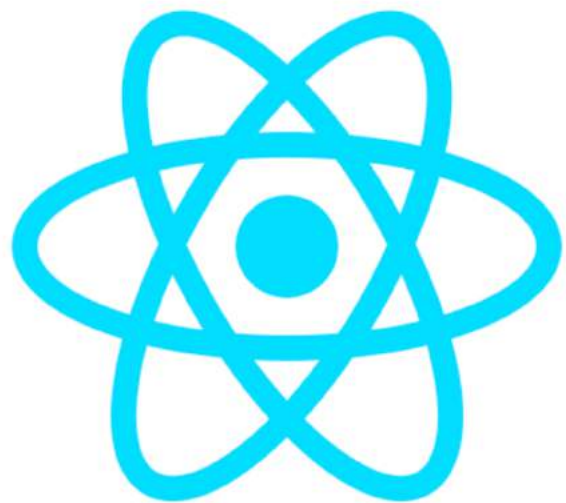


# **DMO Action Planning in Response to Covid 2020**

## **A Solutions Based Approach to Recovery**



**React**



**Rethink**



**Recover**

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# Agenda

- The COVID Crisis: An Existential Threat
- Situational Analysis
- Phase One: React
- Phase Two: Rethink
- Phase Three: Recovery
- Way Forward and Next Steps

Everything **before** a crisis will be seen as  
an over-reaction

Everything **after** a crisis will be seen as  
inadequate

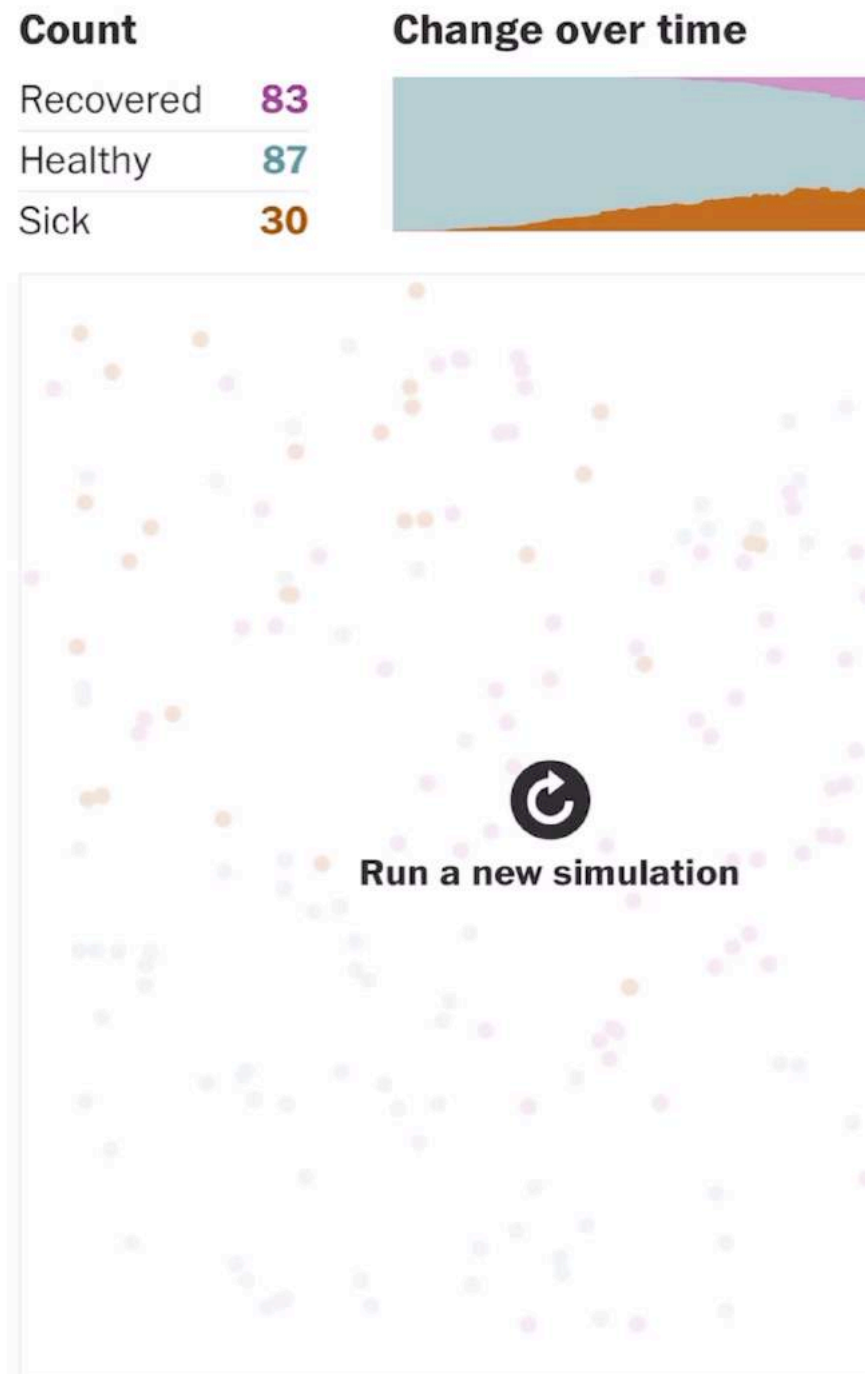


# A Crisis Unlike Any Other

- There has never been a crisis like this before
- Within a month this went from being a Chinese Market problem to a Global Shutdown of the entire industry
- Our Sector has effectively shut down
- WTTC projects over 75 Million Jobs lost
- Financial losses to exceed \$100 Billion
- Consumer Spending and Traveller Confidence eroded to an all time low



# Stopping all Travel has become Essential



BRING  
ME!

13



**Sensō-ji Temple — Tokyo, Japan**  
**April 2018**

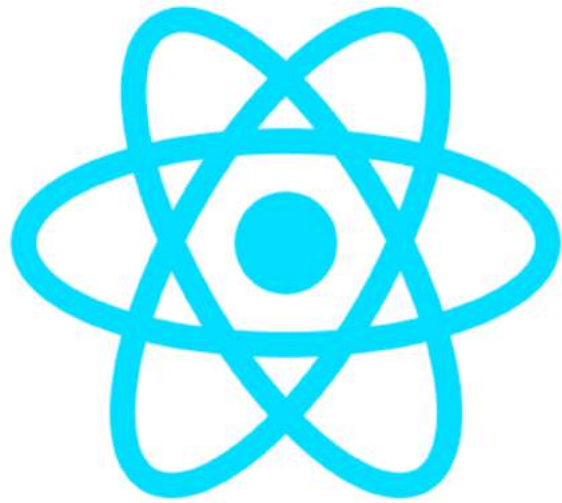


# Accepting Reality

- This is an **Existential Crisis**
- This will **not** end quickly or have a defined ending
- Travel will fundamentally change: The Sector will not **resume** as it was before
- Every Destination is now a **Start Up**
- Airlines, tour operators and visitors will **prioritize Destinations** with a plan in place **before** recovery, not creating one at the time

# Self Destructive Behaviour

- Wait and See
- It's a Global problem
- Lets Market the Destination with our Agencies
- Uninformed Responses
- Process and Procedure during a crisis



**React**



**Rethink**



**Recover**

**The Biggest Question is  
When?**



# **Understanding Phase Shift**

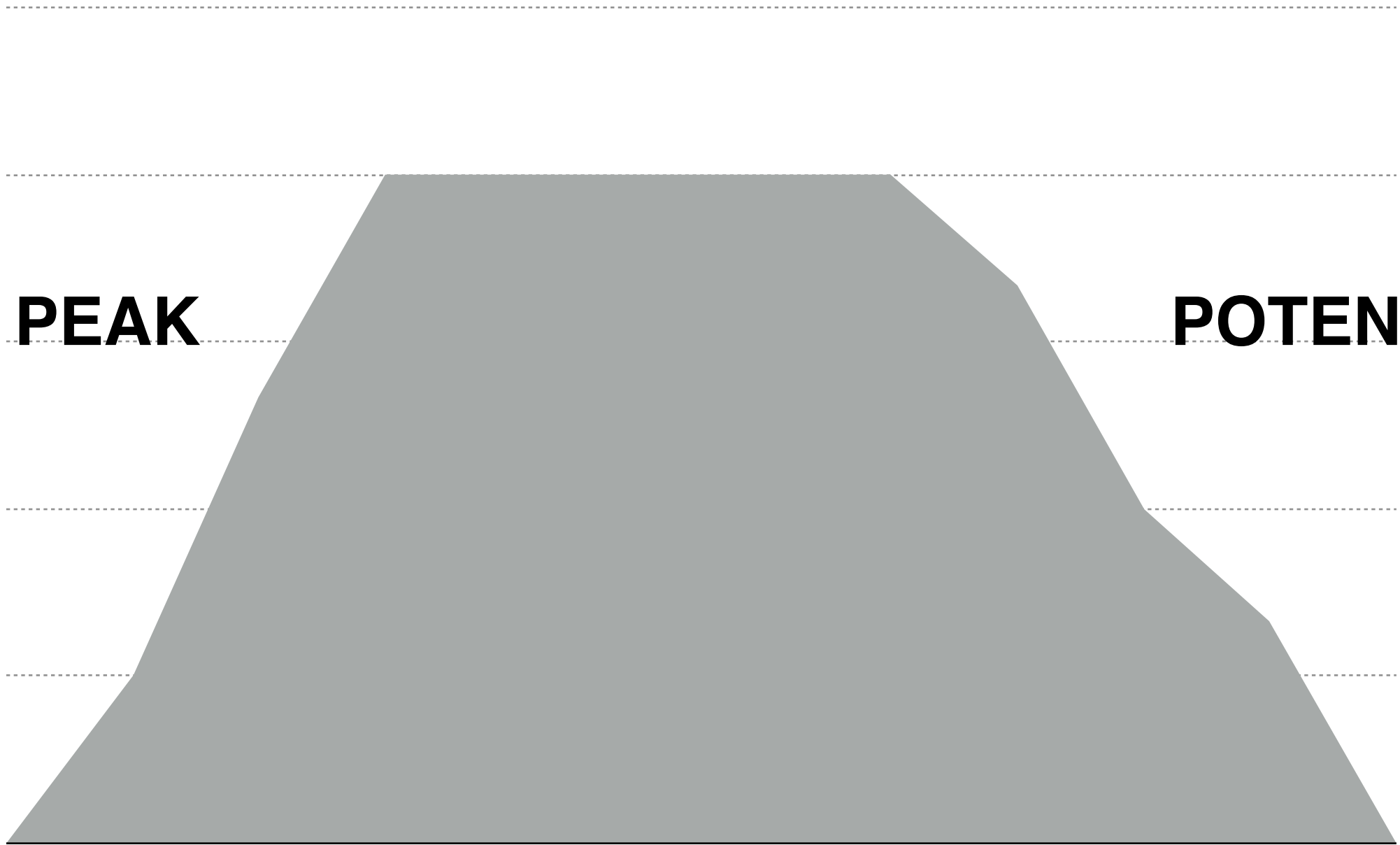
# PLATEAU

**PEAK**

**POTENTIAL**

Jan Feb March April May June July Aug Sep Oct Nov Dec

ESTIMATES



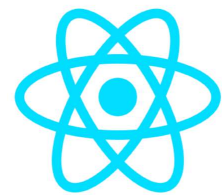
# PLATEAU

**REACT**

**RECOVER**

**PEAK**

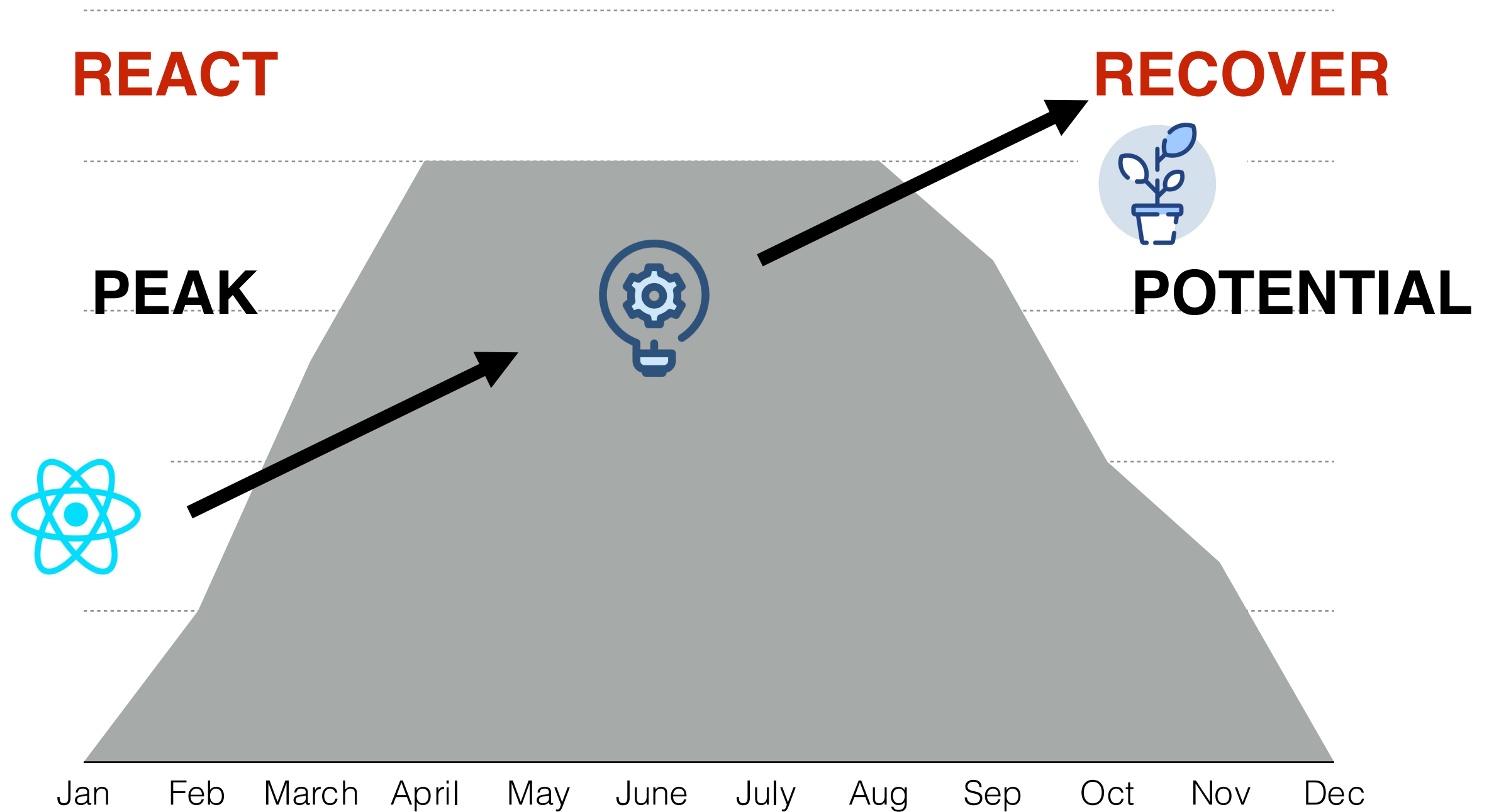
**POTENTIAL**



Jan Feb March April May June July Aug Sep Oct Nov Dec

ESTIMATES

# PLATEAU



ESTIMATES



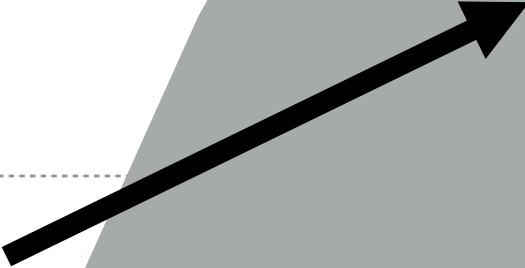
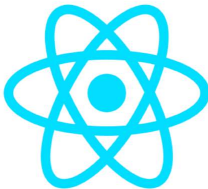
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**REACT**

**RECOVER**

**PEAK**

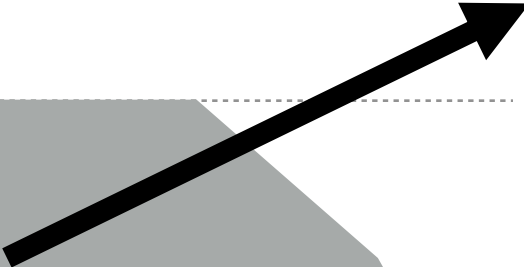
**POTENTIAL**



Phase Shift

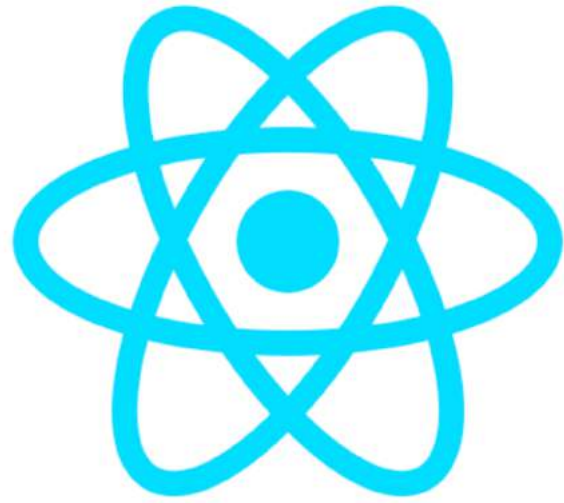


Phase Shift



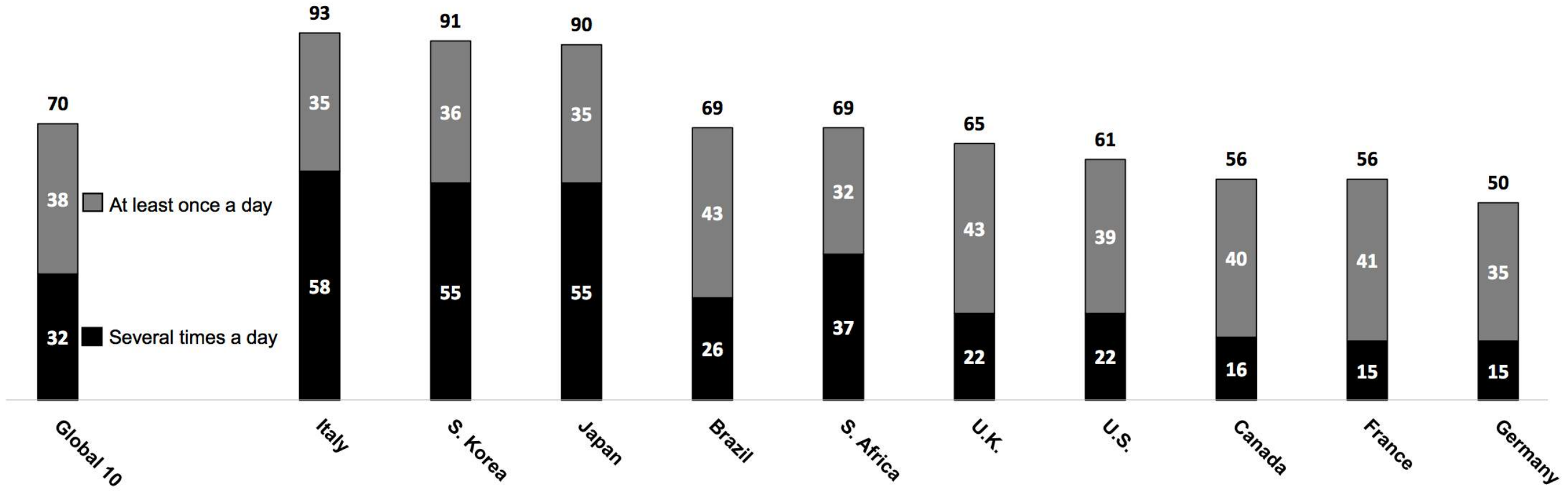
Jan Feb March April May June July Aug Sep Oct Nov Dec

ESTIMATES



**REACT**

# Everyone is Looking for Information Online



Edelman Trust Barometer

# Info

- Providing **Credible Information** to Trade, Prospective Travellers and Government is your Main Asset
- **Fact Check** and Vet everything
- Eliminate the **FOAF** factor
- Identify Accurate **Sources**
- Practice **Ephemeral** Messaging
- Seek **Allies** in Trade and Media



# Credibility is Trust

I worry that there is **a lot of fake news** and false information being spread about the virus

⊥

**74%**

---

It has been **difficult for me to find reliable and trustworthy information** about the virus and its effects

⊥

**45%**

---

We need to hear **more from scientists** and less from politicians

⊥

**85%**

---

# Resources

- **Gain Trust and Inspire Confidence:**
- Create a **Communication Plan** and Structure with policies
- Create **Official Channels** of communication not consumer channels and use associations for dissemination
- Create an **Online Resource Hub** and link to trusted partners, don't reinvent the wheel
- Use **Business Surveys** to identify challenges and opportunities

# Never

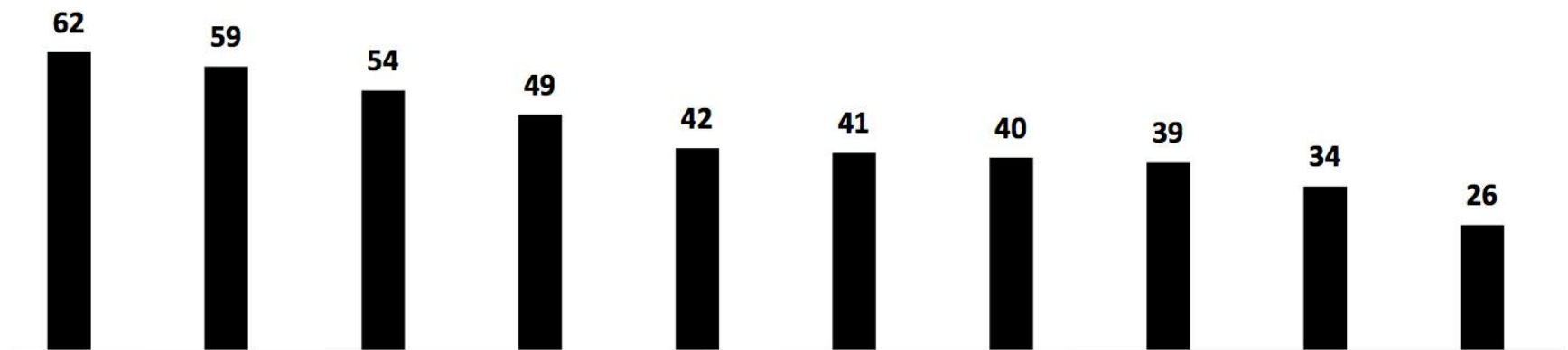
- Turn your Stakeholders into **Enemies**
- **Minimize** Impacts
- Create **False Hope**
- Confirm or Deny without **Verification**
- **Confront** Media or the Negatively impacted
- Take **Reactive Action** that will permanently impact your future

# Public Support for PPP

	Global 10	Germany	Brazil	Italy	S. Africa	Canada	U.S.	Japan	U.K.	France	S. Korea
Business alone	5	4	6	3	7	3	8	7	2	4	5
Government alone	20	11	19	21	15	22	13	15	23	17	42

Government and business  
working together  
as a team

**45%**



Edelman Trust Index

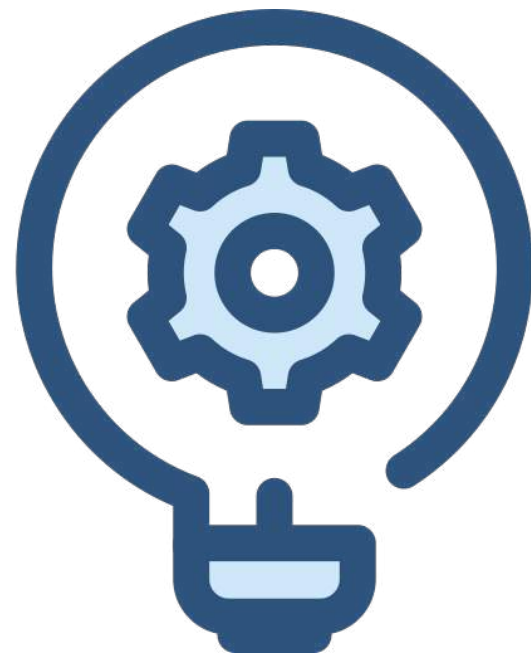


# Work Together

- **Partnerships** between Government and Trade are now essential
- **Accommodation** and **Transport** resources will be essential for public health
- **Hospitality workers** have a potential role
- These partnerships can be progressed into **stimulus and recovery** support

# React To Do List

- Start **Planning** Now
- Aggregate Manage and Share **Credible Information**
- Communicate Credibility to **Trade, Future Travellers and Government**
- Build **PPP Relationships** and Community



**RETHINK**

# Be Prepared to Recover

- Carry out **Risk and Threat** assessments
- Carry out **Pre-Covid Market Assessments**
- Prioritize **Positive Content Aggregation**
- Make your Team ready for **Phase Shift**

# Protect your Assets

- Streamline your Team
- Create Core Staffing
- Stop Selling and Redistribute Budgets
- Create a Financial War Chest



**Use Content to Retain  
Engagement:**

**Don't do Business  
But**

**Don't be Invisible**

# Depressed Demoralized and Dreaming

- What do you want to do **AFTER** the Pandemic?
- 59% Go to a Restaurant
- 51% Go Shopping
- 45% Travel

# 22 ways to leave home without actually leaving the couch, from virtual zoo exhibits to museum gallery tours

Darcy Schild Mar 17, 2020, 6:46 PM



**Vanity Fair**

Yesterday at 6:00 PM · 🌐

Fiona the hippo (and other friends) are ready to provide entertainment to home-bound folks.



VANITYFAIR.COM

**Need Something to Stream? Zoos Are Going Digital During Quarantine**

👍❤️ 168

26 comments 72 shares 🌐

👍 Like

💬 Comment

➦ Share

# Virtuality

- Stay on Travellers Minds
- A literal captive audience is dreaming
- Give them Experiential Content
- Live Stream and Travel Channels as Priority
- Social is overloaded with Negativity
- Stay in Touch by Retention

**See** it Now

**Experience** it Soon...

#TravelTomorrow

# Threats and Risk

- Which parts of your organization and which suppliers may not be sustainable?
- Which air carriers are at financial risk and may not return or will delay return?
- How many of your stakeholders can survive without stimulus? Who is at most risk?
- Which Operators and channels may not return?
- Which market segments may not be willing or able to travel?

# Re-Segment

- Identify priority travellers: Those most resilient to return to travel and how they will differ from those targets in 2019
- Which segments may no longer be viable through economic impact
- Which new segments could help rebuild business



# Re-Strategize

- Identify priority source markets; and how those source markets will be determined by air carriers and tour operators
- Prioritize operator channels and which will be the most resilient
- Prioritize airline partners- which will be the first to return and what will restrict others
- Review tourism products and experiences: Which icons will remain and which experiences will support recovery first and fastest

# Digital Always

- More than ever Strategies need to be Digital First
- The Isolation period has made new demographics digital natives
- Simplest and most Cost Effective Channel
- Trust has been eroded and needs to be won back

**The Volume Model will  
be Slow to Recover**

# Business at Risk

- Mass Tourism Operators
- Cruises
- Charter Aviation
- Many Small Operators
- Rate no Longer drives Occupancy

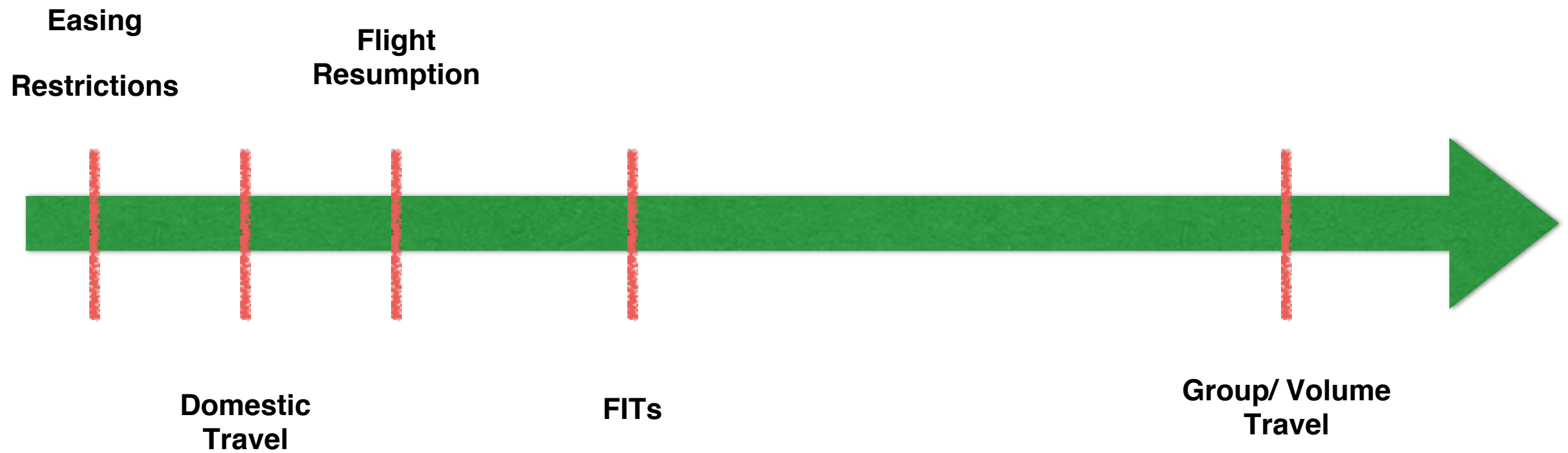
# Tourism Triage

- Focus on retaining **Brand Awareness** over business
- Focus **First Phase** on sectors that can and will come back (Hikers over Cruise Passengers)
- Take stock of your products- which are going to work for you during Recovery?
- Some products may be viewed through the prism of pandemic: Buffets, Cruise Ships, AirBnB

# Phase Shift Action Plans

- Phase Indicators of Recovery:
- Ease of **Restrictions**
- Resumption of **Domestic Travel**
- Resumption of **Flights**
- Resumption of **Independent Travel**

# Time Lines



# Recovery To Do List

- Streamline your team
- Retain Engagement now to Market Recovery in future
- Ensure you justify your role and budgets
- Re- Strategize and Re-Segment
- Plan to Re-engage with Airlines, Operators and Partners
- Agree your Indicators for Phase Shift





**RECOVER**

# Recovery Split

- **DMOs:** Marketing and/or Management
- **Recovery** will represent two important fronts:
- **Re-engagement** with the Trade: Support, Lobbying, Negotiations
- **Re-entry** to Markets: Strategy, Spend and Focus

# Funding Recovery

- Create a **Budgeted Plan**: Identify at least One Sales Driven Campaign and Convert it to a Recovery Strategy
- Economic **Support and Stimulus** will be vital and lobbying to Treasuries is Critical
- Have an Economic recovery plan with **Yield Management**- a recovery race to the bottom will damage the future

# The New Age of **If Only**...

- Consider past decisions, policies and plans that were difficult and problematic and **if only** things were different
- Consider **markets** that were not performing
- **Products** that required and were not receiving volume
- **Over Touristed** regions and products
- We can now **Re-set and Re-think**

# Recovery To Do List

- Increase focus on Destination Management
- Develop a Complete Recovery Strategy
- Re-engagement Strategy with Partners
- Build Market Confidence
- Market to Phased Segments

# Strategy is Essential

- Action is needed today
- This is beyond PR or Marketing
- Destinations that will recover the fastest are developing plans now for execution of strategies as and when COVID-19 is contained
- A three phase **React Rethink Recover** Strategic Plan is essential

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