

DESTINATION
THINK
DESTINATION

F O R U M



RODNEY



WILLIAM



DAVID

UNCERTAIN TIMES



COVID-19 support group for DMOs - Destination Think

Private group

About

Discussion

Announcements

Members

Events

Photos

Files

Watch Party

Search this group

Shortcuts

COVID-19 support grou...



Joined

Notifications

Share

More



Write Post



Photo/Video



Live Video



More



Write something...



Photo/Video



Watch Party



Tag Friends



NEW ACTIVITY



Destination Think shared a link.

Admin · 18 hrs

GROUP BY



Destination Think

7,470 like this

INVITE MEMBERS

+ Enter name or email address...

MEMBERS

699 members



TODAY

STRATEGY

TOMORROW

COMMS

DAY AFTER

INDUSTRY



JOIN THE COVID-19 NETWORK

SUPPORT INITIATIVE

destinationthink.com/jointhenetwork

Tools and support you need to guide your destination through the COVID-19 pandemic.

- Weekly insights and data
- Planning resources
- Communications guidance and toolkits
- Playbooks for industry support
- And peer support groups

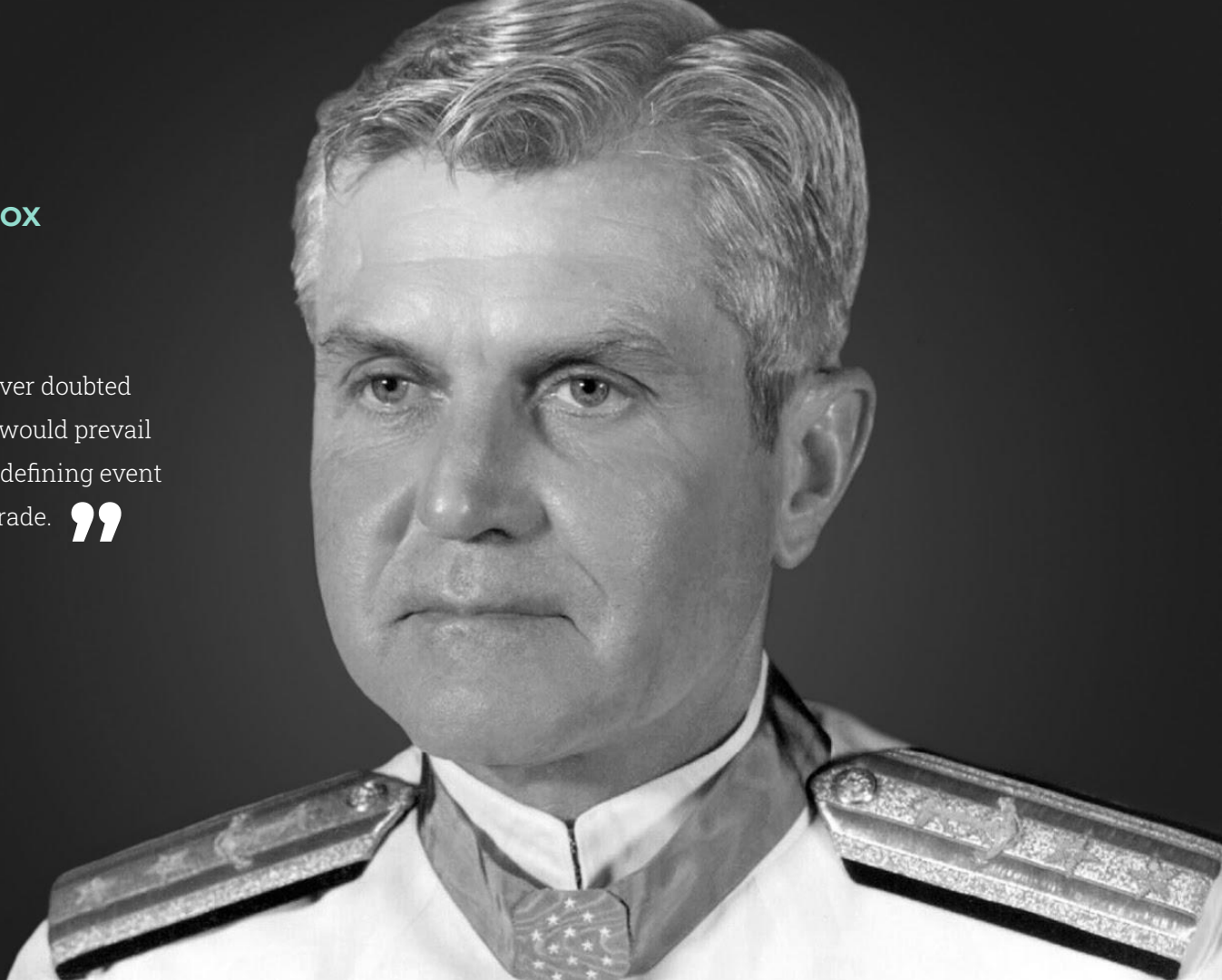
STRATEGY IN UNCERTAIN TIMES

EMBRACE THE STOCKDALE PARADOX

“

I never lost faith in the end of the story. I never doubted not only that I would get out, but also that I would prevail in the end and turn the experience into the defining event of my life which in retrospect, I would not trade. ”

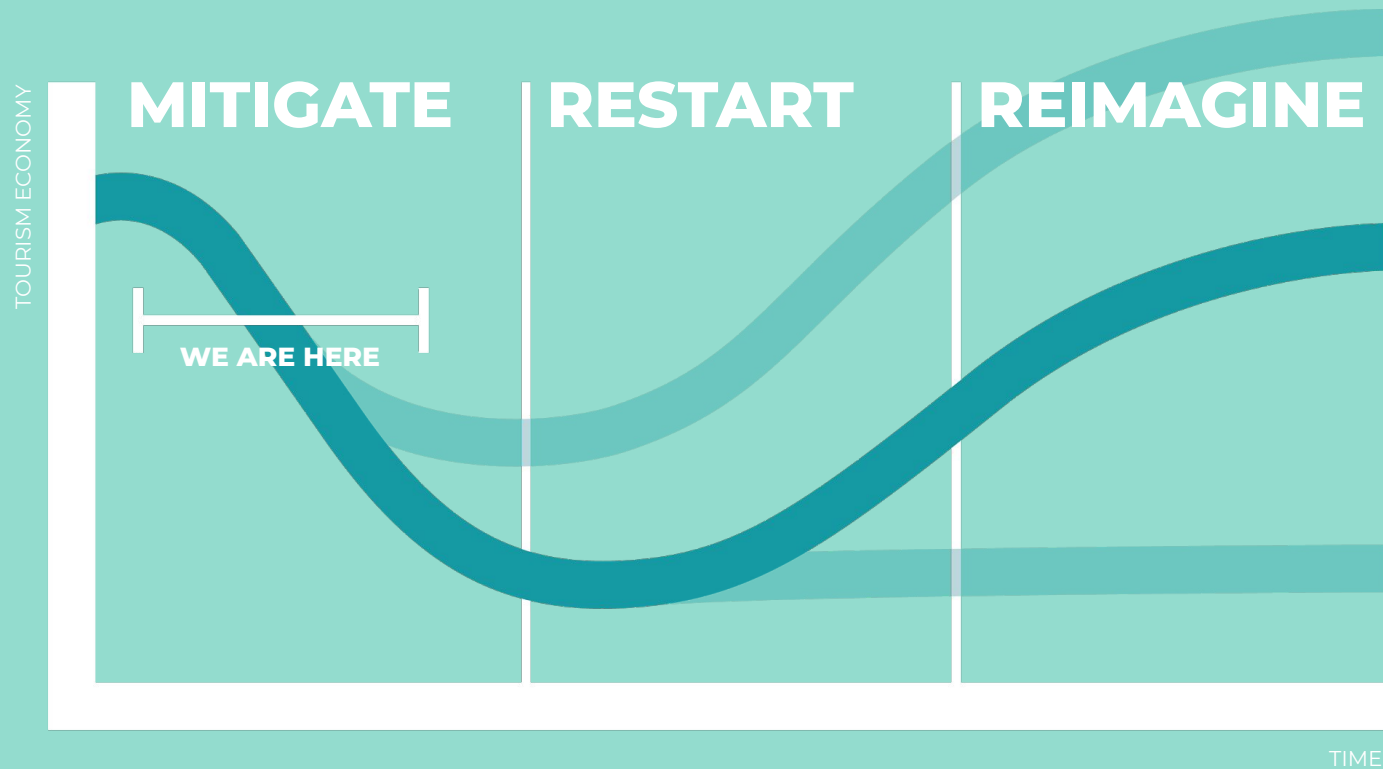
James Stockdale

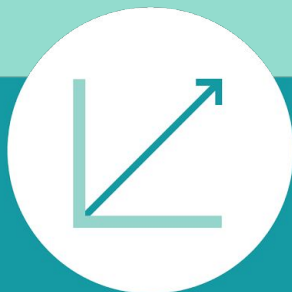


THIS IS YOUR CHANCE TO STEP UP AND MAKE A DIFFERENCE.

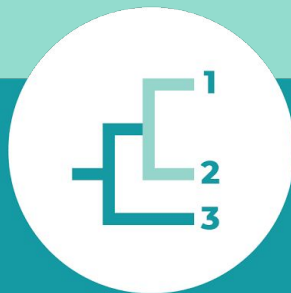
Don't be afraid
Rise up to the challenge
You have nothing to lose



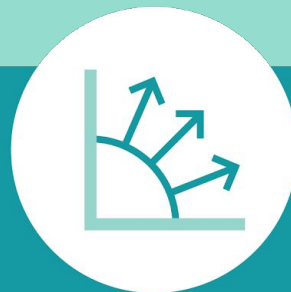




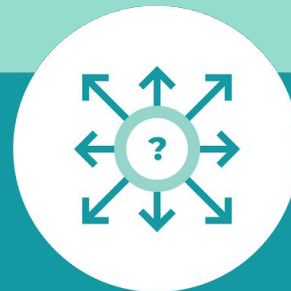
LEVEL 1
CLEAR ENOUGH FUTURE
Single view of the future



LEVEL 2
ALTERNATIVE FUTURES
Limited set of possible
future outcomes, one of
which will occur

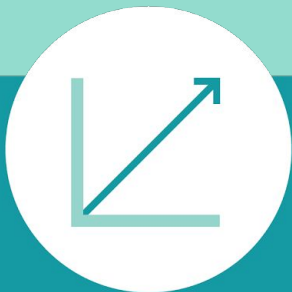


LEVEL 3
RANGE OF FUTURES
Range of possible
future outcomes

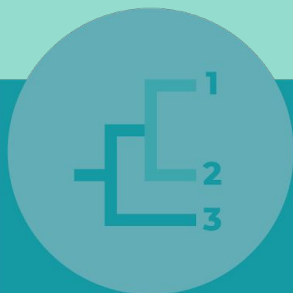


LEVEL 4
TRUE UNCERTAINTY
Not even a range of
possible outcomes

**MOST ARE
RESPONDING
LIKE THIS**



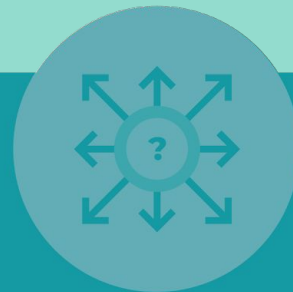
**LEVEL 1
CLEAR ENOUGH FUTURE**



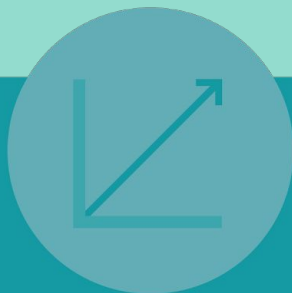
**LEVEL 2
ALTERNATIVE FUTURES**



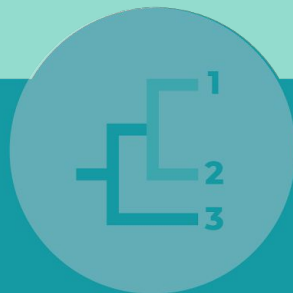
**LEVEL 3
RANGE OF FUTURES**



**LEVEL 4
TRUE UNCERTAINTY**



LEVEL 1
CLEAR ENOUGH FUTURE
Single view of the future

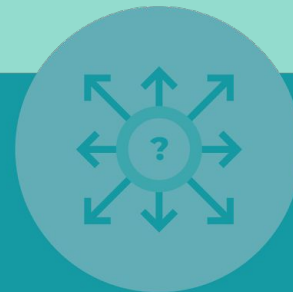


LEVEL 2
ALTERNATIVE FUTURES
Limited set of possible
future outcomes, one of
which will occur

**WE SHOULD BE
RESPONDING
LIKE THIS**



LEVEL 3
RANGE OF FUTURES

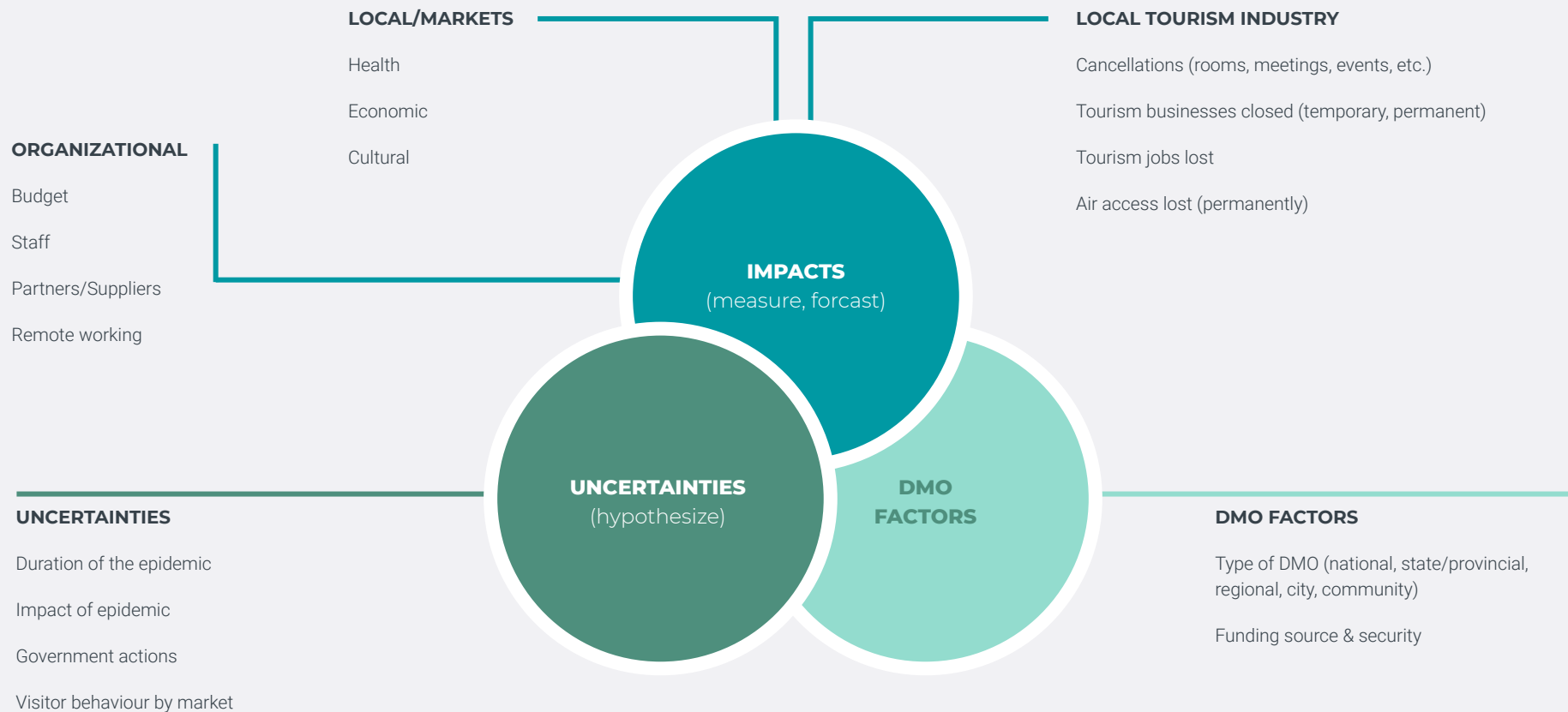


LEVEL 4
TRUE UNCERTAINTY
Not even a range of
possible outcomes



Support Statistics!

In times of uncertainties – Data matters!



MITIGATION PHASE

RESTRICTION SCENARIOS



PLACES WILL MOVE BACK AND FORTH THROUGH PHASES



QUESTIONS TO ANSWER IN THE ANALYSIS *FOR EACH PHASE*

When do we trigger a change in
messaging/markets?

What experiences are you offering?

Who is the right visitor for this phase?

How do we reach them?

What is the right message?

How do we support industry who (re)open?

DATA, RESEARCH AND INSIGHTS

State of industry

Seasonality

Budget

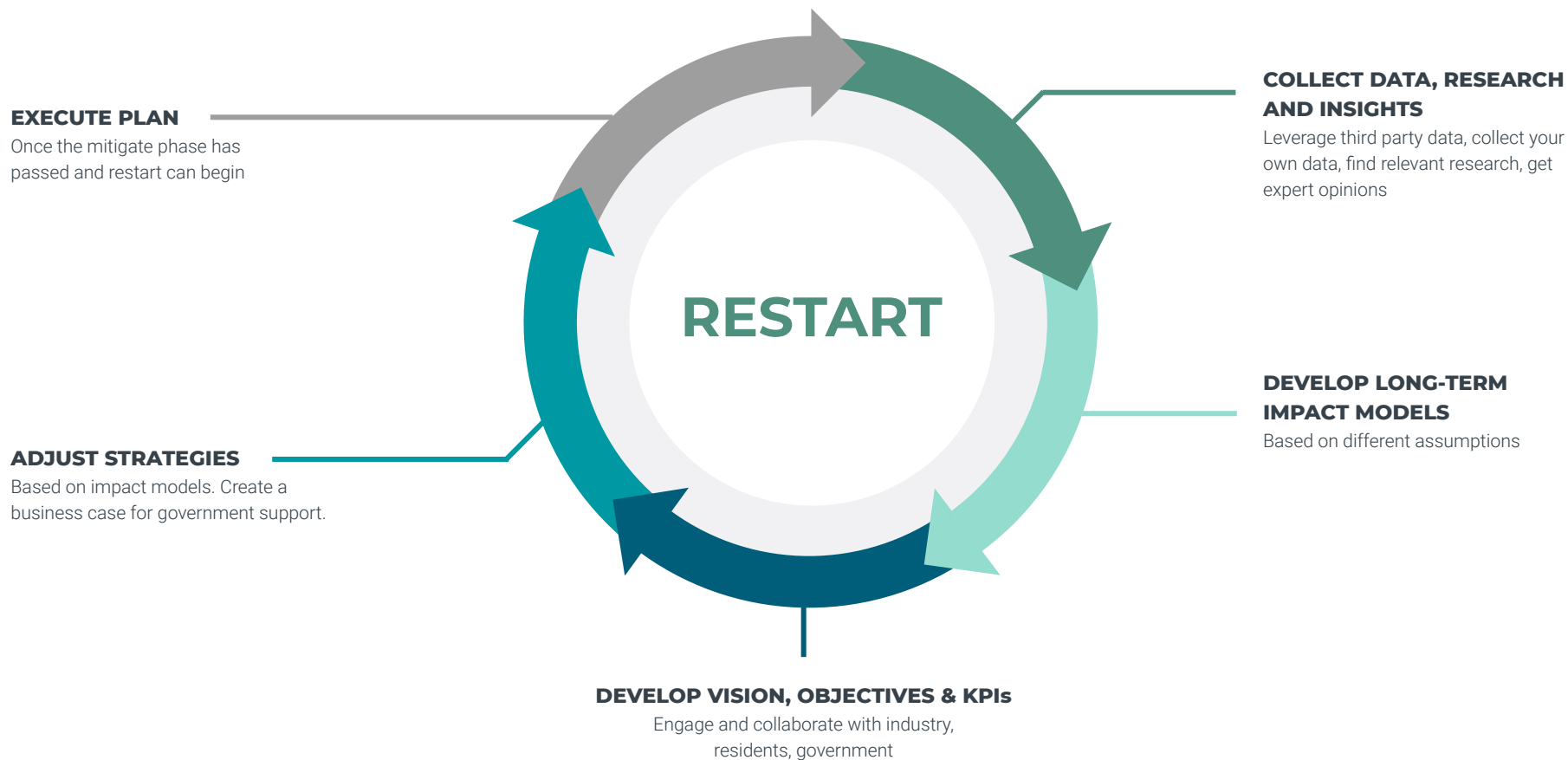
State of markets
(economic/cultural/political/emotional)

Reputation

Competition

Government support options

RESTART/REIMAGINE PHASE



QUESTIONS TO ANSWER FOR A RESTART

What will the state of industry be?

What's the business case for support?

What resources will be available?

What partnerships are needed?

What experiences are you offering and how are they different?

How fast should you go?

Is your brand/positioning still relevant?

What strategic shifts do you need?

DATA, RESEARCH AND INSIGHTS

State of industry (gap analysis)

Seasonality

Budget

State of markets
(economic/cultural/political/emotional)

Reputation

Competition

Government support options

CREATIVITY

ACTION

STRATEGY

INSIGHTS

**COLLECT
DATA
AND
ANALYSIS**

ADVANCE QUESTIONS

QUESTION

How do we plan for
human fear of traveling
after COVID-19?

QUESTION

How do we determine the optimum number of scenarios to be developed based on current information?

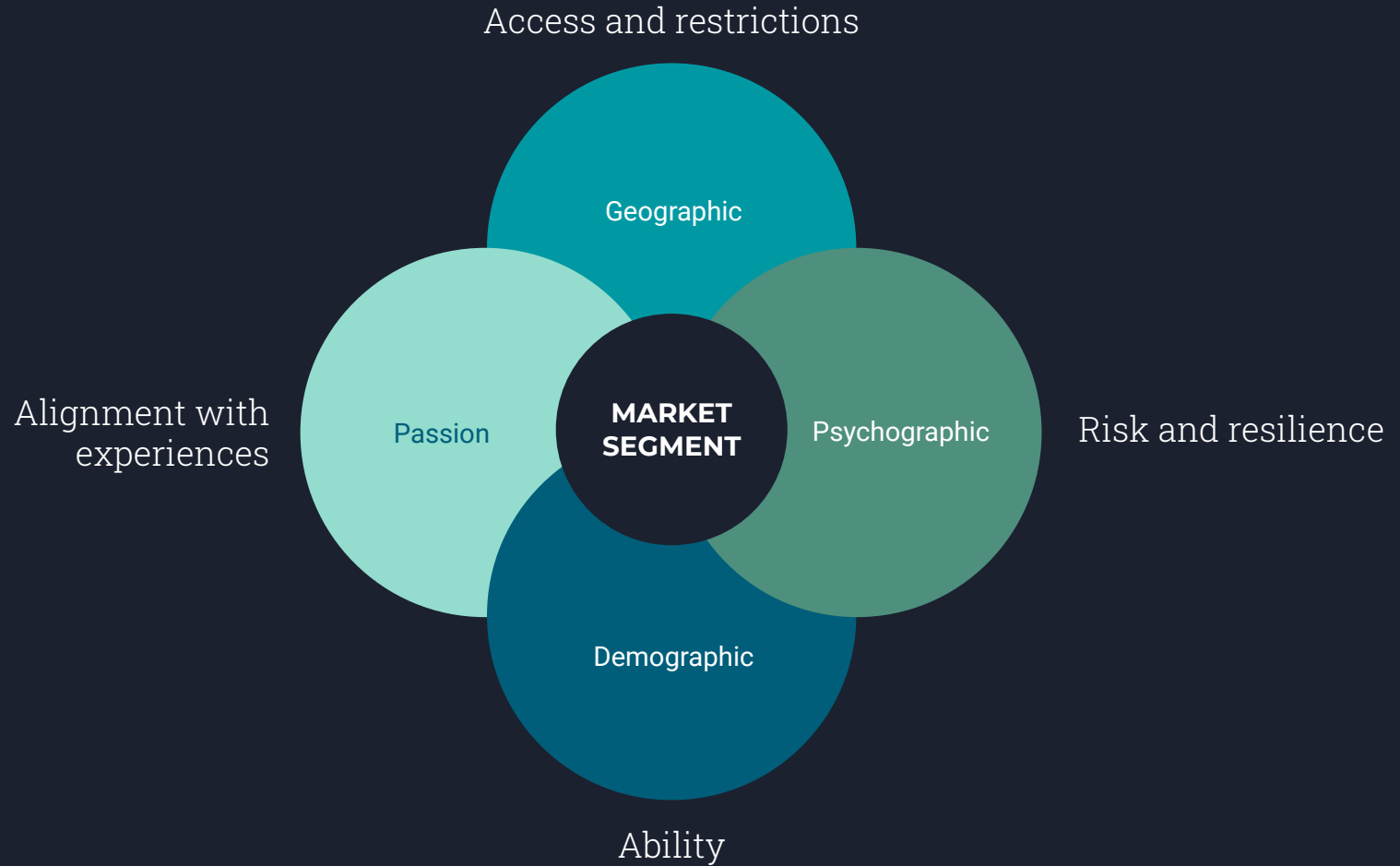
QUESTION

In order, please highlight which outbound regions will recover first and see travel bounce back and which regions will they visit?

RESTRICTION SCENARIOS



PLACES WILL MOVE BACK AND FORTH THROUGH PHASES



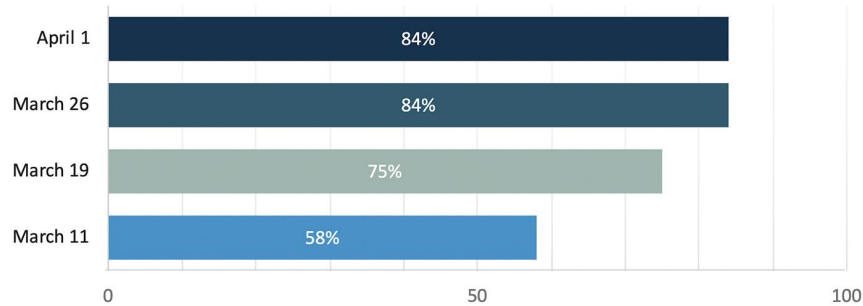
QUESTION

What are your thoughts around doing segmentation quant and qual research at this time? Would it just capture a moment in time?

TRENDS INSTEAD OF SNAPSHOTS

IMPACT ON TRAVEL PLANS

Travelers Planning To Change Upcoming Travel Plans Due To COVID-19 Comparison



Travel Sentiment Study Wave 4

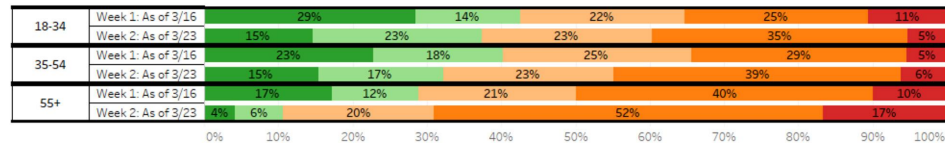
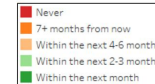
Longwoods | miles
INTERNATIONAL PARTNERSHIP

TRENDS INSTEAD OF SNAPSHOTS

VISIT
PHILADELPHIA®



Thinking about the state of the coronavirus outbreak today, when would you feel comfortable vacationing or traveling for leisure to Philadelphia?
Philly, NYC and DC DMA residents, as of March 23



- 43% of residents from nearby DMAs would feel comfortable waiting 7 months from now to travel to Philadelphia, up from 31% last week.
 - For respondents aged 55 and up, this proportion is even higher (52%). This age group saw the largest increase in time over last week across all DMAs.
 - 50% of travelers in the general population want to wait 7 months or more, especially those 55+ (56%).
- Philly DMA saw the largest increase in travelers who would wait 7 months from now, almost doubling to 37% from 19% last week.
 - However, this DMA would still feel comfortable traveling sooner than NYC or DC, with 17% of travelers saying they would within the next month compared to 9% in NYC and 6% in DC.

BEHAVIOUR VS. INTENT

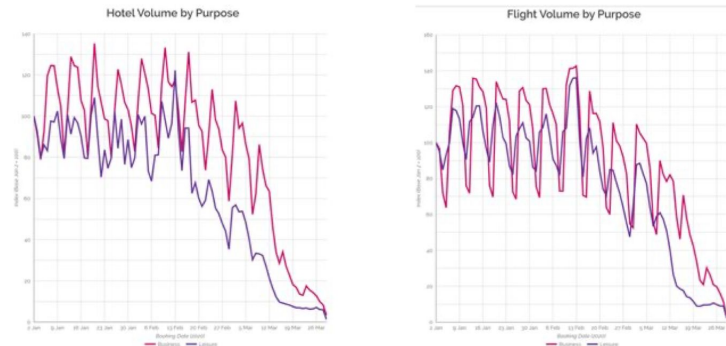
VISITSCOTLAND COVID-19 UPDATE

DIGITAL INSIGHTS - THIRD PARTY

ADARA

ADARA provide insights to accommodation and flight search patterns, and also booking behaviours. The trends below are reflective of visitScotland.com patterns, with a rapid decrease in activity over February / March.

VisitScotland will monitor ADARA booking window data, which extends up to 91+ days in advance of departure. This will help inform timings for future marketing activity, when visitors are ready to consider travel once more.



QUESTION

Is it possible to forecast the lifting of restrictions for both the domestic and international market places?

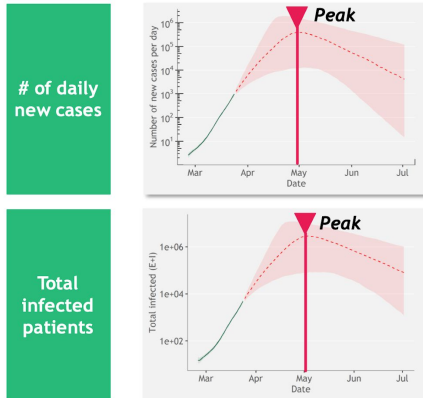
USE CREDIBLE PROJECTIONS

Canada Epidemic scenarios | Current projection of cases and potential new measures to be taken by public authorities



As of March 25th

Current projections for new cases and total infected patients



Source: John Hopkins University (Coronavirus Resource Center), BCG Analysis

Estimated key dates of COVID-19 crisis

Lockdown start date (actual or potential)

- 10th death occurred on March 30th
- Potential lockdown could start as soon as W4 March
 - While national lockdown unlikely, many provinces have already begun restricting movement

Peak date

- Peak of new cases expected in W1 May

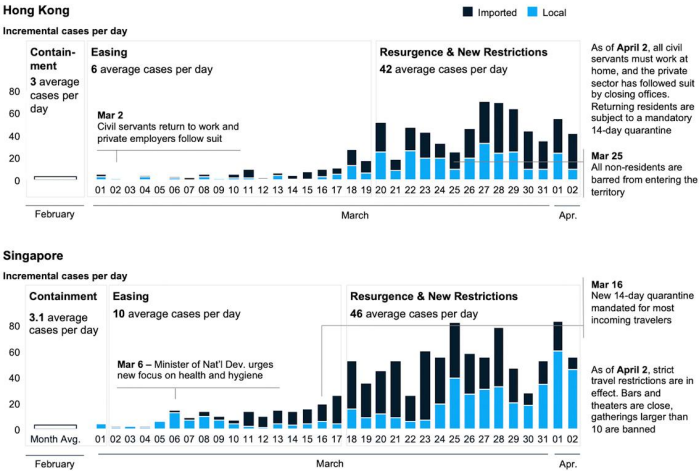
Lockdown end date (actual or potential)

- We expect lockdown to be lifted between W4 June and W3 July

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LEARN FROM OTHER PLACES

D: Asian jurisdictions have restarted economy, containing local transmission, though travel related transmissions persist



Source: Hong Kong Government Data Repository, Singapore Ministry of Health, Taiwan Center for Disease Control, press search

Current as of April 3, 2020

Some Asian jurisdictions have been able to restart their economies with limited local transmission

Imported cases reflect a high fraction of the total, which may drive longer imposition of travel restrictions relative to other public health measures

McKinsey & Company

LOOK FOR POLITICAL SIGNALS

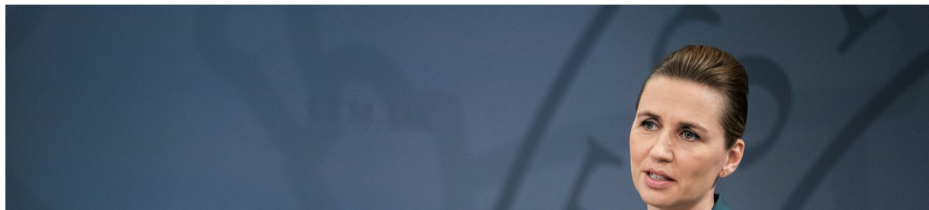
WORLD NEWS MARCH 30, 2020 / 8:55 AM / 7 DAYS AGO

Denmark eyes gradual reopening after Easter if coronavirus numbers stabilize

3 MIN READ

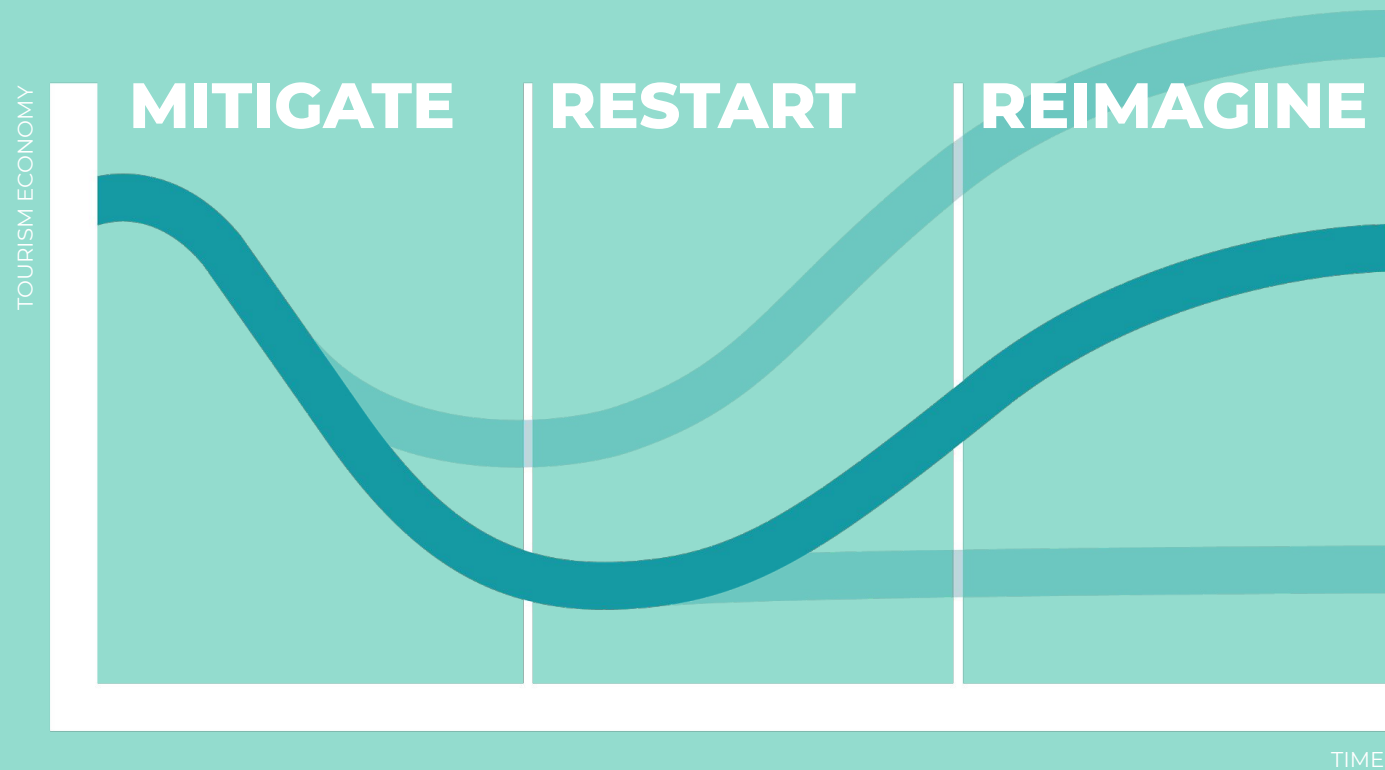


COPENHAGEN (Reuters) - Denmark may gradually lift a lockdown after Easter if the numbers of coronavirus cases and deaths remain stable, Prime Minister Mette Frederiksen said on Monday.

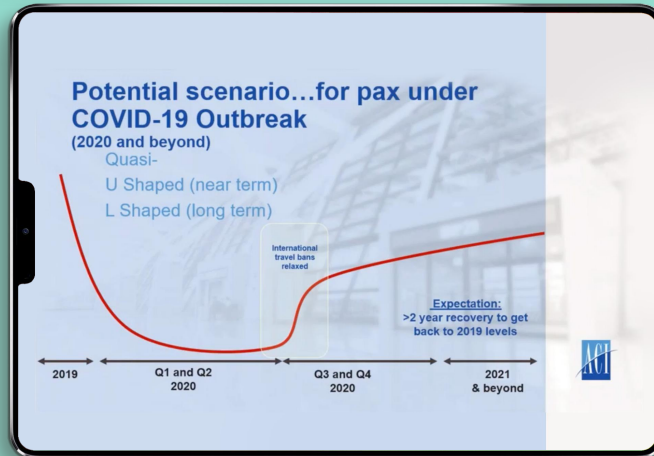
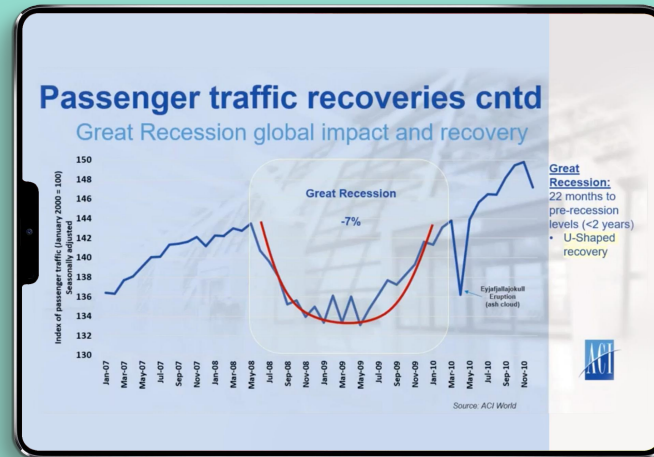
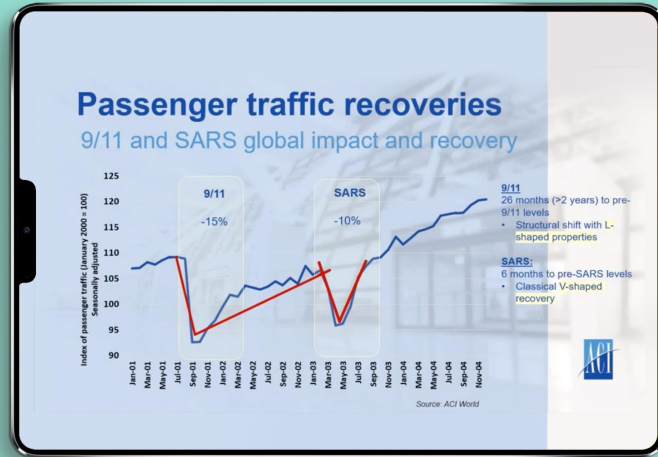


QUESTION

What are the market signals that a destination can identify, for the situation coming back to (the new) normal?



LESSONS FROM THE PAST



QUESTION

How do we engage boards and stakeholders in planning when their worlds are falling apart?

FOUR KEY TAKEAWAYS

- 1) You have to create space from the day-to-day
- 2) Create a data framework and start collecting
- 3) Develop plans based on scenarios
- 4) Be ready to execute



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LET'S STAY IN THIS TOGETHER

Please make yourself feel welcome and say hello to our COVID-19 Facebook support group if you haven't already.
www.facebook.com/groups/DTtravelsupport



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