

Actions for Destination Marketers to Navigate in a COVID-19 World





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In partnership with



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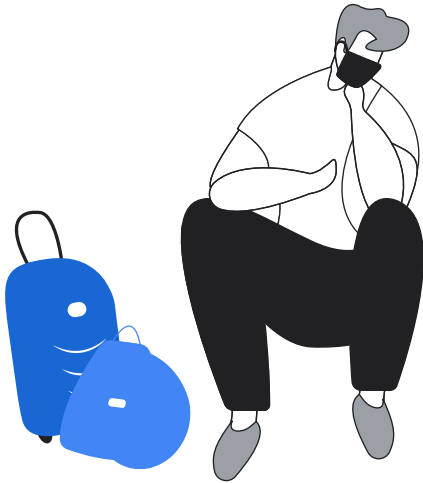
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The COVID-19 pandemic has hugely impacted the global travel industry. Airline and hotel bookings are down more than 90% worldwide, and cruise ships are under total no-sail orders. In April 2020, 91% of the world's population lived in countries with restrictions on travelers arriving from other countries, and 39% lived in countries whose borders were closed entirely. Little had changed by August to improve the situation.

This has proven to be an extremely challenging time for destination marketing organizations (DMOs) – which collectively includes national tourism organizations (NTOs), whose mission is to generate demand for tourism from international markets by building their destinations' brands and raising traveler awareness about their respective destination offerings. In ordinary times, DMOs operate with a relatively high degree of certainty; planning is an annual process, setting budgets is a formality, traveler behavior is understood, and marketing plans are clear and in place.

That's all changed. Now, DMOs must apply their resources to understanding COVID-19's impact on travel, now and in the future. How have consumers' attitudes toward travel changed in response to the pandemic? When will they begin to seek out travel opportunities again? Where

will they want to go? And how can DMOs best prepare for the eventual resumption of travel?

The key to answering these critical questions lies in capturing the data needed to properly prepare for the eventual increase in consumer demand for travel. This in turn will allow DMOs to plan accordingly, devising marketing campaigns designed to lure travelers to the most attractive destinations, ensuring their safety, and offering them experiences that align closely with their desires and interests. In what follows, we have synthesized data from BCG and Google consumer sentiment surveys and analysis conducted over the past several months, and from Google search data, to provide an in-depth view of the current state of the travel industry, how the pandemic has affected consumer attitudes toward travel and tourism, as well as recommendations on the way forward for the industry to recover.

As the effects of the pandemic decline and borders progressively reopen, prospective travelers will be eager to be on the move again, and DMOs must be ready. This will require a level of speed and agility that will likely be new to many DMOs, long accustomed to the slower pace of more predictable times. But it is essential if they are to recapture their pre-pandemic visitor numbers.

The Rise of COVID-19

Over the past 20 years, the global travel and tourism business has grown at an impressive 5% annual pace; in 2019 it totaled \$4.7 trillion. DMOs have been at the heart of this growth. Their roles vary: while some focus primarily on promoting their country's attractions to tourists, others are charged with helping support the local economy, attracting outside investment in cultural and sporting events. Some oversee implementation of the local tourism sector strategy, even regulating such matters as licensing and quality standards. Some are supported entirely by their local governments; others collect fees from the local hospitality, cultural, and entertainment industries.

In short, DMOs are central to the economic well-being of localities everywhere, and especially to markets that are heavily dependent on tourism. By the beginning of 2020, their marketing plans and schedule of events would have been set for the coming 12 months.

Then came COVID-19.

First detected in December 2019, a few first-mover countries shut their borders in January. Then,

in mid-March 2020, the World Health Organization officially declared COVID-19 a pandemic, and countries around the world initiated domestic lock-downs and began closing their borders to travelers.

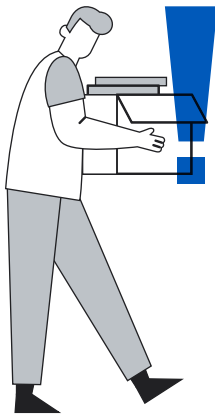
The impact on the travel industry was immediate. According to OAG flight data, more than 133 million international trips were taken in March, helping to spread the coronavirus; by April, however, that number had declined rapidly, to just under 16 million. As of June, that number had only increased marginally to 19 million.

While domestic airline travel has remained somewhat healthier; still, the total number of commercial passenger aircraft being stored reached an unprecedented 55% in April, up from just 10% at the start of 2020, and far higher than the number in storage following the Sept. 11, 2001, terrorist attacks (see Exhibit 1). Google searches related to air travel declined 62% from their January levels, as major international expositions, conferences and sporting events across the globe were cancelled or postponed, including Dubai's Expo 2020, the Tokyo Olympics and the Beijing Motor Show.

Exhibit 1 | The percentage of commercial aircraft being stored reached an all-time high in April, though it has declined somewhat since then



Note: To qualify for in-storage status an airliner must be observed as having had no flight activity for at least three consecutive days, regardless of any statements of intent by its operator. Cirium may retroactively update depending on carrier data submissions.
Source: Cirium Fleets Analyzer



As a result, despite massive stimulus packages aiming at softening the pandemic's impact, [more than 120 million jobs](#) may be lost in the travel and tourism industry, and that could rise to 190 million jobs, depending on how long travel restrictions remain in place, according to the World Travel and Tourism Council. That's a staggering 36% - 58% decline from the 330 million jobs in the industry in 2019. The industry's contribution to global GDP could decline by \$3.4 trillion (38%), it estimates, and by up to \$5.5 trillion (62%) under the worst-case scenario.

There is no telling for sure when the industry will recover. The COVID-19 situation remains volatile, with many countries experiencing waves of infection amid inconsistent government responses. We are currently tracking five potential scenarios for recovery, with the prolonged U-shape or L-shape being the most likely for travel to return to pre-pandemic levels in our view (see Exhibit 2). By that time, however, any number of airlines could go bankrupt and hotels, resorts and restaurants will close forever.

Exhibit 2 | Estimates of when the travel industry will recover range from 12 to 18 months or longer

	Travel Revenue 2021	Travel Revenue 2021	Travel Revenue 2021	Travel Revenue 2021	Travel Revenue 2021
Travel industry scenario	Rapid bounce back (V-shape)	Slower, but recovery within 2020 (U-shape)	Gradual recovery stretching into 2021 (Prolonged U-shape)	Structural change; industry growth rate reduced (L-shape)	Double-dip recovery stretching into 2021 (W-shape)
Likelihood	Low	Medium	High	High	Medium-High
Time to recovery	3-6 months (By Sep. 2020)	6-9 months (By Dec. 2020)	12-18 months	12-18 months to stabilize	+18 months
Virus severity and spread	<ul style="list-style-type: none"> Quick containment (rapid drop in new cases and deaths) 	<ul style="list-style-type: none"> Gradual decrease in rate of new cases and deaths 	<ul style="list-style-type: none"> Slow, gradual decrease in rate of new cases and deaths 	<ul style="list-style-type: none"> Slow, gradual decrease in rate of new cases and deaths 	<ul style="list-style-type: none"> Spread of virus decreases but then rapidly increases (new strain)
Government action for citizens	<ul style="list-style-type: none"> Successful containment; relax policies and reassure public 	<ul style="list-style-type: none"> Lockdown for several months; travel discouraged; borders gradually reopen 	<ul style="list-style-type: none"> Lockdown for several months; travel discouraged; borders slowly reopen 	<ul style="list-style-type: none"> Lockdown policies for a long period; travel discouraged; borders slowly reopen 	<ul style="list-style-type: none"> Policies relaxed then rapidly reinstated at sign of resurgence
Consumer travel sentiment and behaviors	<ul style="list-style-type: none"> Leisure and business traffic bounce back quickly Consumer confidence recovers quickly No structural change to behavior 	<ul style="list-style-type: none"> Consumer confidence returns quickly Business and short-haul leisure travel first, followed by long-haul leisure Travel distributors ramp up operations 	<ul style="list-style-type: none"> Consumer confidence takes time to return Businesses maintain strict policies Economic recession Travel distributor failures 	<ul style="list-style-type: none"> Leisure travel reduced by fear; sustainability issues New ways of working persist; strict policies remain Economic depression Widespread failures in travel distribution 	<ul style="list-style-type: none"> Confidence returns only to be hit once more, for a more prolonged period, as safety concerns persist

Safety First

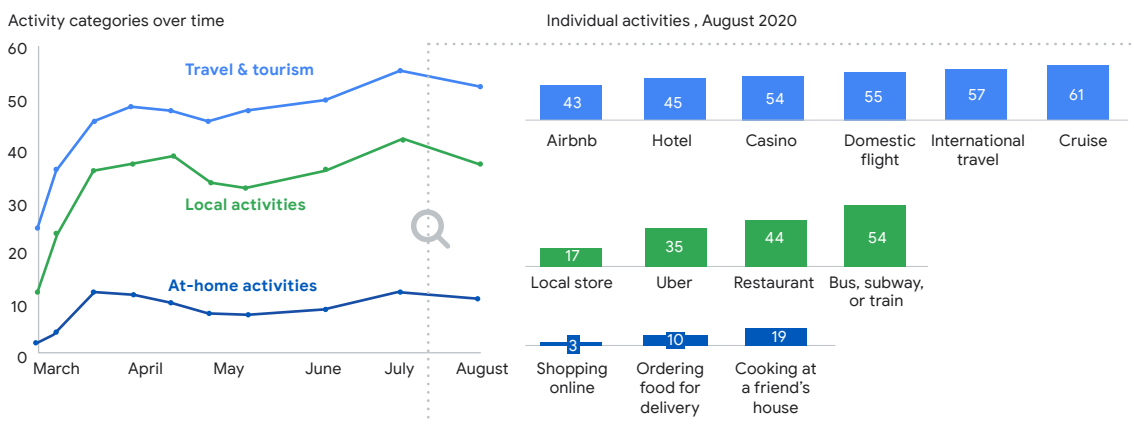


The [impact of COVID-19 on consumer sentiment](#) around travel has been severe. Reviving the travel industry will depend largely on sensitivity to travelers' concerns. Around 80% of consumers in the U.S. and France, for example, believe that the virus will lead to a recession, and more than 45% are concerned about their personal finances. As a result, consumers are notably unwilling to spend on luxury spend categories such as travel. Indeed, consumers who are worried about their personal

finances due to the outbreak are more than twice as likely to want to reduce leisure travel as their less-concerned peers. Financial constraints are not, of course, the only concern. All consumers fear catching the virus; indeed, they are as much as three times more likely to fear getting sick while traveling than when shopping in local stores, and international travel is seen as more dangerous than domestic. In the U.S., for example, 50% of consumers fear catching the virus from traveling (see Exhibit 3).

Exhibit 3 | US consumers are far more concerned about traveling internationally than they are about shopping locally or visiting friends

Respondents who are worried about catching the coronavirus from the following activities (%)

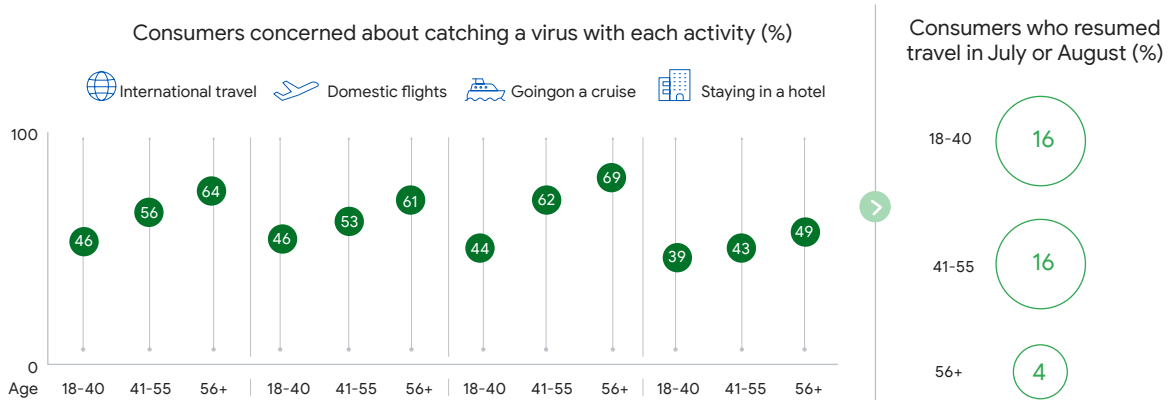


Note: Data as of August 15, 2020. US respondents only
Source: BCG COVID-19 Consumer Sentiment Survey; BCG analysis

Age is a major factor in willingness to travel—understandably, given the greater vulnerability of older people. As of August 2020, U.S. consumers 56 and older,

for example, are considerably more reluctant to participate in any form of travel than those between 18 and 40 years old (see Exhibit 4).

Exhibit 4 | Consumers 56 and over are most likely to have health concerns regarding all travel offerings.

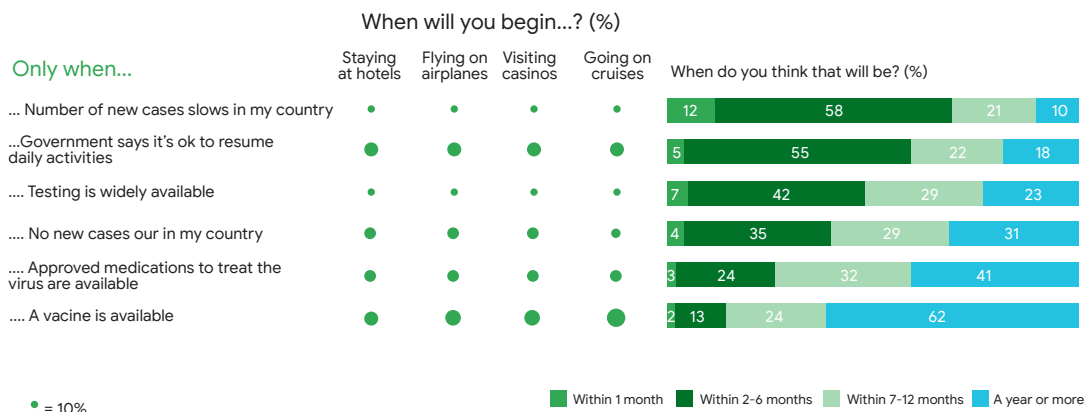


Note: Data as of August 15, 2020. US respondents only
Source: BCG COVID-19 Consumer Sentiment Survey; BCG analysis

More than 70% of consumers believe it is irresponsible to travel until the virus is under control, and more than 65% believe it is not worth the risk of taking a vacation until things mostly return to

normal. The definition of “normal,” however, varies considerably, and that in turn affects the kinds of vacations travelers are willing to take. (See Exhibit 5.)

Exhibit 5 | Consumer sentiment varies widely regarding when the travel’s “new normal” will begin



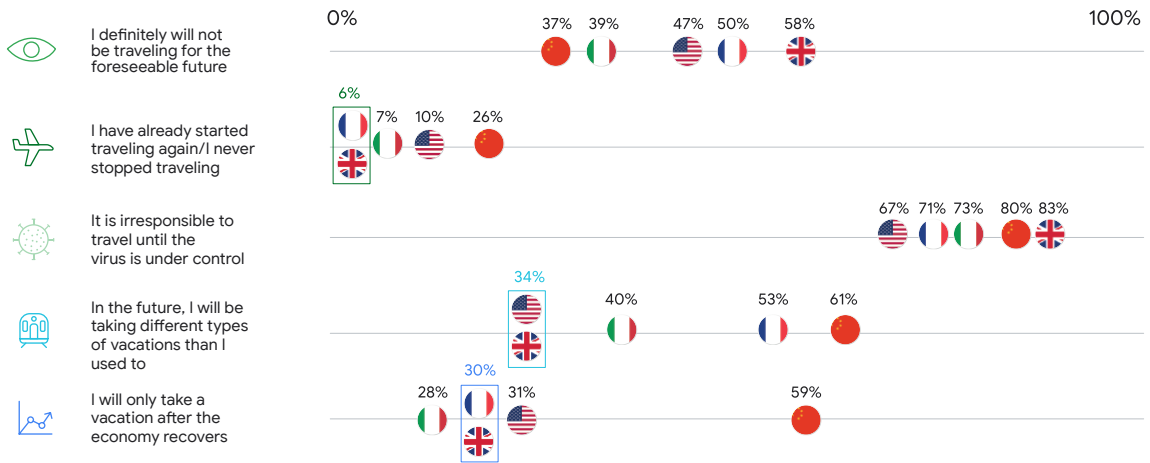
Note: Data as of May 11, 2020. Because of rounding, some bar charts totals do not equal 100%
Source: BCG COVID-19 Consumer Sentiment Survey; BCG analysis

All things considered, the near-term prospects for restarting the travel industry are unclear. As many as 60% of consumers

have no plans to travel for the “foreseeable future”, although that varies depending on where they’re from. (See Exhibit 6.)

Exhibit 6 | When and how consumers expect to be able to travel again varies from country to country

Respondents who “strongly agree” or “somewhat agree” with the following statements (%)



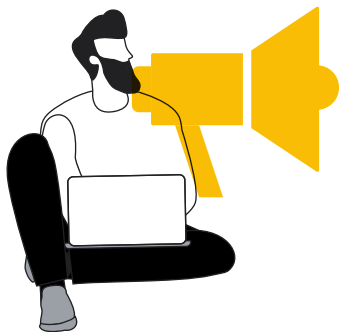
Note: Data as of May 11, 2020
Source: BCG COVID-19 Consumer Sentiment Survey; BCG analysis

Early Actions

Like organizations in every industry, DMOs were entirely unprepared for the advent of COVID-19. In many cases, their responses were swift. Some established emergency task forces to address issues such as the extent of the damage to their travel sectors and the availability of travel opportunities remaining in their markets. Could they refocus their scope and efforts away from international tourism and toward domestic travelers—not traditionally their target markets?

DMOs in countries where tourism is vital to the economy were under the most pressure to revive tourism, requiring many to take several unfamiliar actions. Many participated in meetings at the highest level of government, a rare occurrence. They found themselves collaborating with a wide variety of sometimes unfamiliar government stakeholders, to advocate for key measures needed to keep them operating.

It soon became clear that protecting their own tourism brands would be critical if they were to quickly revive tourism in their home markets. To that end, many have already developed innovative campaigns—including videos and social media programs—designed to stay engaged with prospective travelers and keep them dreaming of travel during the pandemic, while reassuring them on safety precautions needed during travel. Portugal's tourism board, for example, has focused its new campaign on the message that you "can't skip hope," encouraging prospective travelers to reflect on the future of travel. Both the Maldives and the Seychelles have released campaigns suggesting that travelers keep dreaming about their next beach vacation. Sensitivity to the concerns of travelers regarding health and safety was key to setting the right tone.



Getting to Normal

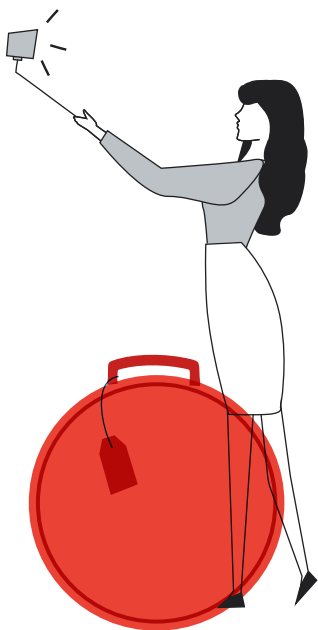
The travel and tourism industry has proven markedly resilient in the face of past disruptions. Within a year after both the Sept. 11 terrorist attacks and the 2008 financial crisis, it had returned to its average upward growth trend. The COVID-19 pandemic is different, however, in part because it is the first truly global crisis to take place in the age of a fully connected planet. In addition to the health risks imposed by the virus, its recovery will largely depend on how deep the crisis-induced recession lasts and the degree of its impact on consumers' ability to spend.

Certainly, the desire to return to normal is strong. Consumers rate leisure travel as the top activity they miss the most, and 31% want to increase their leisure travel once the crisis subsides.

Signs of revival can already be found in the data on online searches related to travel,

assuming consumers' concerns about health and safety can be alleviated. Fully 40% of those who say they won't resume travel until a vaccine is available still expect that they will be able to travel within the next 12 months.

And they are looking for opportunities. In April 2020, air travel-related queries carried out on Google were down 62% year-over-year, but by August, they were down just 42% compared with August 2019. The top three questions users asked Google globally related to travel conducted in June comprised "When can we travel again," "when will international travel resume," and "when will it be safe to travel again." while top questions in August were related to where and when we can travel "right now". In fact, 45% of the top 100 questions related to travel focused on the impact of COVID-19, the need to travel as soon as possible and travel safety.



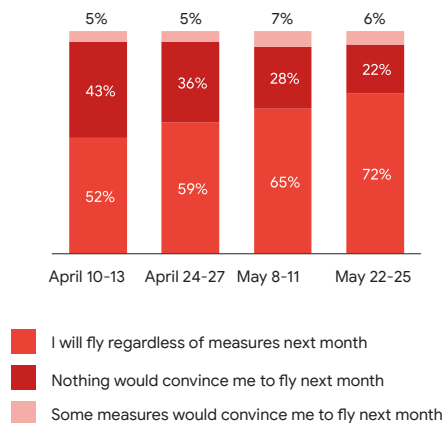
Google flight search data, too, indicates increasing interest on the part of consumers in traveling sooner rather than later; the “look-ahead” window—the number of days between search and departure dates—for domestic airline travel decreased from 48 days at the end of April to just over 30 days at the end of June and to 28 days in August. Interest in international travel is growing as well, with the look-ahead window on international flights narrowing from 77 days at the end of April to less than 45 days by the end of August. Overall, more

than three quarters of consumers are searching for trips less than three months out.

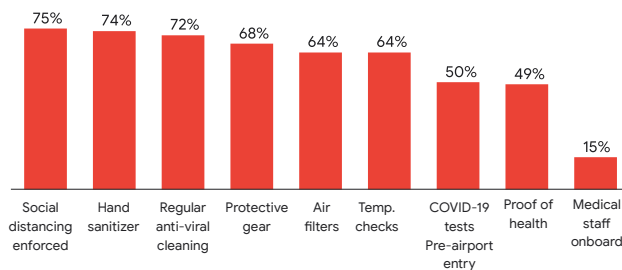
And while safety remains top of mind, with 44% of consumers hoping to travel soon citing “worry” as their No. 1 concern, most travelers would be willing to fly again as early as next month if certain health and safety measures were in place (see Exhibit 7). Indeed, 60% of consumers ranked virus safety measures among their top three considerations when choosing a brand to travel with.

Exhibit 7 | The willingness to fly in the short-term depends largely on the extent of the health and safety measures in place

% of consumers needing additional sanitary measures before flying again in next month



Sanitary measures needed by consumers who answered “some measures would convince me” from May 22-25



Note: Data as of May 25, 2020
Source: BCG COVID-19 Consumer Sentiment Survey; BCG analysis

Travel Dreams

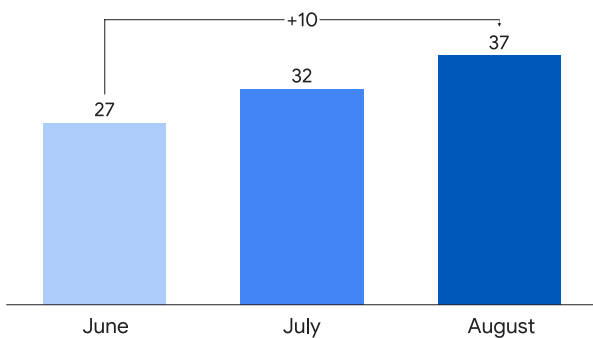
In short, consumers are already showing signs of re-entering the initial “discovery” phase of the typical consumer travel experience. Where do they dream of going, and why?

Overall, more than 35% of consumers in the US expect to

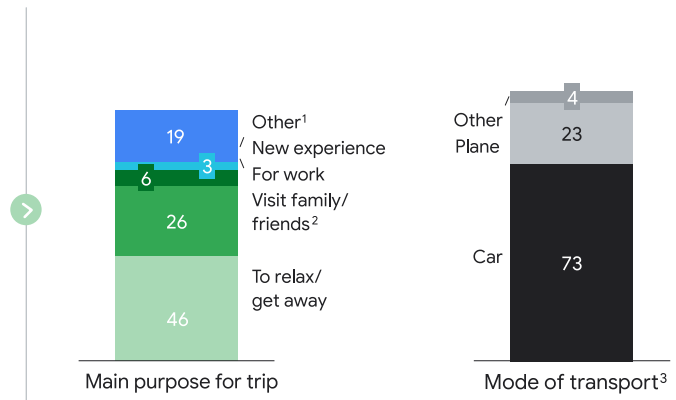
take different types of vacations than they are typically used to. For their first trip after the outbreak, most prospective travelers are looking to get away from it all on relaxing trips or visits to family and friends. And they expect to take shorter trips, preferably by car (see Exhibit 8).

Exhibit 8 | Consumers are looking forward to relaxing getaways or visits to loved ones, and prefer to travel by car

Respondents who have traveled since the coronavirus outbreak? (%)



Respondents' reasons for traveling since the virus outbreak and preferred modes of transportation(%)



1. Category includes the responses “Attend a special event” and “Other”. The “Other” group included some necessary trips, such as family/medical emergencies or moving

2. Category includes the responses “Visit family/relatives” and “Visit friends”

3. According to Phocuswright 2019 consumer travel survey, more people now choose to drive, compared to 33% car, 61% plane, and 6% other in 2018

Note: Data as of August 16, 2020

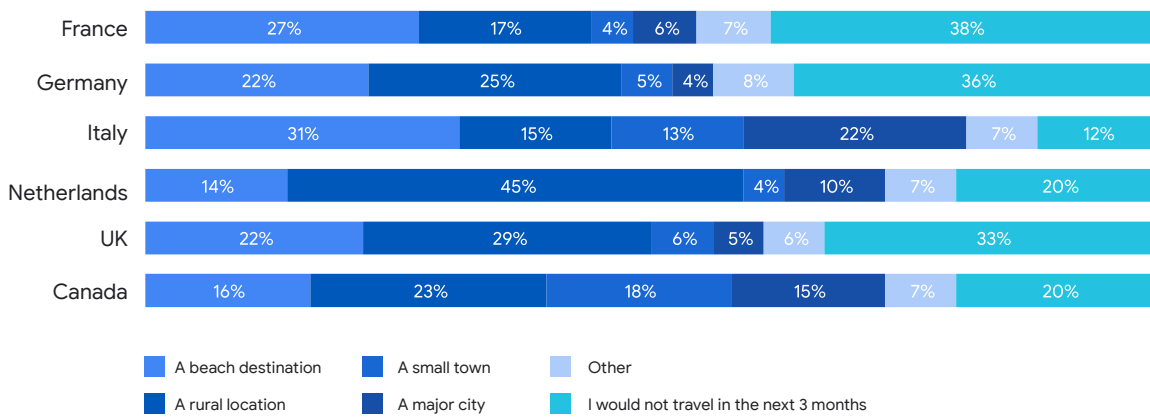
Source: BCG COVID-19 Consumer Sentiment Survey; BCG analysis



Heading to the beach and visiting rural areas or small towns is the highest priority among would-be travelers, particularly for the Italians and French (see Exhibit 9). This may explain why sales of recreational vehicles (RVs) in the U.S. are strong. Almost

20% of consumers there plan to take a trip in an RV in the next 12 months—half of whom attribute their interest in RV camping to current health concerns—and 11% plan to purchase one, according to the RV Industry Association.

Exhibit 9 | Consumers are looking forward primarily to vacations at the beach or in rural location



Note 1: Data as of August 14, 2020

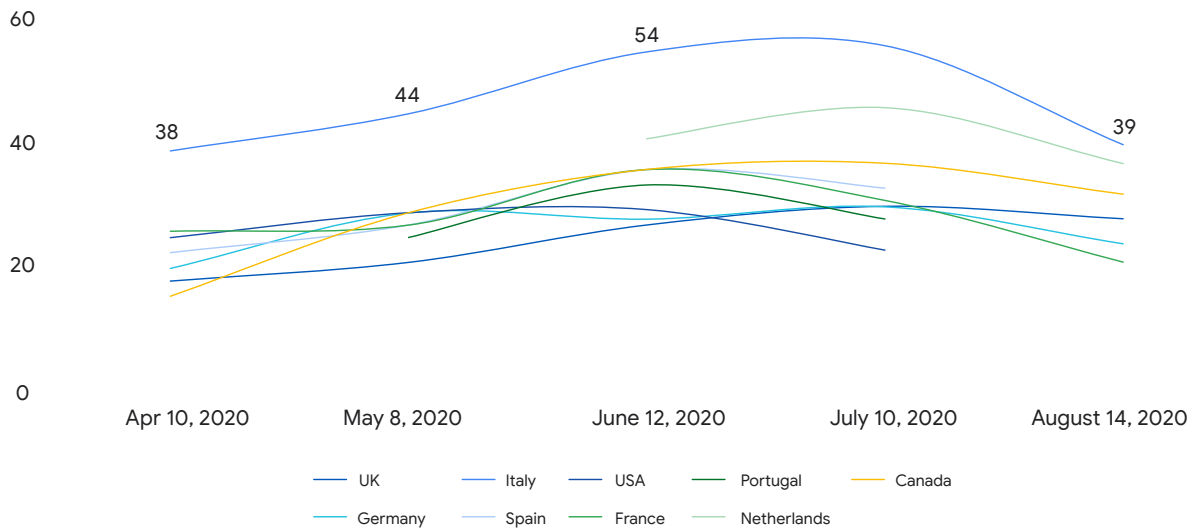
Note 2: May 1st 2020 Canada and May 22nd Netherlands changed methodology to collect answers from android users. All other results were collected from publisher network

Source: Google surveys

As noted, interest in domestic travel remains relatively healthy—no surprise, given safety concerns and the many ongoing restrictions on international travel. Still, the percentage of survey respondents who say they are planning to travel domestically for a holiday within the next six

months has fluctuated. In June, more than half of respondents in Italy, for example, confirmed that they would travel anywhere within their home country; since then, however, that number has tapered off amid concerns about renewed coronavirus outbreaks. (See Exhibit 10.)

Exhibit 10 | Domestic travel remains reasonably healthy despite fluctuations in response to the coronavirus

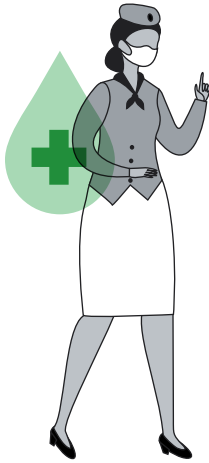


Note 1: Data as of August 14, 2020
 Note 2: May 1st 2020 Canada and May 22nd Netherlands changed methodology to collect answers from android users. All other results were collected from publisher network
 Source: Google surveys

That’s why domestic operations continue to be the key focus for most of the world’s airlines. As of June, they represented an average 84% of their activities, up from 60% in January. In April, Google search queries for domestic flights globally were down about 45% compared with last year, but they have grown 36% every month since then. The strongest growth has been in North Africa and Eastern Europe, while South Asia, North and Central America have lagged.

Several fast-moving DMOs have already started capitalizing on travelers’ focus on domestic travel, putting together dedicated campaigns and incentives to further promote interest in local destinations. Japan, for example, recently launched a \$12.5 billion “Go to Travel” campaign to help pay for domestic vacations, providing a subsidy of 8up to \$185 per traveler. And Vietnam is luring domestic travelers with a public-private campaign offering discounts of up to 50% on airlines, travel agencies, and resorts.

Moving Fast



The COVID-19 pandemic has radically transformed consumer behavior with respect to their travel and tourism desires and expectations, and it will likely continue to do so, even as conditions return to normal. In response, DMOs must develop new ways to assess consumers' attitudes toward travel accurately and quickly, and to adjust their marketing campaigns accordingly. In this effort, building trust among prospective travelers in the health

and safety of their travel offerings will be essential. In contrast to the pre-pandemic travel environment, when travelers' wishes and expectations were far more stable and predictable, the demand for travel is shifting unpredictably across categories, channels, and geographies. Supply will shift unpredictably, too, as markets open to travel at different speeds, depending on the pace of new confirmed cases and the rise and fall of travel restrictions.

Competition to capture the pent-up demand for travel will be fierce, as DMOs rush to attract visitors and capture market share. So DMOs must act swiftly and with agility to avoid the significant downside risk, as the potential for losing market share quickly is high. The key, we believe, is to follow a Five-R approach:

- **Reassess** their offerings and value proposition in light of evolving traveler preferences, needs, and concerns.
- **Reassure** travelers on the safety of travel to their chosen destination by addressing their health concerns.
- **Raise awareness** of the destination, including added safety measures and local government regulations, to inspire consumers.
- **Remove** barriers in converting consumers to travelers by making the case for traveling with conscientious health and safety measures in place.
- **Revive** spend in the local economy by supporting tourism.

Only by gathering and carefully analyzing near-real-time data and business intelligence will DMOs gain the insights they need in our current highly volatile travel environment. Traditional data and analytics that rely on historical data and travel patterns will not be adequate for predicting the shape of the coming recovery, or to respond effectively. The typical “upper funnel” of demand—the stage where prospective travelers dreamed of their next travel destination—has now been reduced substantially, and limited by factors such as the progression of COVID-19, government travel sanctions, reduced flight availability, and the like.

To gain a better understanding of the current state of consumer demand for travel, market availability (including flights, hotels, resorts and other aspects of supply), and the state of the sector generally, DMOs must capture and analyze data from a wide variety of sources.

One solution would be to develop an [analytics “lighthouse”](#) that

sources data from target market updates and indicators, consumer sentiment and spending activity, in-country supply readiness, and more. Analyzing the data could then provide insights into such matters as the readiness of consumers in target markets to travel, which could then be matched with availability of specific travel options. Such a solution would enable DMOs to support dynamic decision-making and the development of strategies to prepare to respond as source markets and travel segments recover from the pandemic at differing rates.

Real-time analysis will require most DMOs to overhaul their data collection practices, however, since current agreements with data providers are typically set up to enable historical analysis, not the day-to-day changes in consumer sentiment and industry availability that characterizes today’s travel and tourism sector. That’s why DMOs should explore all the potential data sources that provide the most useful up-to-date information possible.

With the best available data and insights in hand, DMOs can then begin to coordinate their efforts across three key activities:

- **Product and service development.** Guide deployment of new products and services in light of concerns about COVID-19 and the post-pandemic recovery. Strict health and safety standards, measures and regulations will be essential in luring travelers. At the same time, DMOs must work with both public and private partners to ensure an adequate range of safe, attractive options once they arrive, including new “wellness” travel products. Getting this right will require careful analysis across the entire travel experience, from dreaming, planning and arrival through to departure.
- **Stakeholder engagement.** Inform stakeholders, including governments and healthcare officials and travel industry suppliers, of unified communication messages and collaborate with them on setting travel and health standards. Encourage stakeholders to help communicate marketing messages to expand communication channels, and lobby government decision-makers to reduce barriers to travel.
- **Marketing.** Reallocate marketing spend by channel, and guide campaign messaging and timing.

The Right Products and Services at the Right Time

As the world recovers from the COVID-19 pandemic, demand for travel will be largely shaped by perceptions of a destination's health conditions and standards of medical care. Therefore, DMOs must take on the unfamiliar task of protecting the health and safety of travelers by

establishing itself as a credible participant in the effort to ensure that the destination's healthcare system is adequately prepared to receive travelers in case they get sick, and communicating the destination's safety through its marketing messages.

To that end, DMOs should promote the full range of health and safety measures across the entire travel journey. Countries and companies around the globe are already implementing advanced travel safety measures to reassure visitors, to prepare them for traveling, and protect them once they arrive. These include:

- **Holistic health and safety protocols.** Greece's Minister of Tourism, for example, has outlined nine health and safety protocols ("The nine rules for tourists, flights, and hotels in Greece") in response to COVID-19.
- **Rapid COVID-19 tests, medical checkpoints, and sterilization robots at airports.** For example, Emirates Airline, in partnership with Dubai Health Authority, tests passengers before boarding and makes test results available within 10 minutes, allowing the airline to clear each and every passenger. And Hong Kong Airports has deployed autonomous robots equipped with both a UV light sterilizer and an air sterilizer that kill up to 99.99% of bacteria and viruses in the air and on object surfaces in just 10 minutes.
- **"Clean certification" for hotels.** Tourism authorities in both Singapore and Portugal have partnered with local health authorities to issue "clean and safe" certificates for hotels. Others have turned to international organizations such as the UN's World Trade Organization and the WTTC to validate the measures they've taken to ensure traveler safety. Such efforts help promote strong standards of hygiene and enable visitors to differentiate between certified venues and others.

- **Special travel insurance.** Cyprus provides travel insurance to ease tourist's infection anxieties by promising to cover trip costs if a traveler contracts COVID-19 while visiting the country. The coverage includes lodging, food, drink, and medicine for patients and their families.
- **Contactless technology.** A variety of high-tech solutions have been implemented as well. Some are as simple as no-touch payment and e-wallet technology and virtual or self-guided audio tours. Others are more avant-garde measures. Some airports are using facial and iris scanning for self-service bag drops, queue access, boarding gates, and retail and duty-free outlets. Hotels have tried dynamically generated room service menus on mobile app. Hilton Hotels has developed a mobile app for opening hotel room doors, controlling room temperature and lighting, and operating TVs.

Meanwhile, clusters of countries are banding together to create multilateral “travel bubble” agreements in hopes of unlocking international tourism by devising coordinated health protocols, mutually lowering travel barriers and reducing other travel friction points for consumers. The Baltic nations—Lithuania, Latvia, and Estonia—launched Europe’s first travel bubble by opening the borders between them, given their similar epidemiologic situation and economic interdependence. A similar agreement between Australia and New Zealand is expected to be in place by September. China is working to create a travel bubble with Hong Kong, Macau, Taiwan, and South Korea, and Singapore is in talks across Asia to establish “green lanes” for travel. Looking forward, countries might consider implementing repatriation agreements with source markets, allowing travelers to return to their home countries to recover in the case they still caught COVID-19 with all the preventative measures in place.

Such measures are essential to making sure their destinations are safe, and attractive to travelers. But the situation with respect to COVID-19 is volatile, and DMOs cannot rest easy. Instead, they must constantly monitor and update their travel safety

measures in light of changing circumstances and as global health and safety standards evolve. Travelers from different source markets will likely have different perceptions and expectations of what is considered safe and what measures they expect to find when they travel. So DMOs must gather the data needed to sense which health and safety measures matter most to prospective travelers, depending on their primary source markets.

DMOs must take great care in communicating their destination’s health and safety measures. The focus should be on health and safety, while promoting the friction-free nature of travel to and within a particular destination. In order to build trust, however, such messages must strike the right balance between the positive and the believable—a lack of credibility will only scare off potential visitors.

Finally, it is essential for DMOs to listen to the traveler. Create a feedback loop for travelers to provide input on their travel attitudes and experiences, and use the information gathered to adjust safety measures and marketing messages accordingly.

Only by being among the leaders in global travel safety will they be able to compete successfully for visitors from home and abroad.



Working with Stakeholders

If DMOs are to carry out their plans to ensure a safe destination for visitors and effectively communicate its attractions as a place to visit, they must identify and engage with the key players in their extended travel ecosystem to deliver unified messages around the safety measures being put in place. These stakeholders include:

- **Government entities**, including health authorities and road and transport authorities, are instrumental in making sure health and safety measures are in place.
- **Travel and tourism** industry players are just as eager to attract travelers as are DMOs. These include local airports, domestic and international airlines and hotels, as well as international cruise lines, traditional and online travel agents, tour operators, and destination management companies.
- **Other industry players**, such as local transportation companies, entertainment and event companies, and services like cleaning companies, also benefit immensely from travel and tourism.

To keep all stakeholders informed and engaged, DMOs should act as a clearinghouse for all information on the health and safety measures in place, and provide them regular updates on the prospects for the

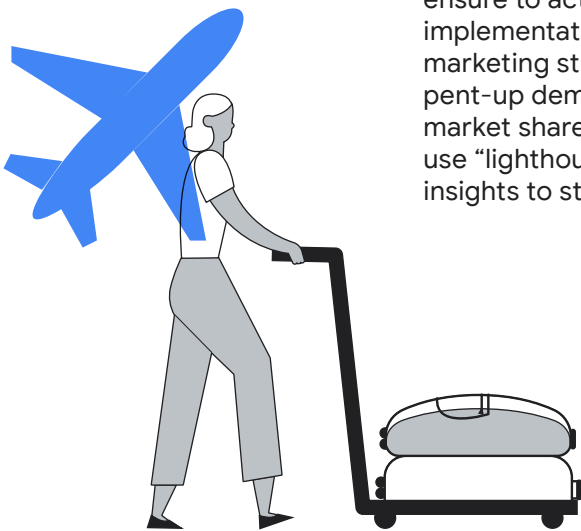
resurgence of travel in their market. This could be accomplished in several ways, such as a website information portal, industry newsletter, detailed industry reports, Q&A helplines, or live chatbots.

Conclusion

Proper health and safety measures, new products and services, and alliances with industry stakeholders are foundational elements DMOs must put in place as they prepare for their borders reopening and travel resuming. As interest in the destination grows, DMOs must ensure to activate and accelerate implementation of their targeted marketing strategies to serve the pent-up demand and capture market share. How DMOs can use “lighthouse” data and insights to stay ahead of the

travel demand curve and devise successful marketing campaigns is the subject of the next report in this series.

Meanwhile, as international borders remain closed, DMOs everywhere need to focus on domestic travel opportunities, and as would-be travelers and tourists dream of their next travel experiences, DMOs everywhere must act now to prepare and ensure that those upcoming experiences meet travelers’ growing expectations.



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