



Destination Organization Responses to COVID-19

June 2020

CTO Member Countries



International Institute
of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY

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INTRODUCTION

The COVID-19 pandemic has impacted tourism more than any other industry. While people everywhere have been instructed to stay home, lock down and even quarantine to stem the spread of the virus, the people and places most dependent on visitors have watched their primary source of income dry up. This is particularly true in the Caribbean—the most tourism-dependent region in the world.

For the Caribbean, where tourism accounts for about 15.5% of total GDP and approximately 14% of jobs are tourism dependent, the economic toll will continue to be enormous.¹ While the situation is unprecedented in our lifetimes, by evaluating the response of destination management and marketing organizations and tourism business owners, we can not only prepare for a sustainable recovery but adapt lessons learned to potential future waves of COVID-19, which we hope will be less severe.

To compete effectively during this period of great disruption, it is incumbent upon destinations to work together to find common solutions and bring them to scale. National destination management and marketing organizations—including ministries of tourism and tourism boards and authorities—play an important role in facilitating the coordination and cooperation needed across the tourism value chain. This is true at the national, regional and local levels, and between the public and private sectors. It is therefore crucial that we monitor the effects of COVID-19 on destination management and marketing organizations' operations, strategies and financial health. These insights may help us to understand recovery planning and the future outlook of tourism in the Caribbean.

The Caribbean Tourism Organization (CTO) partnered with the George Washington University International Institute of Tourism Studies (GW IITS) to conduct rapid research on the effects of COVID-19 on national destination management and marketing organizations in CTO member countries, and their early responses to the global pandemic. We conducted a survey to monitor the effects of COVID-19 on Destination Organizations (DOs) in CTO member countries. The online survey, designed and analysed by GW IITS, was conducted 6–22 May 2020 amongst CTO's 24 member countries. Sixteen (16) of the 24 CTO member states responded to the survey, for a 67% response rate. Respondents included directors, CEOs and permanent secretaries and advisors from ministries of tourism and tourism boards/authorities.

The GW IITS also inventoried tourism destination actions from mid-March to early May on five key issues:

1. Mobility
2. Economic relief
3. Destination management and community support
4. Crisis communication and
5. Destination marketing

We reviewed the websites and social media channels of various destination marketing organizations, industry associations and destination consumer-facing websites to better understand the tourism industry's response to COVID-19. We also compiled data on mobility and economic relief from various secondary sources. A total of 43 countries in the Greater Caribbean, including CTO's 24 member countries, were included in this component of the research.

This report presents the main findings of the survey and inventory of tourism destination responses to COVID-19.

In addition to this report, we hope that you will also review the companion guide, Caribbean Destination Organizations: Exemplary Responses to COVID-19, which presents a compilation of good initiatives that DOs implemented during April and May 2020.

¹<https://www.thedialogue.org/analysis/can-the-caribbean-tourism-industry-withstand-covid-19/>



MAIN TAKE AWAYS

Preparation:

While 50% of survey respondents had a crisis management plan in place prior to the global pandemic which covered health crises and pandemics, many respondents noted that they were often less useful than hoped. These plans were useful to establish communications protocols, but their broader utility was quite variable in light of the scale and severity of the COVID-19 pandemic.

Mobility:

During April and May, all CTO member countries had restrictions on both international and domestic travel. The main state interventions taken include closure of accommodation or refusal of new guests (96%), closure of all non-essential businesses (96%), prohibition of dining-in service at restaurants (96%), quarantine of people arriving (96%), prohibition on public gatherings (83%), screening at the port of entry (92%), restrictions on other types of social gatherings (79%), social distancing (75%), and closure of local airports and/or ports (79%). CTO member states found that these measures were effective in containing COVID-19 by early May.

DO Operations:

The priorities of survey respondents during the early phase of the pandemic were to ensure the health and safety of employees, maintain communications with stakeholders and partners and provide economic support to tourism businesses and tourism workers. Most DOs have been able to conduct business virtually, with most work focused on communications. Fifty per cent (50%) of survey respondents are monitoring the economic impacts resulting from the full halt in tourism.

DO Financial Health:

Sixty-one per cent (61%) of survey respondents confirmed that they have had to reduce their budgets. All other respondents indicated that they anticipate cuts in the future. These budget cuts have not affected employment levels for the majority of DOs. However, 39% of respondents said that they expect cuts in the future. These findings indicate that most DOs will need financial support in the near future.

Crisis Communication:

CTO member-country DOs increased their crisis communication responsiveness by 80% from April through early May as measured by their inclusion of COVID-19 information and guidance on their websites. The increase was significantly greater—219%—for communication responsiveness on social media channels. The improved rate of communication responsiveness suggests that DOs worked to develop a unified communication strategy that ensured consistency across all communication channels, such as their websites and social media—primarily Facebook.

Destination Marketing:

Fifty per cent (50%) of respondents noted that they have reduced marketing spend. The other 50% noted that while they have not had to reduce their marketing spend, they are re-allocating resources amongst existing and/or new strategies. The top priorities for marketing and communications are maintaining brand presence, maintaining relationships with travel, trade and other partners and providing up-to-date information on their websites and social media channels.

Destination Management:

DOs implemented very few destination management and community support actions during the early phase of the crisis. Actions mainly focused on training unemployed tourism workers and providing support to essential medical workers.

Economic Relief:

The three most common economic relief measures implemented by CTO member countries have been increased unemployment benefits (92%), providing new and favorable SME loans and credit lines to affected sectors (87.5%), and increased public spending (83%). These are short-term economic relief measures (3–6 months), with most expiring by the end of August or September. Sixty-seven per cent (67%) of survey respondents indicated that they have been involved to a great extent in developing the government's economic response to the pandemic. DOs will need to remain vigilant and continue advocating for support to tourism businesses beyond the end of short-term measures.

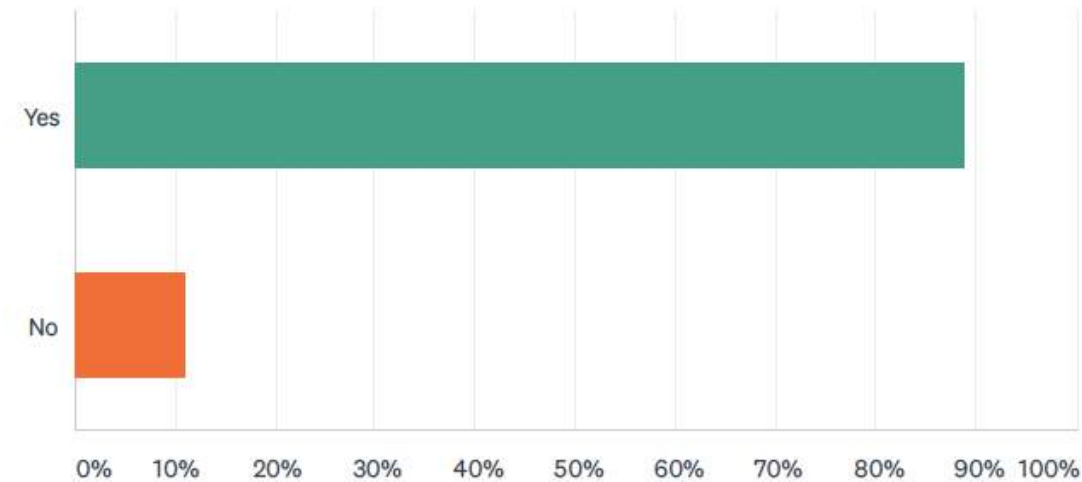
Recovery Planning:

Fifty-six per cent (56%) of survey respondents indicated that recovery plans are well underway, while 22% stated that they have completed their recovery planning. Fifty per cent (50%) indicated that they are working to identify resources across all government agencies to a great or very great extent. Nearly all respondents (99%) foresee their recovery plans foresee sustainability practices or initiatives being a major component or central focus of their recovery plans. These insights indicate that DOs are prioritizing sustainability as they work to rebuild tourism.

1 Preparedness

According to the survey, 89% of respondents had a crisis management plan in place in their country before the outbreak of COVID-19 (Figure 1).

Figure 1: Did your destination have a crisis management plan in place before the outbreak of COVID-19?
Number of Respondents: 18



Of the 16 respondents that had a crisis management plan in place prior to the pandemic, 75% confirmed that their country’s crisis management plan covered health crises and pandemics. However, there were mixed views about the utility of the plans in context of the unprecedented halt in tourism. Some said that their plans were useful for the communication protocols. Others said that their plans ranged from very to marginally useful given the scale and severity of this crisis and how recently those plans had been updated.

For those countries that did not have a plan, 25% said that their immediate response involved development of a business continuity plan and post-COVID-19 recovery and resiliency strategies. All respondents considered these living documents. These destinations looked to protocols set by their ministries of health, Pan American Health Organization, Caribbean Public Health Agency (CARPHA), and other relevant agencies, and used past experiences with natural disasters to determine how best to mobilize their resources to respond to the crisis.

2 Mobility

Measures taken by countries in the Caribbean to stem transmission of COVID-19 had considerable impacts on mobility. We tracked interventions taken by each of the 43 countries in the Greater Caribbean from 12 April to 25 May 2020.

Figure 2: State Interventions to Stem Transmission of COVID-19



As seen in Figure 2, during April and May 2020, 96% of countries in the Greater Caribbean had restrictions on both international and domestic travel.

The main state interventions taken include closure of accommodation or refusal of new guests (86%), closure of all non-essential businesses (81%), prohibition of dining-in service at restaurants (81%), quarantine of people arriving (81%), prohibition on public gatherings (78%), screening at the port of entry (78%), restrictions on other types of social gatherings (75%), social distancing (73%), and closure of local airports and/or ports (72%).

These measures have been effective in containing the transmission of the Coronavirus throughout the Caribbean. On 6 April, the CARPHA stated that the region has 4,016 total confirmed cases in 33 countries/territories; 24 (72%) of these countries are CARPHA member states. On 8 May, leading researcher and academic Dr Clive Landis, pro vice-chancellor for undergraduate studies at the University of the West Indies (UWI) and chairman of the UWI COVID-19 task force, announced that COVID-19 had been successfully contained in the English-speaking Caribbean and Haiti.

Dr Landis emphasized that this does not mean that the Caribbean is out of danger. The region will have to learn to live with the threat for at least the next year. However, from early June, countries have begun to lift restrictions and make announcements about reopening for tourism.

3 Impact to Operations of DOs

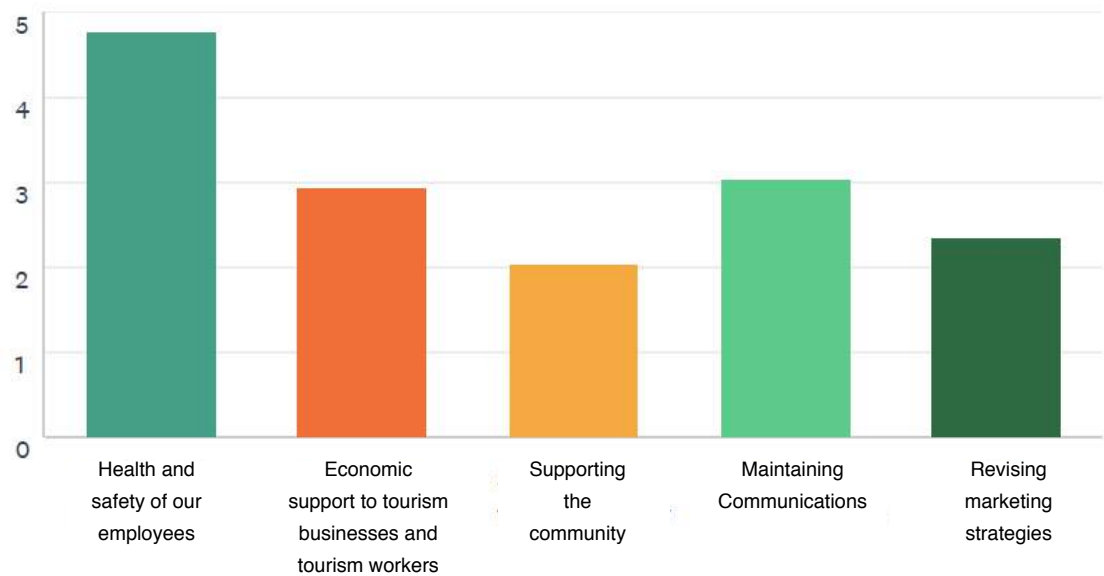
During this crisis, DOs have been working remotely on maintaining communications with stakeholders and partners, despite the pandemic’s profound effect on budgets and operations.

PRIORITIES

As seen in Figure 3, DOs indicate that their top priorities during the pandemic (in order of importance) are:

- 1. Ensuring the health and safety of their employees
- 2. Maintaining communications with stakeholders and partners
- 3. Providing economic support to tourism businesses and tourism workers
- 4. Revising marketing strategies
- 5. Supporting their communities

Figure 3: What are your organization’s top priorities as you lead through this global pandemic?
Please rank your answers with 5 being the highest priority and 1 being least of your priorities.
Number of Respondents: 18



Fifty per cent (50%) of respondents reported that they are working to a great or very great extent with local and international partners to measure economic impacts resulting from a full halt in tourism; and 28% of respondents reported that they are working to do the same to a moderate extent.

Figure 4: To what extent are you able to conduct business online and complete work remotely in the following areas?
Number of Respondents: 18

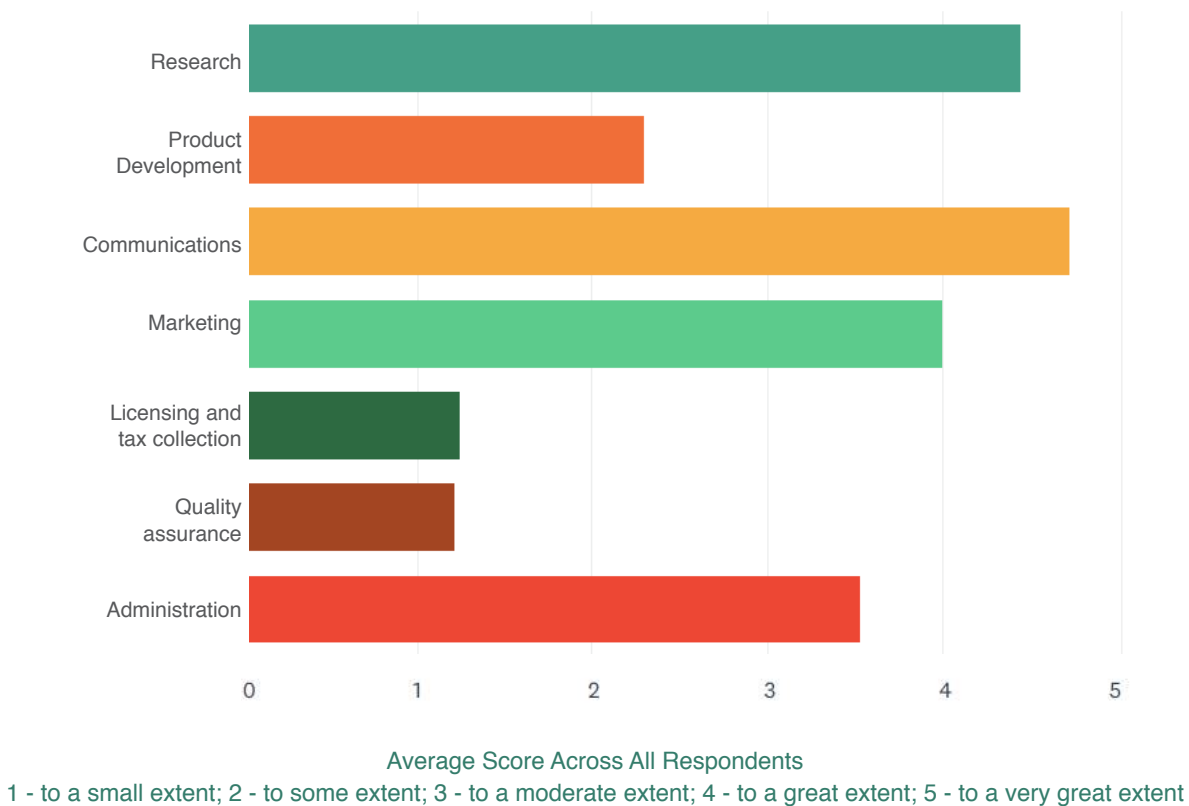


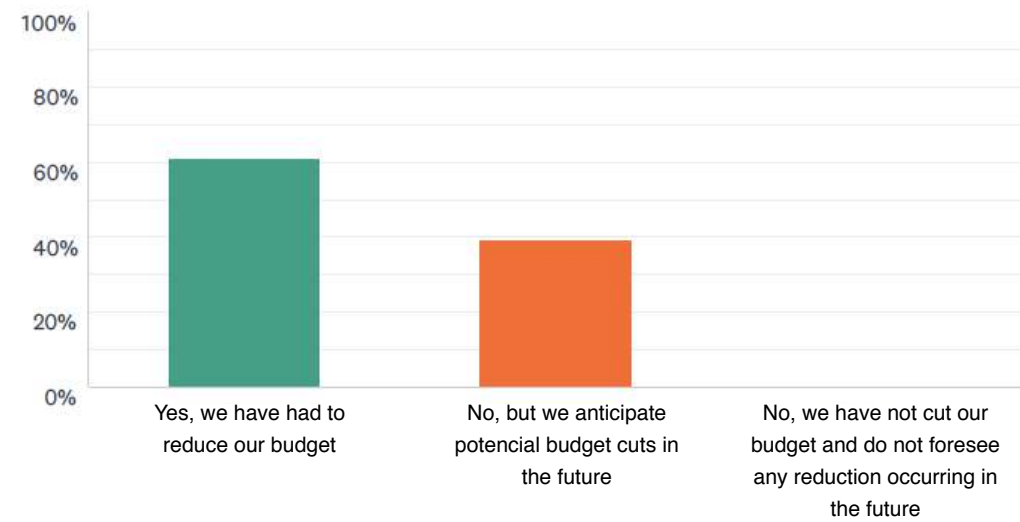
Figure 4 illustrates the extent to which DOs have been able to conduct their work remotely. The results indicate that DOs have been able to conduct some level of business online and get things done remotely. Communications, research, marketing, and administration tasks have been the most successful.



OPERATING BUDGET

Sixty-one per cent (61%) of respondents confirmed that their organizations have had to reduce their budgets (Figure 5).

Figure 5: Has the COVID-19 pandemic affected your organization's overall budget?
Number of Respondents: 18



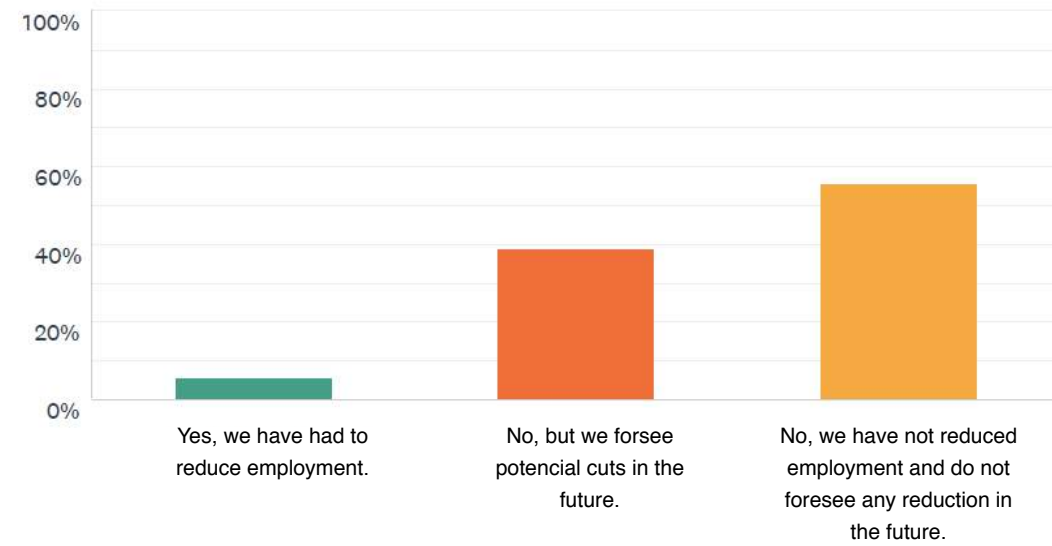
Seventy-three per cent (73%) of respondents who indicated that they have had to cut their budget have done so by 1%–25%, and 18% have cut their budget by 26%–50%. Only one respondent stated that they have had to cut their budget by more than 50%.

All other respondents (39%) noted that while they have not had to cut their budget to date, they anticipate potential budget cuts in the future.

STAFFING

As illustrated in Figure 6, budget cuts have not yet affected employment levels in the majority of DOs.

Figure 6: Has the COVID-19 pandemic affected your organization's employment levels?
Number of Respondents: 18



Fifty-six per cent (56%) of respondents indicated that they have not reduced employment and do not foresee any reduction in the future; 39% said that while employment has not been affected to date, they foresee potential cuts in the future. Only one respondent stated that they have had to reduce employment (26%-50% reduction to date).

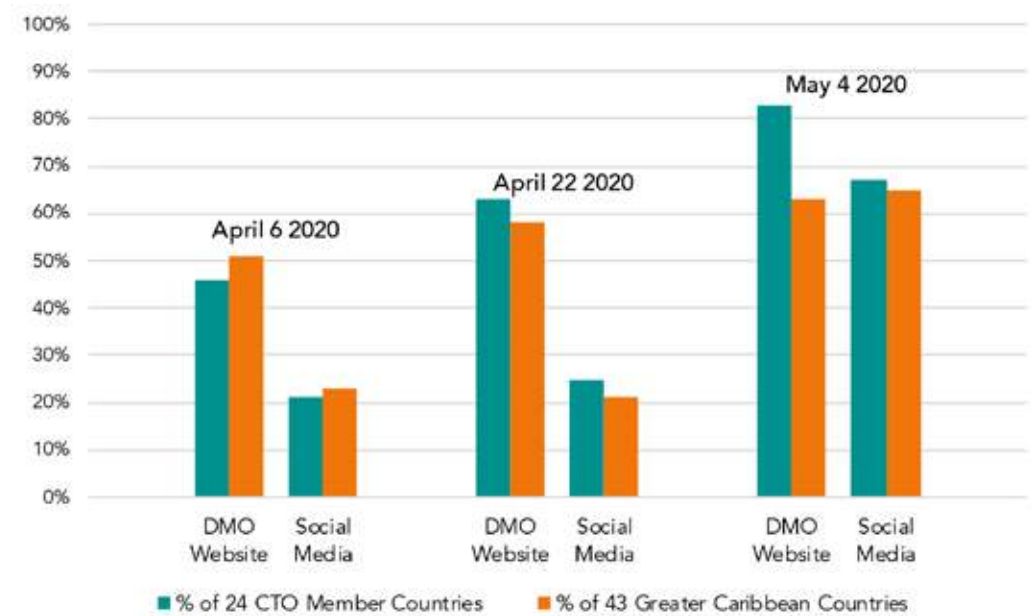


4 Crisis Communication

The GW IITS team assessed the level of responsiveness to COVID-19 displayed in destination organizations' communication efforts. The GW IITS team analysed both the consumer-facing marketing websites and the organizational websites (in particular those of tourism boards/authorities) of all nations in the Greater Caribbean.

Figure 7 shows the progression of COVID-19 communication efforts from early April through early May. In early April, 46% of CTO member countries were sharing COVID-19 related information on their marketing website, and 21% were doing so on their social media pages. By early May, 83% of CTO member countries were sharing this information on their websites and 67% were doing so on their social media channels.

Figure 7: COVID-19 Information Featured on Website and Social Media Channels



During this same time period, the percentage of countries in the Greater Caribbean (which includes CTO member states) displaying COVID-19 information on their marketing websites grew from 51% to 63%; social media sharing grew from 21% to 65%.

In general, most of the destination websites featured information on travel restrictions, border closures, airport or cruise port closures, flight information, information for stranded tourists, curfews, and new measures introduced to stem the transmission of COVID-19. The DOs conveyed information generated mainly from local and regional public health agencies and national crisis management committees. Information mostly took the form of press releases, official statements, news alerts and updates.

These results indicate that DOs improved their crisis communication responsiveness from April through to early May. The improved rate of information sharing suggests that DOs worked to develop a unified communication strategy that ensured consistency across all communication channels, such as their websites and social media—primarily Facebook.

“While the situation is unprecedented in our lifetimes, by evaluating the response of destination management and marketing organizations and tourism business owners, we can not only prepare for a sustainable recovery but adapt lessons learned to potential future waves of COVID-19, which we hope will be less severe.”

5 Destination Marketing

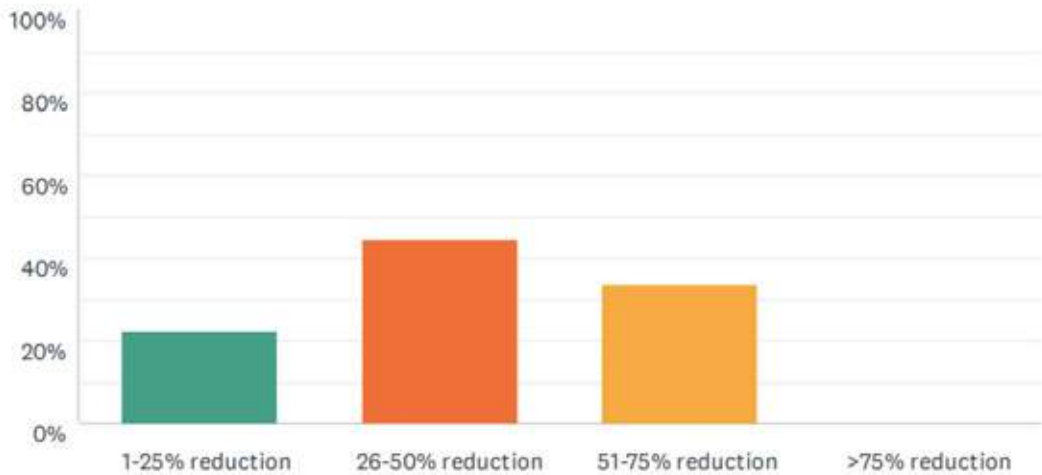
The survey findings showed that COVID-19 has resulted in dramatic reductions in marketing spend among CTO member countries.

Fifty per cent (50%) of respondents noted that they have reduced marketing spend. The other 50% noted that while they have not had to reduce their marketing spend, they are reallocating resources amongst existing and new strategies.

As shown in Figure 8, of the nine DOs that have had to reduce their marketing spend, 44% have reduced spend by 26%–50%, one-third reduced spend by 51%–75%, and 22% reduced spend by 25% or less.

Figure 8: By how much have you had to reduce your marketing spend due to the COVID-19 pandemic?

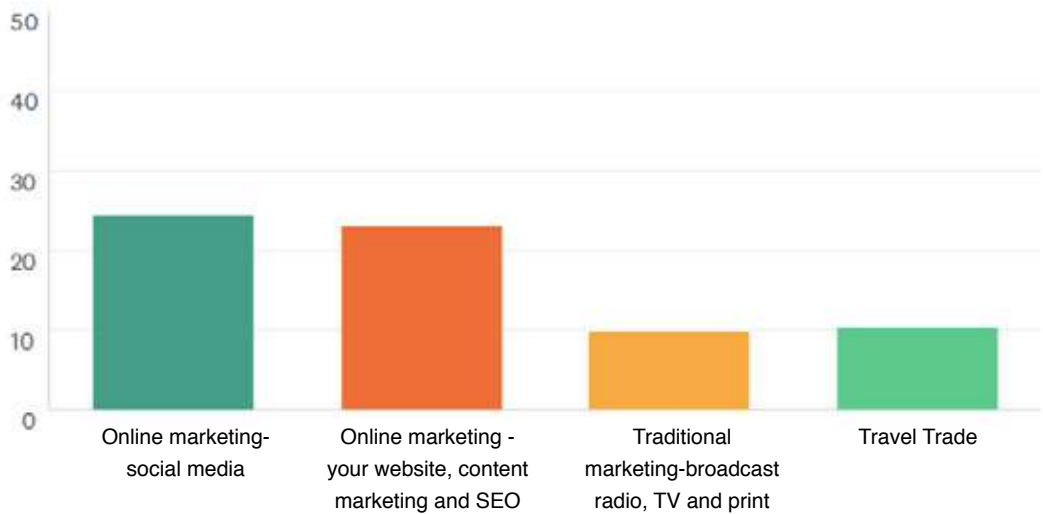
Number of Respondents: 9



Marketing budgets are allocated mostly to online marketing—primarily social media, followed by website updates, content marketing and SEO (Figure 9).

Figure 9: What percentage of your COVID-19 marketing spend is currently allocated to the following?

Number of Respondents: 18



Respondents listed their main communications and marketing priorities during the pandemic (in order of importance) as:

1. Maintaining brand presence;
2. Maintaining relationships with travel trade and other partners;
3. Providing up-to-date COVID-19 information and resources on their website and/or social media channels; and
4. Communicating a message of empathy.

In addition to the survey, the GW IITS team took stock of the marketing actions taken by destination organizations in the Greater Caribbean, including CTO member countries, as a result of COVID-19. The marketing response assessment timeframe was 6 April through 8 May 2020. Figure 10 shows the progression of these responses and actions taken over this period of time.

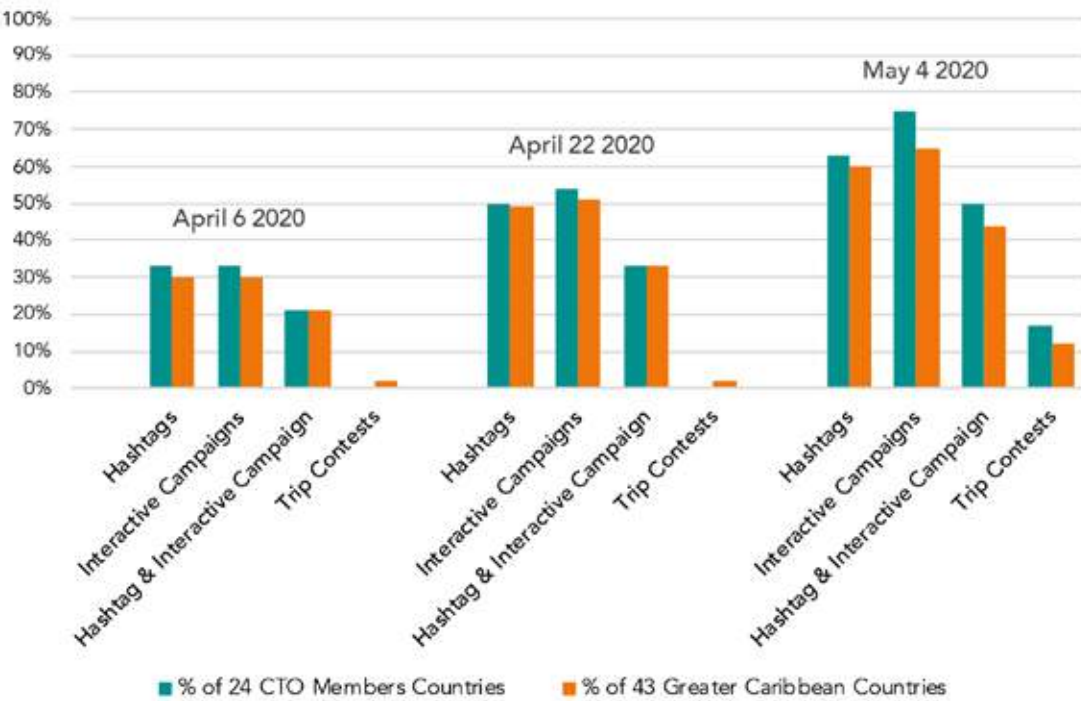
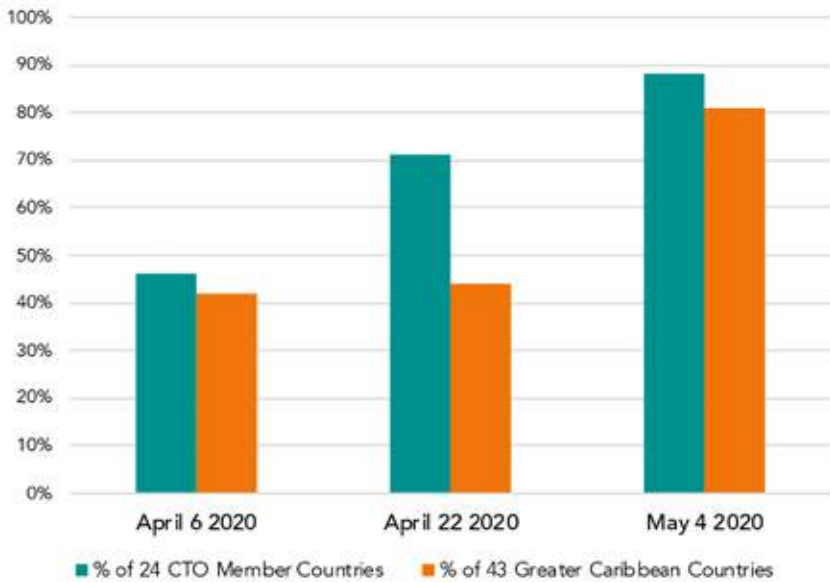
At the start of the assessment period in April, 46% of destination organizations in CTO member countries and 42% in the Greater Caribbean had some COVID-19 related marketing actions (see Figure 10). During this period, the primary marketing tool used by destination organizations was a simple hashtag that was designed to keep top of mind with travellers, such as #AnguillaFromAfar, #BelizeAwaits, #DreamingOfTobago or #SeeYouSoonNevis.

As the crisis progressed, DOs implemented interactive campaigns that engaged travellers through videos and virtual activities such as cocktail-making sessions and destination weddings, designed to encourage future travel.

By early May, 88% of CTO member countries had implemented specific COVID-19 marketing actions that included interactive campaigns and virtual vacations, and several destination organizations began to more aggressively promote travel by offering complimentary trips to contest winners (see Figure 10).

In the future, DOs will need to consider the level and speed of their marketing responses in times of global crisis. While organizations preferred to engage visitors through their social media channels rather than their websites, they will need to organize quickly to develop a marketing response to keep destinations front of mind for travellers.

Figure 10: Formal COVID-19 Marketing Campaigns and Types of Campaigns Implemented



6 Destination Management

The GW IITS team also took stock of the destination management and community support actions implemented by destination organizations during the crisis. Unfortunately, there was very limited information available on DOs websites and social media channels about their efforts in these areas.

Most actions focused on training (unemployed) tourism workers and providing support to medical front-line workers.
A few good practices are highlighted below.

Community support:

Saint Lucia: support Saint Lucia campaign button featured on the DO website, to provide COVID-19 relief for front-line workers

Jamaica: ‘Together We Stand’ telethon to support front-line workers

Barbados: ‘We Care Initiative’ to provide free staycation for front-line workers

Capacity-building support:

Jamaica: #upgradeyourself training programme campaign by the Ministry of Tourism

Belize: The Belize Tourism Board provided a comprehensive program of online training sessions for tourism workers



7 Economic Relief

Our team also assessed economic relief measures implemented by all 43 countries in the Greater Caribbean, including CTO’s 24 member states. The primary source of data for economic relief policies in the Caribbean came from the International Monetary Fund’s (IMF) online database, ‘Policy Responses to COVID-19: Policy Tracker’.² KPMG’s online reports of tax developments in response to the novel coronavirus were also reviewed for included Caribbean countries.³ If no country data was included in the IMF Policy Tracker or KPMG reports, the team analysed content from national government and bank websites, trade association press releases, and local and international media sites. Economic Relief Measures were grouped into twelve categories as seen in Table 1.

Table 1: COVID-19 Economic Relief Measures in Caribbean Countries

ECONOMIC RELIEF CATEGORY	DESCRIPTION
1. Unemployment Benefits	Increased or expanded unemployment benefits and social programmes for those impacted by COVID-19. Examples include increased allocation for unemployment insurance, expanded support mechanisms to include partially unemployed and self-employed, etc.
2. Job Protection	Providing incentives for job protection and retention. Examples include national paycheck/payroll protection programmes, providing wage subsidies, waiver of social security payments, tax credits, and so on to businesses that do not furlough employees, and other incentives for reducing employee working hours rather than conducting permanent staff reductions.
3. Loans or Credit Lines for Small and Medium Enterprises	Establishing new, favorable relief loans or lines of credit specifically for impacted businesses.
4. Cash Transfers	Implementing one-time or temporary cash transfers or stimulus check payments to impacted or most vulnerable segments and/or all citizens, in addition to expanded unemployment benefits/social programmes.
5. Food Programmes	Providing food vouchers, rations, packages, or programmes for vulnerable, affected, elderly and/or low-income groups.
6. Price Caps	Establishing a maximum price on basic consumption goods to prohibit and penalize price gouging. This includes freezing or capping prices or instituting price ceilings.
7. Public Utilities Support	Temporarily reducing or suspending value-added tax (VAT) on or payments for public services and/or utilities such as electricity, gas and water bills.
8. Tax Cuts/Deferrals	Providing a variety of tax cuts, tax refunds, deferred tax payments, and/or delayed tax collection to affected SMEs and employees. Also includes extending tax filing deadlines. Does not include tax credits for retaining employees.
9. Suspension of Tariffs/Duties	Temporarily suspending common external tariffs or instituting duty waivers/deferrals on medical supplies, sanitizers, food and other strategic health and essential imports.
10. Health Spending	Increased investment in health-related industries and increased spending on medical supplies to combat COVID-19.
11. Infrastructure Upgrades	Providing incentives and grants for renovations and construction to upgrade facilities and infrastructure during the pandemic.
12. International Financial Support	Receiving financial support from international financial institutions such as the Eastern Caribbean Currency Union (ECCU), International Monetary Fund (IMF), Inter-American Development Bank (IDB), World Bank, and other governments (Europe, US, etc.).

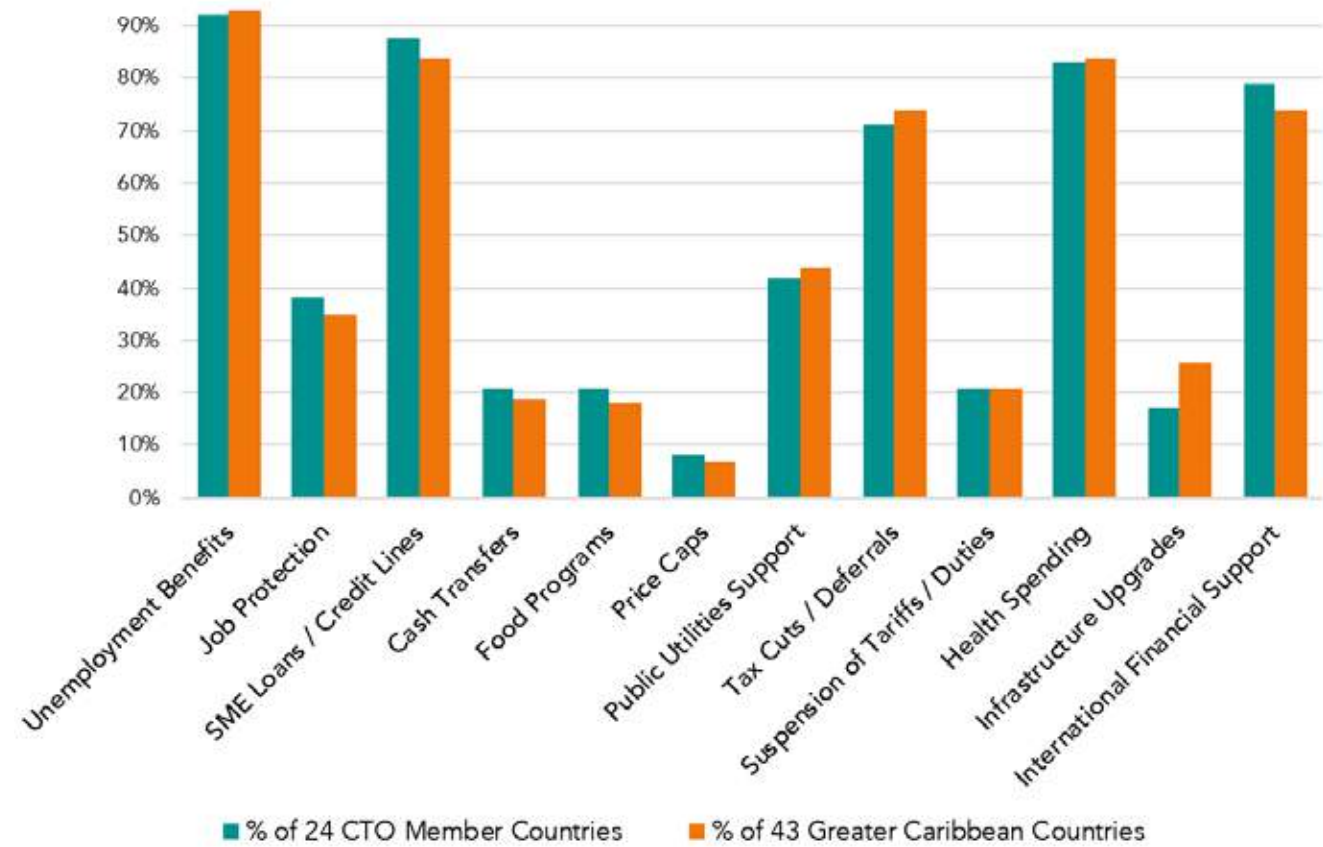
² <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19>

³ <https://home.kpmg/xx/en/home/insights/2020/04/taxnewsflash-coronavirus-covid-19-developments.html>

Figure 11 shows the percentage of CTO member countries that have implemented these twelve economic relief measures in comparison to the rest of the Greater Caribbean. The most widely used economic relief measure by Caribbean nations was unemployment benefits—increased or expanded unemployment benefits and social programmes for those impacted by COVID-19. Ninety-three per cent (93%) of countries in the Greater Caribbean expanded their unemployment benefits and other social programmes to stem the economic fallout from COVID-19.

Other economic relief practices instituted by the majority of Caribbean governments include providing more favorable loans and credit lines for affected small and medium enterprises (86%), increasing health spending (84%), implementing a range of business-related tax cuts and deferrals (74%), and receiving international financial aid (74%).

Figure 11: Economic Relief Measures in Response to COVID-19



Less widely implemented economic relief practices across the region include providing reduced rates or suspended payments for public utilities (44%), providing incentives or guidelines for job protection and retention (35%), providing incentives for upgrading infrastructure and facilities during the pandemic (26%), suspending tariffs and duties on essential imports (21%), providing one-time cash transfers or stimulus checks to affected citizens (19%), and providing some type of food programme (18%).

Only 7% of countries in the Greater Caribbean have implemented price caps on basic consumption goods. This was the least common of the eleven economic relief measures in this study, and may be a good practice to consider if countries are faced with shortages of essential goods, to keep basic necessities affordable for all.

Figure 12 provides a breakdown of the CTO member countries' most and least common economic relief measures implemented to mitigate the impacts of COVID-19.

Figure 12: Top Economic Relief Measures Implemented in CTO Member Countries

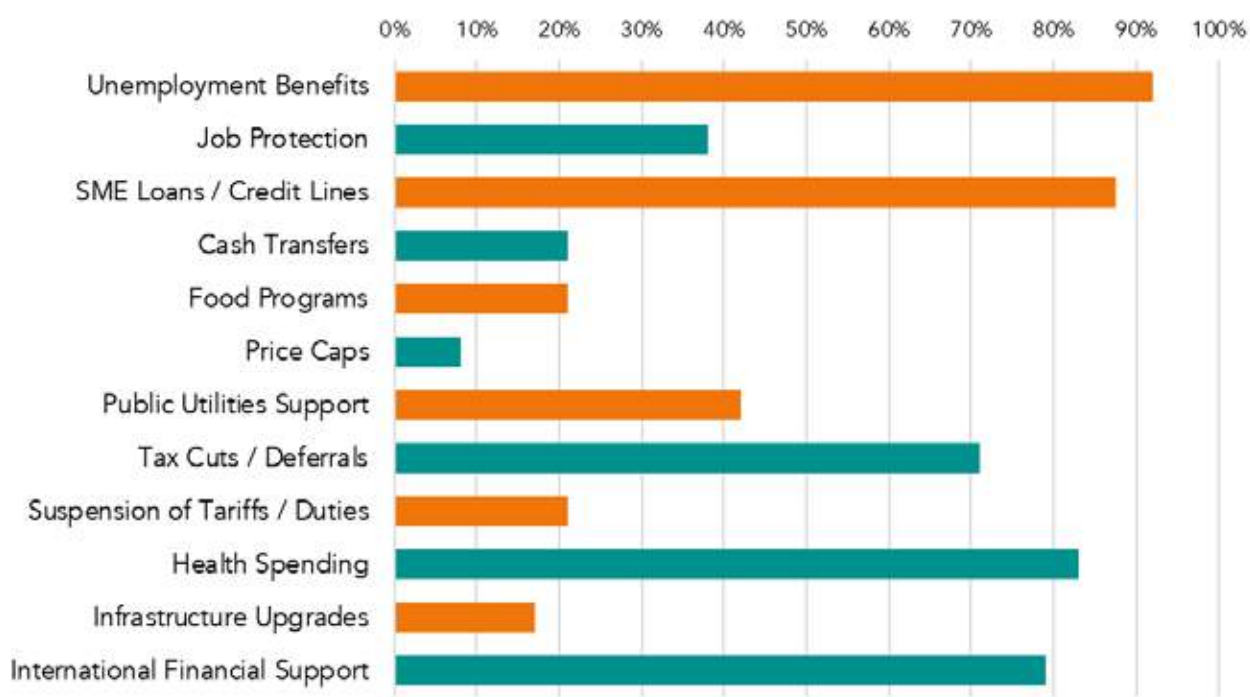
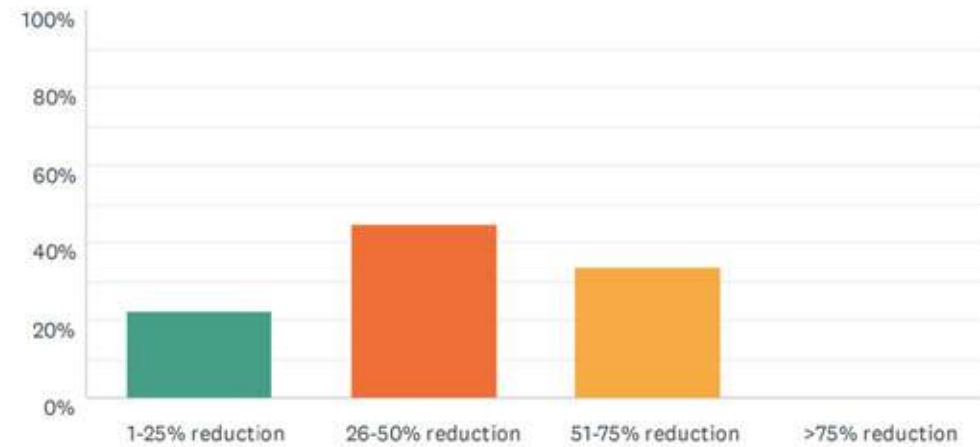


Figure 13: To what extent are you or your organization involved in working on the development of the government's economic responses to the pandemic?

Number of Respondents: 18



Two-thirds of survey respondents indicated they have been involved to a great extent in developing the government's economic response to the pandemic; and 22% of respondents have been involved to a moderate extent (Figure 13).

In general, many of these economic relief measures and policies are in effect only for the next 3–6 months, expiring by the end of August or September. It is evident that economic support for the tourism sector will be needed for much longer, as visitation numbers and consumer sentiment are estimated to remain low over the next 12–24 months. It is imperative that DOs continue to monitor the situation carefully and, together with tourism industry associations, advocate for continued support of tourism businesses to ensure their survival through 2021.

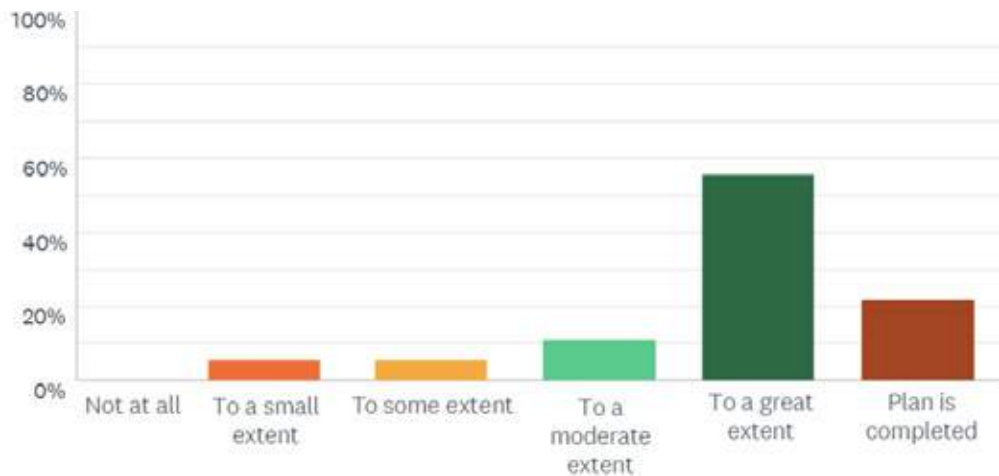


8 Recovery Planning

The majority of destination organizations have made good progress on their recovery planning efforts. As seen in Figure 14, 56% per cent of respondents indicated that they have begun to develop their recovery plan to a great extent, 22% of respondents stated that they have completed their recovery plan, and 11% indicated that they have begun to develop their recovery plan to a moderate extent.

Figure 14: Have you begun to develop a recovery plan?

Number of Respondents: 18



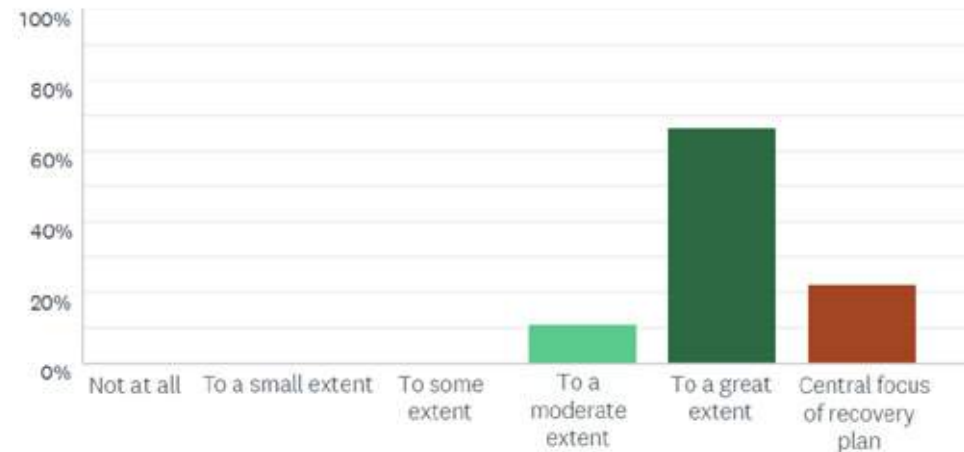
As part of the recovery planning, 39% of respondents are working to a moderate extent to identify resources for recovery across all government agencies, 33% are doing the same to a great extent, and 17% are doing so to a very great extent.

The areas that destination organizations consider important to include in their recovery plans are (in order of importance):

1. Maintaining brand presence;
2. Maintaining relationships with travel, trade and other partners;
3. Maintaining a connection with former visitors; and
4. Continuing to provide up-to-date COVID-19 information and resources on their website and social media channels.

Figure 15 indicates that 67% of respondents foresee integrating sustainability practices and/or initiatives into their recovery planning to a great extent, and another 22% of respondents see sustainability as a central focus of their recovery plans.

Figure 15: To what extent do you foresee integrating sustainability practices and/or initiatives into your recovery plan?
Number of Respondents: 18



These findings suggest that many CTO member countries are thinking of new ways to reset tourism in a more sustainable manner that will prioritize the well-being of host communities and protect the resources on which tourism is developed so as to ensure its long-term health.



CONCLUSION

The findings indicate that while many CTO member countries had a crisis plan that covered health crises, the existing plans have been only marginally useful in light of the scale and severity of this pandemic. This unprecedented crisis is challenging DOs to take an entirely new and unconventional approach to management, operations, and the guidance they provide to destination businesses. This crisis also calls for improved cooperation between DOs in the region to address shared challenges.

CTO member countries moved quickly and took bold actions to stem transmission of COVID-19 at the outset. As of early May, these measures have been effective at containing COVID-19 in the English-speaking Caribbean. Many countries are planning to reopen in July with new rules, including health and safety protocols for tourism. It will be important for DOs to roll out comprehensive programmes aligned with national guidelines, including training for tourism businesses and service providers, guidelines for keeping tourism workers healthy, and incentives for visitors to abide by protocols.

The main findings of the survey indicate that COVID-19 has affected the financial health of DOs. Nearly all DOs polled have had to cut, or foresee having to cut, their operating budgets. This is an ominous signal. Steps should be taken to advocate for financial support for DOs so that they remain strong and can help to lead tourism recovery and rebuilding efforts. DOs will have to find creative ways to do more with less, especially with regards to marketing. Moving forward, DOs will need to consider how to diversify their funding sources, which are mainly based on lodging and cruise taxes, to ensure that they can withstand future COVID-19 waves and future shocks to the tourism industry.

DOs will also need to remain vigilant and advocate for continued support to tourism businesses, since the study found that most short-term economic relief measures will expire over the next three months. Without sustained financial assistance, tourism businesses that are operating at less than full capacity will be challenged to remain in business through 2020.

Consumer confidence is the new currency. DOs will need to maintain the high level of integrated communications demonstrated during the early phase of the global pandemic. They will need to continue communicating current and accurate information about how their destinations are planning to ensure visitor health and safety.

While most DOs demonstrated few destination management and community support actions during the early phase of the pandemic, destination management is more important than ever in working towards tourism recovery. It is encouraging that the majority of DOs plan to integrate sustainability into their recovery plans; despite the severe disruption to businesses, destination managers are mindful of rebuilding tourism so that local communities benefit and natural and cultural assets are conserved for the long-term benefit of locals and visitors alike.

The background of the entire page is a photograph of a boat's bow on a body of water during sunset. The sun is low on the horizon, creating a warm, golden glow and reflecting on the water's surface. A coiled rope is visible on the boat's deck in the foreground.

ANNEX: LIST OF COUNTRIES

24 CTO Member Countries:

- Anguilla
- Antigua & Barbuda
- Bahamas
- Barbados
- Belize
- British Virgin Islands
- Cayman Islands
- Curacao
- Dominica
- Grenada
- Guyana
- Haiti
- Jamaica
- Martinique
- Montserrat
- Puerto Rico
- St. Eustatius
- St. Kitts & Nevis
- Saint Lucia
- Sint Maarten
- Saint Martin
- St. Vincent & the Grenadines
- Trinidad & Tobago
- Turks & Caicos Islands

43 Greater Caribbean Countries:

- **All 24 CTO member countries**
- Aruba
- Bermuda
- Bonaire
- Colombia
- Costa Rica
- Cuba
- Dominican Republic
- French Guiana
- Guadeloupe
- Guatemala
- Honduras
- Mexico
- Nicaragua
- Panama
- Saba
- Saint Barthélemy
- Suriname
- US Virgin Islands
- Venezuela



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