

# Domestic Tourism for COVID-19 Recovery: In Focus

Tue, 05 Oct 2021

**Presented by**

Trevor Weltman - Partner  
Clickable Impact Consulting Group

# Agenda

- Part I: Context and Impact
- Part II: Emerging Strategies and Approach to the 15th ETP
- Part III: Inspiration



# About me



## Clickable Impact Consulting Group

### Overview

Clickable is a strategic interdisciplinary consultancy committed to the Sustainable Development Goals. Based in Hanoi, and with a presence in Bangkok, we believe real impact comes when accomplished consultants with diverse talents coalesce around a goal to address sustainable development. We are united by our belief that everyone in the Asia Pacific should benefit from the region's extraordinary social and economic development. We share a passion for building a resilient Asia Pacific that is equipped to adapt to a changing climate while safeguarding the environment.

### Past and current clients





**Trevor Weltman**  
Partner and Lead Consultant

## Trevor Weltman

### Partner and Lead Consultant

Based in Bangkok, Trevor is a Partner at Clickable. He is a principal consultant, project manager, and strategist for multiple development projects with extensive knowledge of sustainable development and communications across the public and private sectors. He was most recently the COO of the Pacific Asia Travel Association (PATA) before joining Clickable in 2020. During his time at PATA, Trevor spearheaded the donor-funded PATA Crisis Resource Center (CRC) facility, the first-ever resource of its kind to coordinate travel and tourism's region-wide management and recovery from COVID-19. More recently, he has been contributing author of a forthcoming publication for ADB/UNWTO on *Big Data for Better Tourism Policy, Management, and the Sustainable Recovery from COVID-19*, and is helping national tourism ministries attract international development finance for sustainable and bankable urban infrastructure in secondary cities.



**What is our goal?**



What is our goal?

## What is our goal?



### ETP Theme

- “**Domestic Tourism as the National and International Long-term Tourism Strategy**”, which aims to identify tourism policies and initiatives that promote domestic demand and expand supply for services in accord with SDGs.”



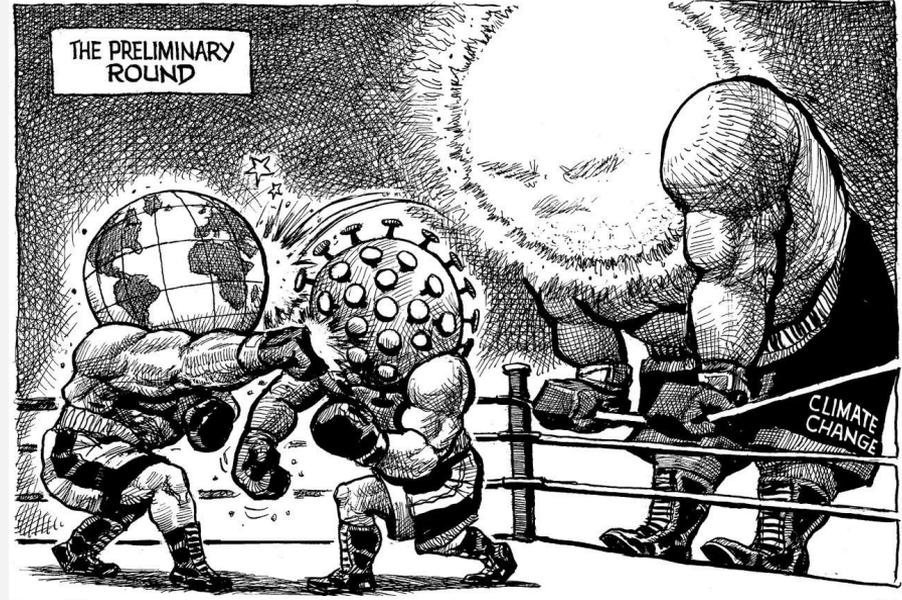
### Our goal is not only:

- Recover economically
- Open borders
- Facilitate trade and passenger flows



### Build a more resilient tourism industry

- Leverage domestic tourism for a quicker and more stable recovery
- Create balance in our markets more insulated from shocks
- Place proper emphasis on the social, cultural, and environmental impacts of domestic tourism



Source: [Economist, 2020](#)



# Part I: Context and Impact



## Global Domestic Tourism Pre-COVID-19

9

billion  
domestic  
tourist trips

6x

times larger  
than international tourism

≥70%

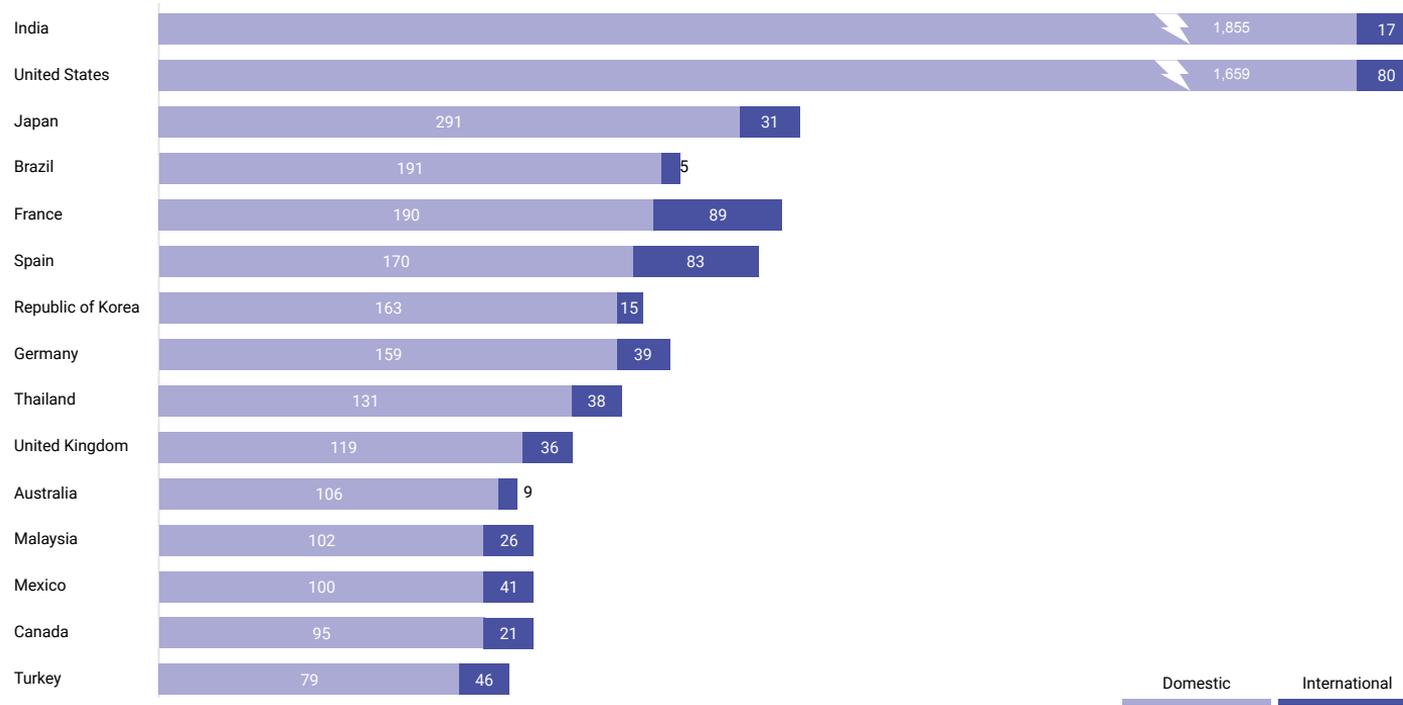
share of domestic trips  
(vs. international  
arrivals) in 33  
out of 73 countries

75%

of total tourism  
expenditure  
in OECD countries



## Domestic tourist trips and international tourist arrivals (millions) 2018



Source: [UNWTO](#)



## COVID-19: A Global Phenomenon

### Speed

COVID-19 moved from an initial local problem to a global health crisis in less than a month and continues to outpace estimates



### Scope

The effect of the pandemic has been unprecedented and has impacted economies, businesses and society at every level



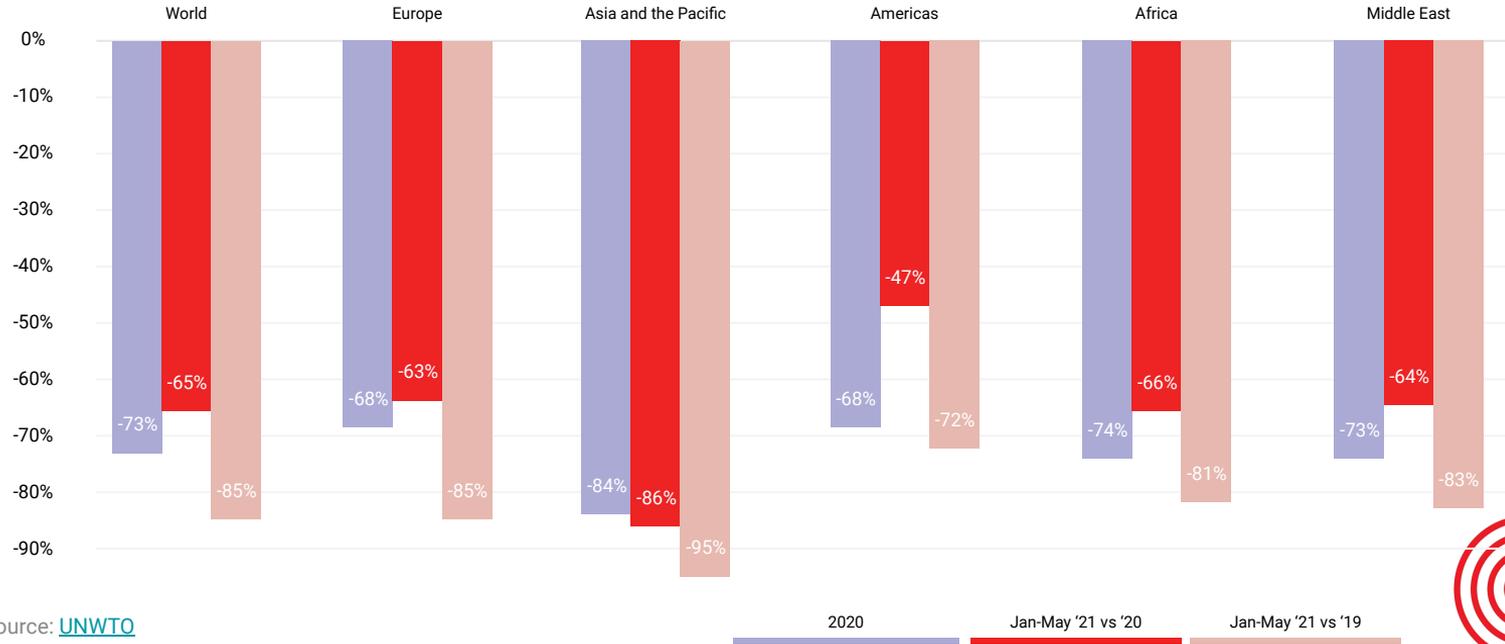
### Scale

With cases from the poorest people on earth to Leaders of Nations, there is now almost no human in earth that has not been touched by the crisis



# Global Tourism COVID-19 Impact: International Down 88%

International Tourist Arrivals, % change



Source: [UNWTO](#)

## Taking Stock: Impact of COVID-19 on Travel

- There has never been a crisis like this before
- Nobody was adequately prepared
- Our sector effectively shut down for a period of time and has yet to fully restart
- UNWTO projects over 100 Million jobs at risk
- Financial losses still mounting
- Huge impact on personal wealth and disposable income for travel in most markets
- **Restructure is inevitable - must get ahead of and plan for it**

Source: [UNWTO](#), [PATA Crisis Resource Center](#)



# Global Tourism COVID-19 Impact: Domestic Down but showing signs of recovery

**Domestic Travel Recovery Across Asia** (1 to 31 May 2021 vs 2019, % of 2019's level)



Source: [ForwardKeys](#)

## Arrival Volumes (% of 2019)

- 50% and more
- 20% - 50%
- Below 20%



Arrivals from 1 May to 31 May 2021 vs same period in 2019.



Only considered pax staying at least 1 night at destinations



Source: ForwardKeys Air Ticket Data



## Benefits of Domestic Tourism as Recovery Strategy

- Short-term: capture and divert pent-up demand to support ailing trade and tourism jobs
- Long-term: **create structural change to tourism industry** that focuses on building greater industry resilience and sustainable impacts



# Part II: Emerging Strategies and Approach to the 15th ETP



## Strategy is not:

- Waiting for global policies or vaccines
- Creating multiple levels of discussion that works to multiple schedules
- **Trying to market our way out of this**
- Handing the crisis to an agency
- Letting the failing trade overly influence decisions
- Trying resume 2019 plans now that vaccines are in play



## Emerging Strategies for Domestic Recovery

### Destination Management



COVID-19  
Containment



Financial  
Incentives

### Private Sector Engagement



Product  
Development



Partnerships

### Digitalization



Market  
Intelligence



Capacity Building  
and Training



## Emerging Strategies: Destination Management & Policy

### Destination Management



COVID-19  
Containment



Financial  
Incentives

- What are the most significant challenges to managing destinations at this time?
- What specific rules or regulations, plans or strategic documents are guiding destination managers at this time? What objectives, implementation mechanisms, financing structures and impact measurements support them?
- Are local communities prepared to welcome tourism/are they engaged in tourism development? If not, what kinds of engagement or capacity development can support?



## Emerging Strategies: Private Sector Engagement

### Private Sector Engagement



Product  
Development



Partnerships

- How to better engage the private sector involved in destination governance efficiently? In which capacities or institutions?
- What are the greatest challenges for engaging the private sector to foster domestic tourism?
- What national, provincial, or municipal programmes exist to support the private sector (e.g. labels, quality seals, training programmes, etc.)?
- What are the main challenges for the private sector to develop new products and put them on the market?
- What are proven models of governance structure in rural areas that supports private sector and domestic tourism recovery (existence of Destination Management Organizations, etc.)?



## Emerging Strategies: Innovation and Digitalization



- What technologies are being used to foster domestic demand?
- What fields are most suitable for the use of Innovation to develop domestic tourism: communications, customer segmentation, product development, post-sales services, etc.?
- What policies, programmes, and investments are needed to accelerate digital transformation in rural areas: skills, internet access, mentoring, financial support, etc.?
- What are some major successes? What are still the major challenges?
- How are tourism authorities contributing to easier and more efficient sales channels for domestic travel?



## Key questions answered by end of the programme

1.

What is the short-term and long-term importance of focusing on domestic tourism?

2.

What are key policies and programmes being implemented around the region to unlock greater domestic support?

3.

What private sector engagement strategies need to be enacted to better engage the trade in governance and product development, as well as catalyzing investment?

4.

What digitalization initiatives and capacity development support would have the greatest impact on the trade at this time?



# Part III: Inspiration



## Strategy is not:

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## Subnational Viral Campaign: “Sit at a distance, stand as one.”



Papatūānuku (our earth mother) is Breathing



## New Zealand's Response

- Hard pivot to domestic
- New branding (not “100% Pure New Zealand”)
- [Centralizing information for Domestic](#)
- [Commissioned custom domestic sentiment analyses](#)
- [Commissioned custom domestic big data and market research](#)
- [Digitalization capacity development](#)
- And many more initiatives resulting in a rebounding domestic market during times of COVID containment

Source: [Stuff](#), [TNZ \(1\)](#), [TNZ \(2\)](#)

### Do Something New, New Zealand!

22 May 2020

Always wanted to see a Kiwi in the wild, go blackwater rafting or hit the slopes with the family? Why wait?



© UNW



## Viral Domestic Campaign: “Do Something New, New Zealand”



Around every corner there is something  
stunning happening and it's unique.

#DoSomethingNewNZ

Do Something New New Zealand



# Conclusion



Conclusion

## Taking Stock: Impact of COVID-19 on Travel

- There has never been a crisis like this before
- Nobody was adequately prepared
- Our sector effectively shut down for a period of time and has yet to fully restart
- UNWTO projects over 100 Million jobs at risk
- Financial losses still mounting
- Consumer Spending and Traveller Confidence eroded to an all time low
- Huge impact on personal wealth and disposable income for travel in most markets
- **Restructure is inevitable - must get ahead of and plan for it**

Source: [UNWTO](#), [PATA Crisis Resource Center](#)



Conclusion

## Benefits of Domestic Tourism as Recovery Strategy

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- Long-term: **create structural change to tourism industry** that focuses on building greater industry resilience and sustainable impacts





# Thank You



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