

x.

The “New Normal” you say ... Really?

X. Rebuild | Dec 2, 2020 4:45 PM CET

A large crowd of people is gathered at a water park festival at night. In the background, there are several water slides and a large structure with a blue and yellow slide. The crowd is dense, and many people are wearing swimwear. The scene is illuminated by artificial lights, creating a vibrant atmosphere. The text "Wuhan before Covid19" is overlaid in the center of the image.

Wuhan before Covid19

July 2019 Water Park Festival

A large, dense crowd of people, mostly young adults, is gathered at a water park festival. Many are wearing colorful life jackets (red, yellow, and blue). The scene is filled with people of various ages and ethnicities, some looking towards the camera, others engaged in conversation or activities. The background is slightly blurred, emphasizing the sheer number of people. The overall atmosphere appears festive and crowded.

The “New Normal” in Wuhan...

July 2020 Water Park Festival

What we live (and measure) today is **certainly NEW...**



... but definitely NOT NORMAL!

**DEFINING A “NEXT NEW NORMAL” TODAY
WHILE THE MARKET CONDITIONS ARE NOT NORMAL
IS A VERY RISKY BET...**

**TRAVELERS CURRENTLY ADAPT
THEY DO NOT NECESSERALLY CHANGE**

A SUDDEN ENTHUSIASM FOR DOMESTIC TRAVEL ... REALLY?

2 HOURS TRAIN/DRIVE FROM HOME



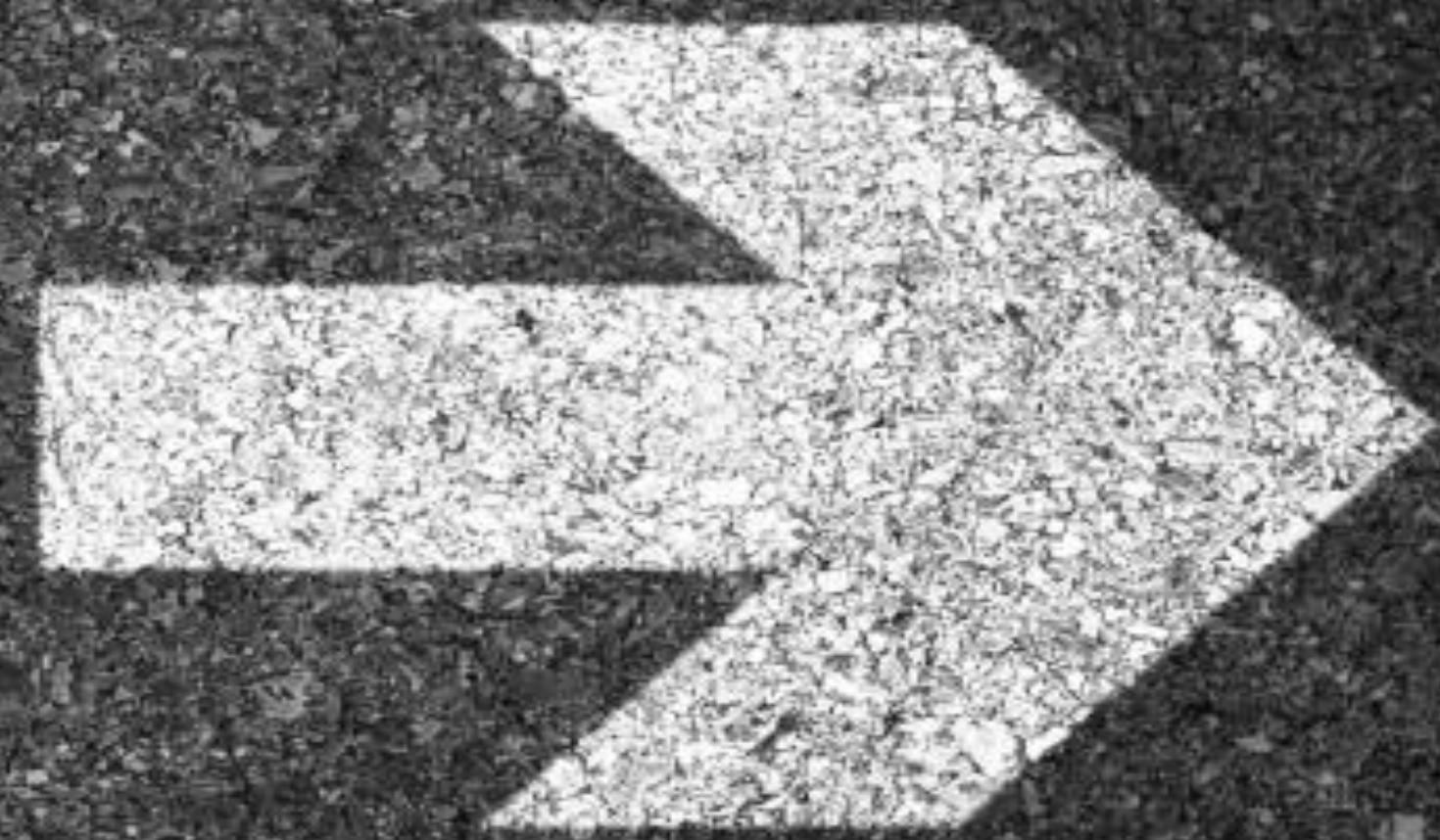
8 HOURS FLIGHT FROM HOME



TODAY PEOPLE VISIT **PLACES THEY CAN GO**

TOMORROW THEY WILL VISIT AGAIN **PLACES THEY WANT TO GO**

RE-INVENTING A "NEW NORMAL" TOURISM IS EXCITING BUT...




... A FEW TACTICAL CHOICES CAN PAY BACK QUICKER!

1. "Playing" with the Sentiment (data)
2. Delivering experiences visitors expect today
3. Engaging with the faces of your destinations



“Playing” with the sentiment (data)

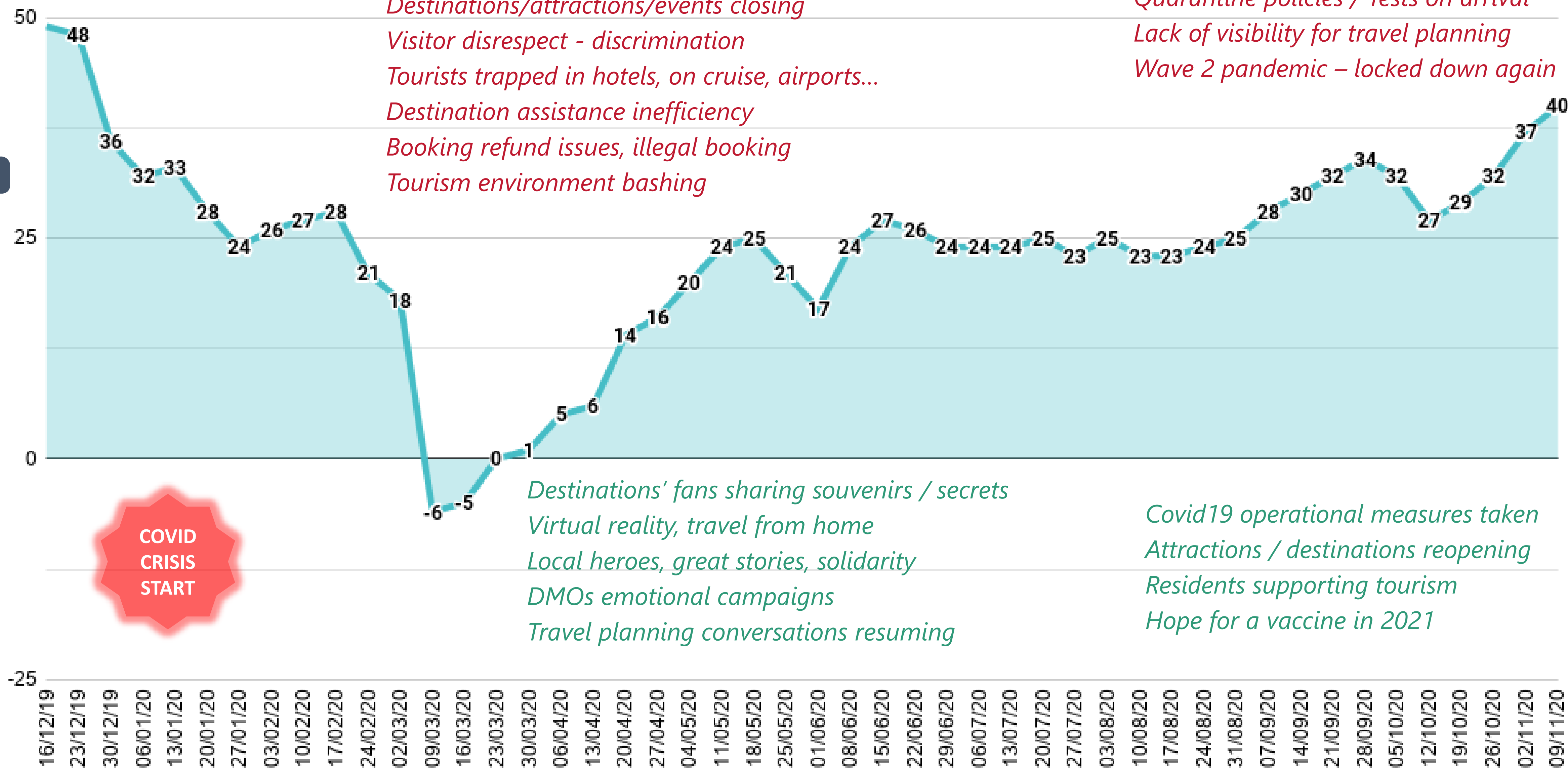


Following Travelsat “sentiment” data measure the state and dynamic of destinations’ and travel brands’ e-reputation built from global web social conversations “at large”, shared by medias, consumers, companies, citizens, brands and officials. Sentiment is not predictive alone of travelers’ planning, BUT a positive e-reputation is essential to generate favorability towards destinations and travel brands, particularly in post-crisis management context.

Destinations = clusters/epicenters
Tourists = covid19 super spreaders
"Brutal" travel bans
Destinations/attractions/events closing
Visitor disrespect - discrimination
Tourists trapped in hotels, on cruise, airports...
Destination assistance inefficiency
Booking refund issues, illegal booking
Tourism environment bashing

Deceptive new visitor experience
Quarantine policies / Tests on arrival
Lack of visibility for travel planning
Wave 2 pandemic – locked down again

Net Sentiment Score



COVID CRISIS START

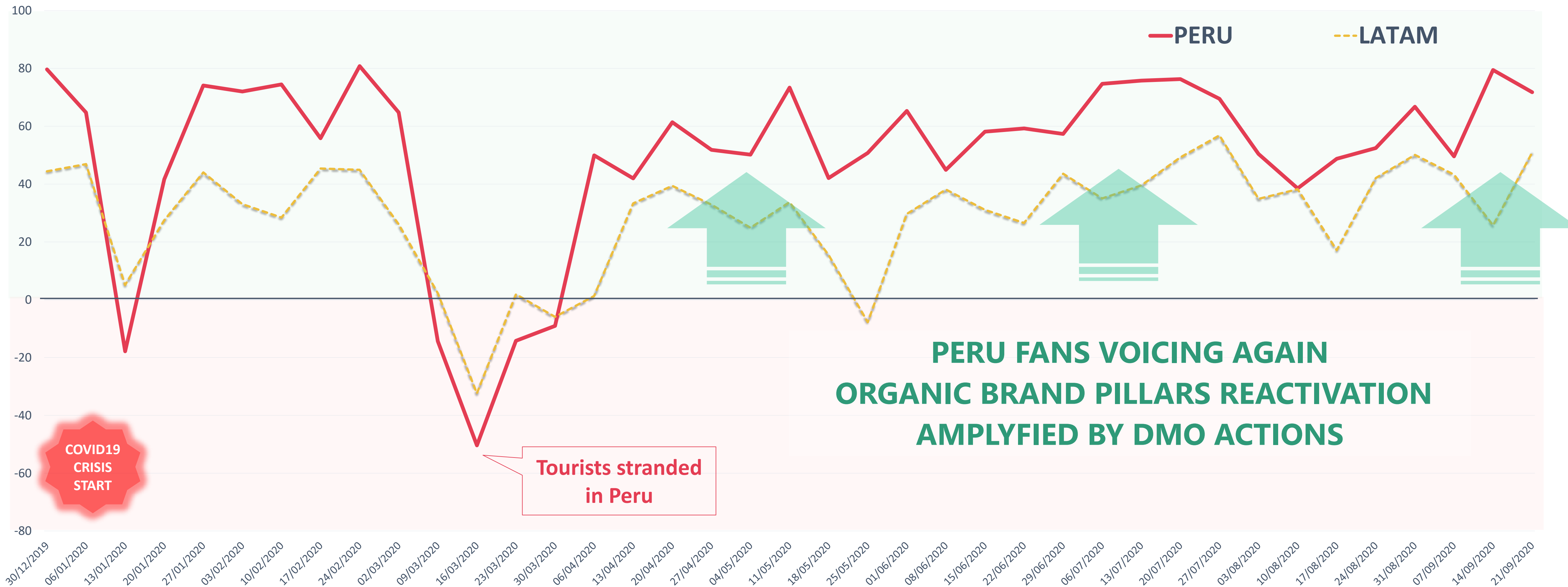
Destinations' fans sharing souvenirs / secrets
Virtual reality, travel from home
Local heroes, great stories, solidarity
DMOs emotional campaigns
Travel planning conversations resuming

Covid19 operational measures taken
Attractions / destinations reopening
Residents supporting tourism
Hope for a vaccine in 2021

Peru vs Regional Competitors

NET SENTIMENT INDEX

The Net Sentiment Index measures the polarity of verticals specific web social conversations (%positive - %negative)





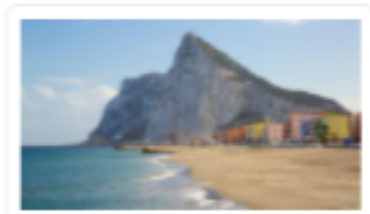
Mariana Konsolos @MarianaKonsolos shared an image



When you get an opportunity to **travel** to **Peru**, go for it! It's a beautiful country to get lost in, to connect with other **people**, to find yourself. Peru isn't just a destination. It's an experience! #sayyes #outofthebox #marianakonsolos pic.twitter.com/9L5GTw8Wqo

published on 17/09/20 at 16:05 | Twitter | Canada | twitter.com

Peru's Gateway To The Amazon! A Trip To Iquitos! #Wanderlust! Four Amazing...



johnriber created a post
...this exactly how you'd imagine **traveling** through the Amazon? Iquitos is in the north-eastern region of **Peru** and is the largest city in the world that cannot be accessed by road – **travel** to the city is only possible via flight or river boat. I...

published on 17/09/20 at 16:43 | Blogs | Japan | johnriber.com

Zac Efron Explores Iquitos with His Netflix Show Down to Earth



traveling and living in peru created a post
Cover photo: Netflix Down to Earth La entrada Zac Efron Explores Iquitos with His Netflix Show Down to Earth se publicó primero en **Traveling** and Living in **Peru**.

published on 09/09/20 at 23:40 | Blogs | United States | www.livinginperu.com

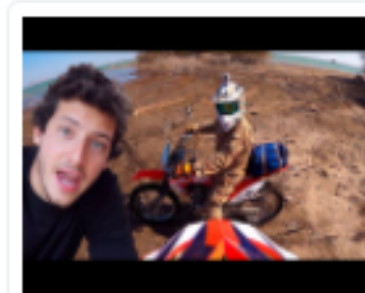
Visit Peru JP @VisitPeruJP shared a link



A gift campaign is currently being held at "Visit **Peru** JP", which is a **trip** to Peru . Follow @VisitPeruJP , select #Ja impression on the site, and complete the application at RT visitperu.jp/cpn/ Still more in time you'll Tsu # **Peru**!?

published on 14/09/20 at 13:00 | Twitter | Japan | twitter.com

El Perú NO solo es Comida // Perú en Moto



El Descocao shared a video
Amigos en este video fuimos de **viaje** a la Represa de Poechos, recorrimos todo el trayecto en moto y fue alucinante. Lugar: Poechos, Lancones, Piura- **Perú** ...

published on 15/09/20 at 04:20 | YouTube | Spain | youtube.com

How To Visit The Best Places In Peru While Working On A Budget



Vernon Mason created a post
...budget, **traveling** can seem like a challenge. Thankfully, **traveling** to **Peru** on a budget is very doable. When **traveling** on a ... places in **Peru** while working on a budget: 1. Do Some Research One great way to save money when you **travel** to **Peru** is to do...

published one hour ago | Blogs | United States | www.budgetyourtrip.com

Incredible Cycling Destinations in the World



Cycling Today created a post
...vineyards. Inca Trail, **Peru** South America, in itself, is a great place to try to **travel** on a bike. There are so many... This is the place with watercolor landscapes. To cycle, there is like **traveling** to a different dimension. The scenery there...

published on 26/09/20 at 21:04 | Blogs | Austria | cycling.today

The Soul Food of Black Peru



nico vera created a post
...in slavery, the food of Afro-Peruvians is an integral part of **Peru**'s culinary identity. Millions of **tourists** **travel** to **Peru** every year to eat. The draw is Lima's unique comida criolla (creole cuisine)—the 500-year fusion of Andean, Spanish...

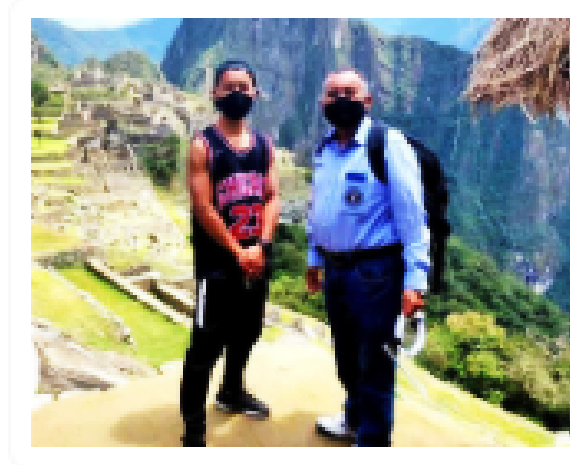
published on 08/09/20 at 10:00 | Blogs | United States | www.tastecooking.com

From "Prisoner" to "VIP" Treatment!

Boosting a positive sentiment on most "damaged" destination reputation facets



Goodable @Goodable shared an image



In March, a Japanese **tourist** flew to **Peru**, with plans to see Machu Picchu. Two days later, the lockdown hit. He had to cancel his plans and ended up spending seven months stuck inside the country. This week, tourism officials opened up all of Machu Picchu just for him.

pic.twitter.com/nBIHVRV51

published on 13/10/20 at 02:31 | Twitter | Canada | twitter.com

-45

Peru Net
Sentiment

Peru Net
Sentiment

+82

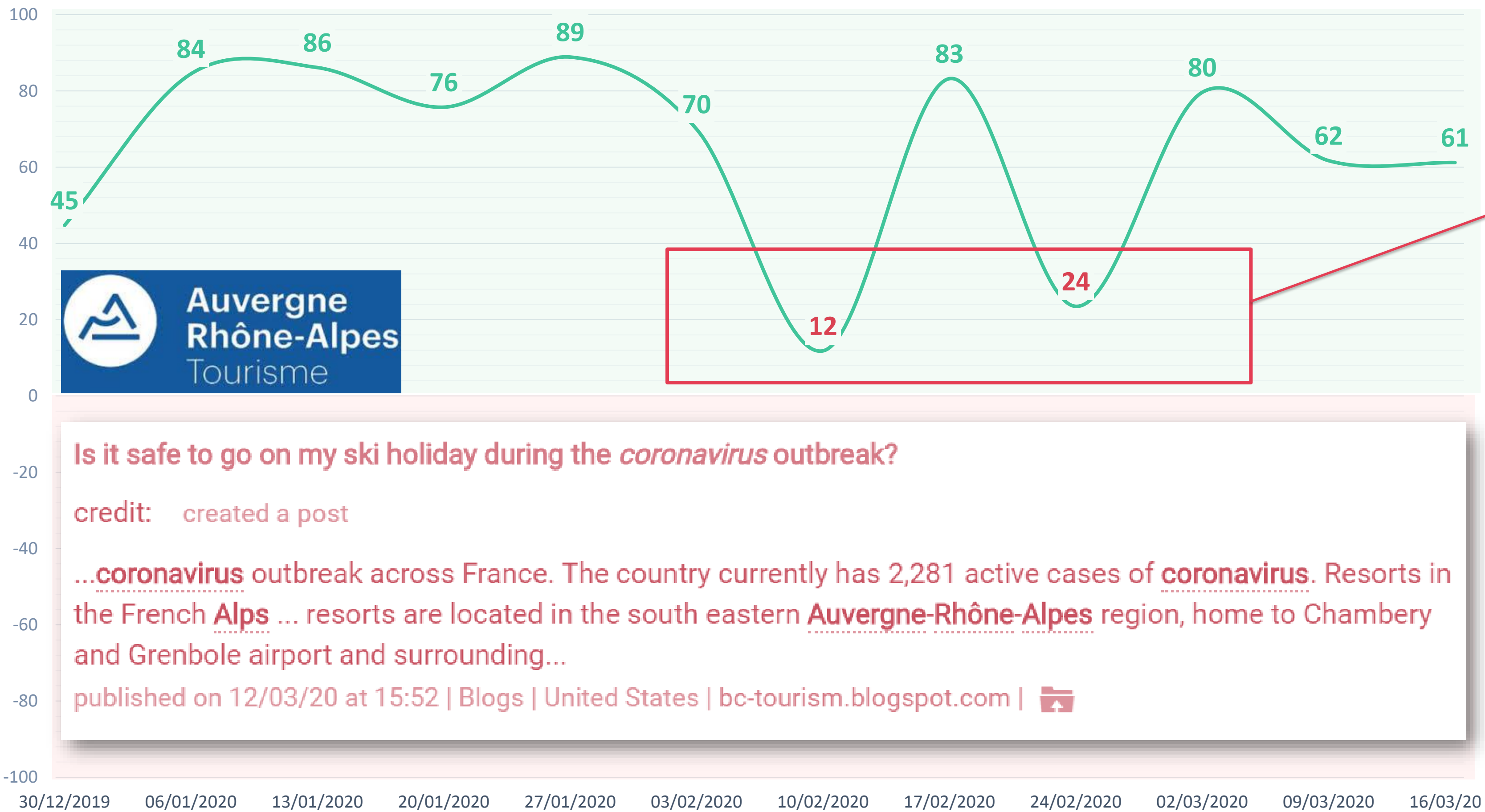
British tourists stuck in Peru to be rescued next week



danielle cook created a post

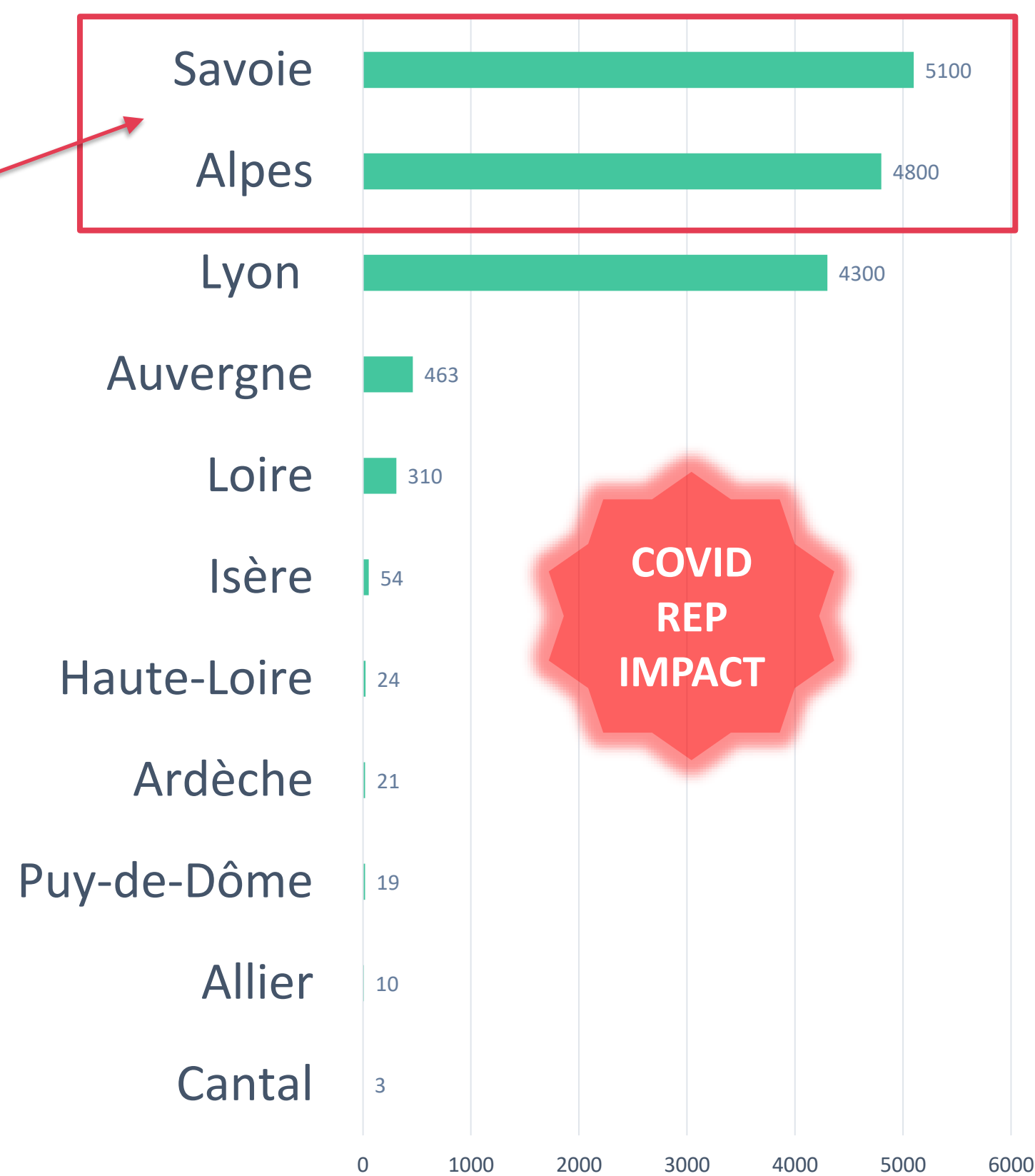
...to bring back **hundreds of British tourists stranded in Peru** will begin next week, the Foreign Office has said. Around 400... The couple and nine others, including Dutch and Canadian **travellers**, had gone to **Peru** to see the mountain Machu Picchu...

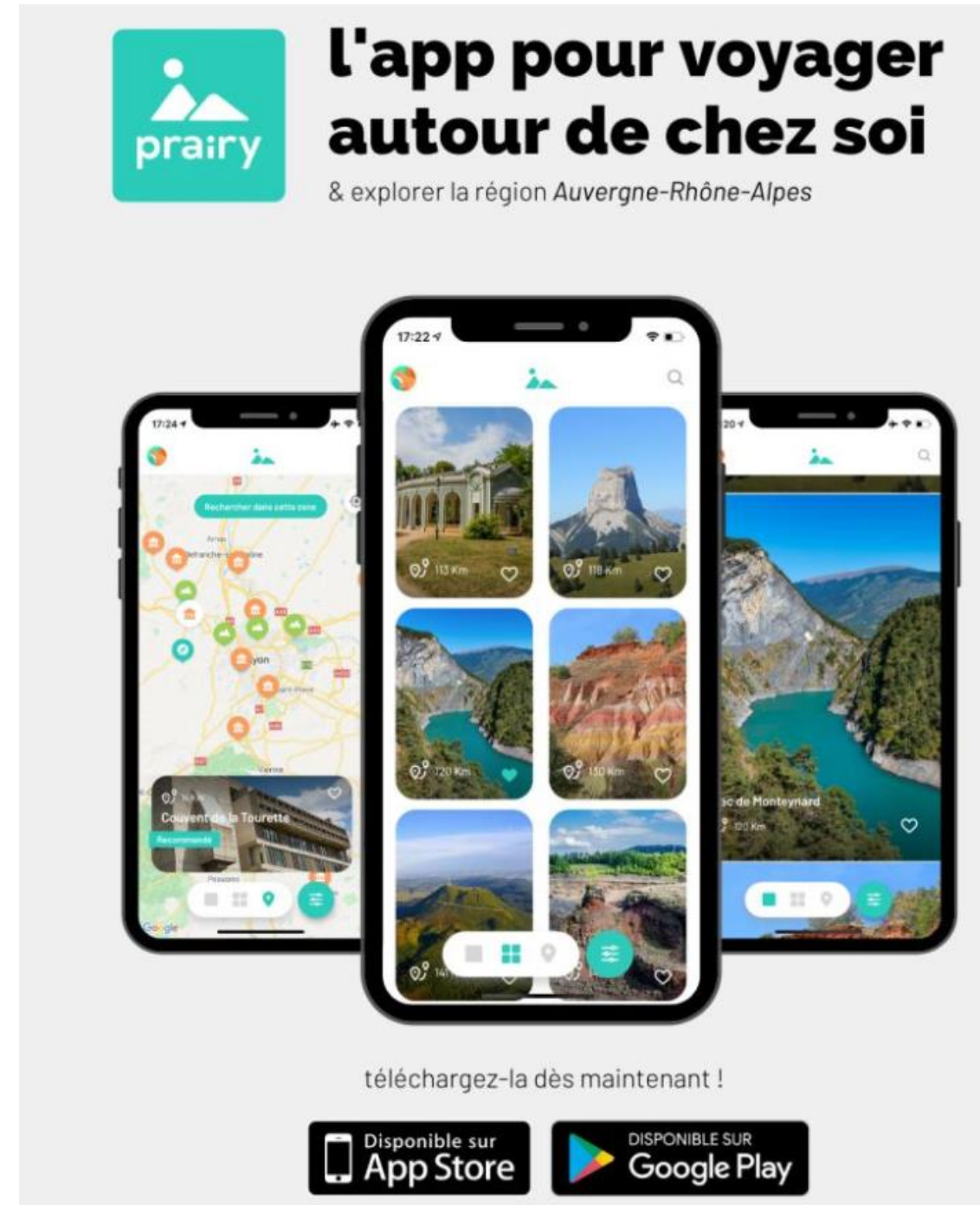
Destination Net Sentiment Index (*)



COVID TERRITORIAL REPUTATION IMPACT

Incidence of COVID-19 in the total destination-related social web conversations



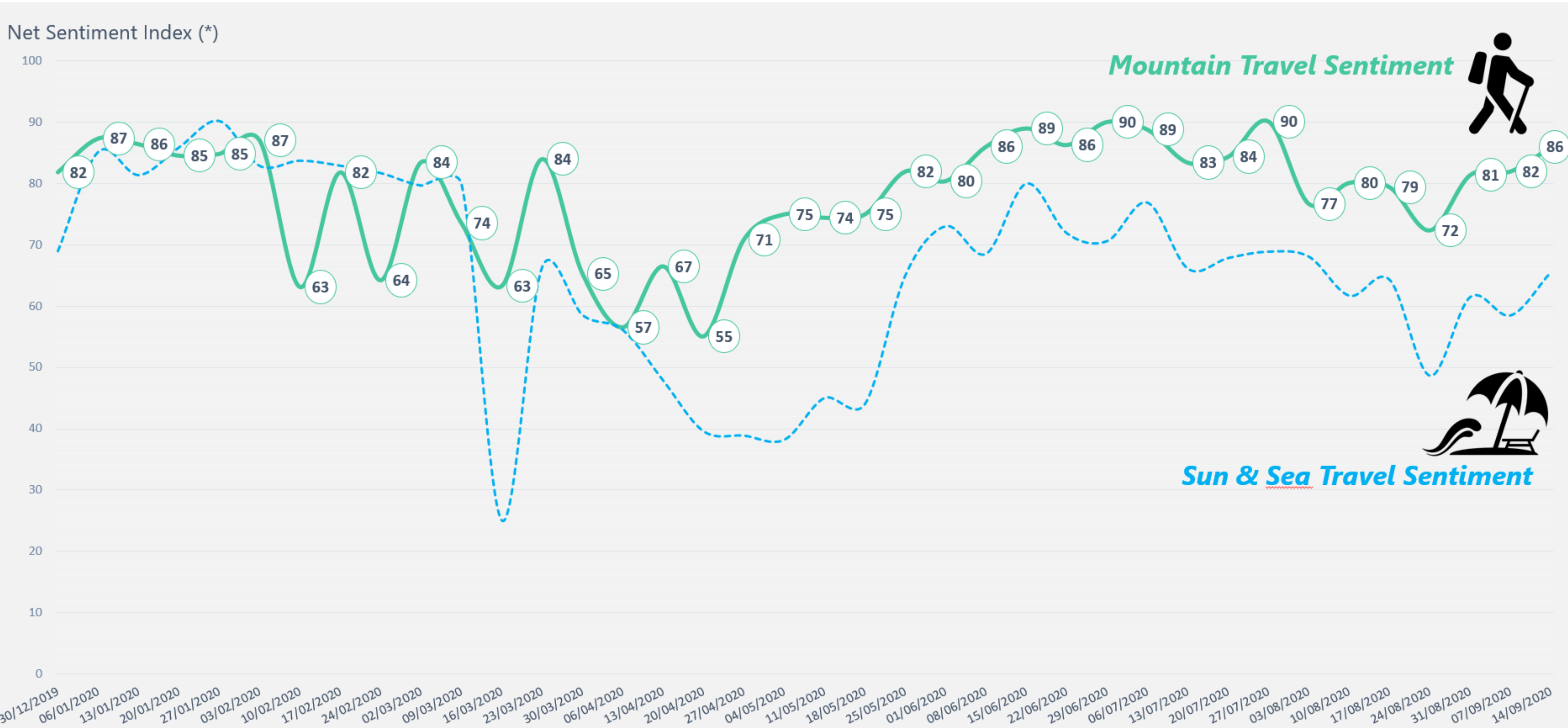


- New “Reviving” **DMO campaign**
- **Club Med optimism** shared for mountain tourism
- **Celebrities** sharing **best memories of ski holidays in France**
- **Anonymous fan’s video** of “Free-riding at home in the Alps” getting viral
- First **sanitary safety label** in a ski resort SafeGard
- New app for locals to **rediscover/share mountain adventures**
-



Healing the entire Mountain Travel Segment!

NET SENTIMENT SCORE – MOUNTAIN vs SUN & SEA (French Market)



2. The “Next Normal” Visitor Experience ... Really?






The Visitor Experience Factor

**Yesterday, 4 in 10 visitors
booked their destinations
based on relatives'
experiences**

**Today, 4 in 10 planners do not
book as they have concern about
“not leaving the full experience”**

A background graphic consisting of several overlapping lines in red, teal, and blue, set against a dark blue gradient background. The lines appear to be part of a data visualization, with one prominent red line showing a sharp downward trend.

**Visitor satisfaction
Has dropped vs pre-covid
in 2 in 3 reopening Destinations
(Travelsat 2020)**

Instead of pondering hypothetical

“Next normal” visitor needs,

deliver what actual visitors expect today!

travelsat

Hoteliers.com

priceline

zoover



Guests' Comments
From 30+ Review Websites

travelsat

Recently heard ...

velocity

cheapTickets



Tripadvisor

booking.com

Google

GET YOUR GUIDE



HRS

stminute.com



airbnb

yelp

okers

goibibo.com



thefork
a Tripadvisor company

edia



Camping2be



Hotel Specials

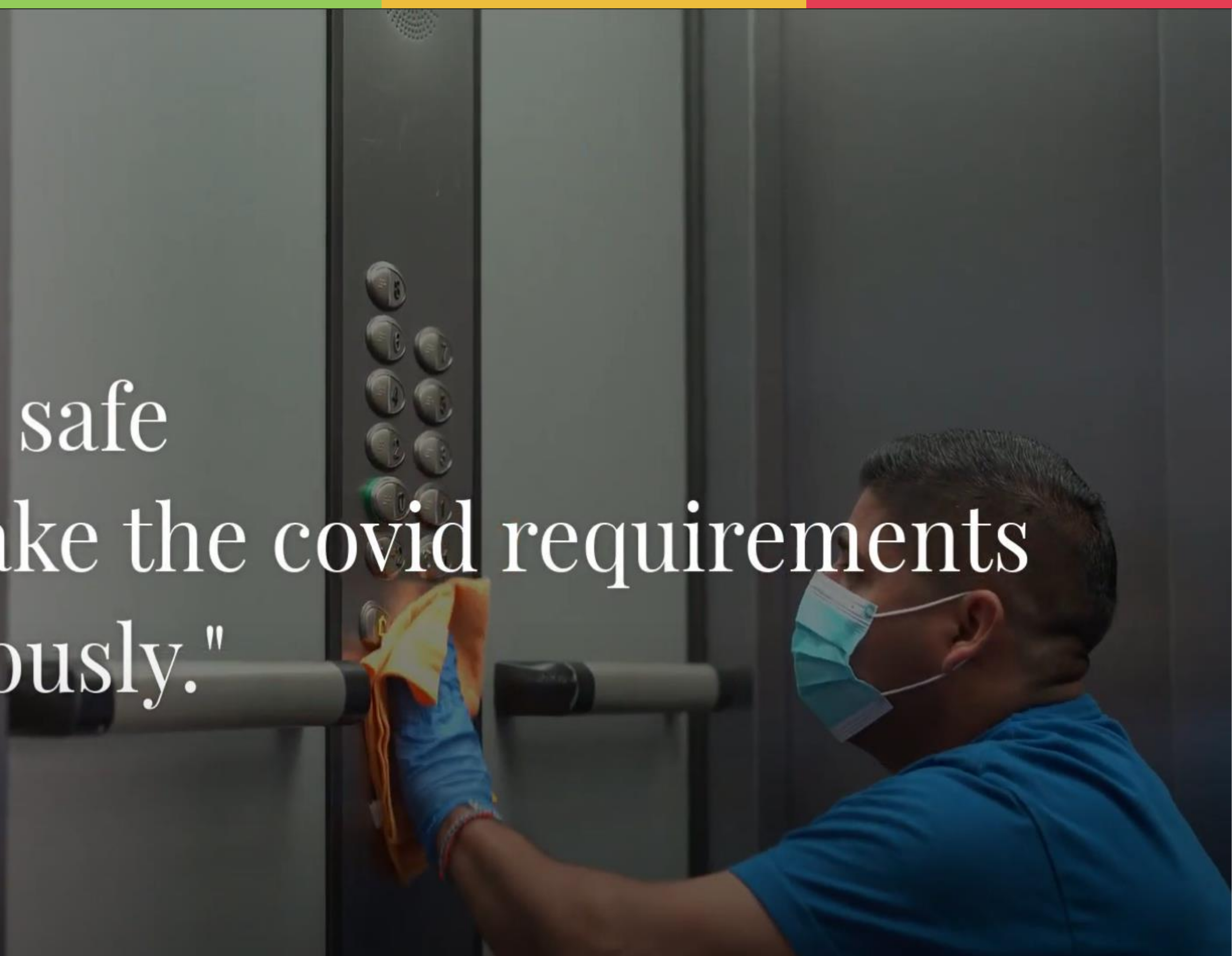
“ —

"Felt very safe

As they take the covid requirements

Very seriously."

— ”



“ —

"Inspiring place, quiet and enjoyable
as not too many tourists are in the city due to covid!"

— ”

“ —

The queue during Covid is faster and you can see the artworks clearly without getting in long lines

— ”

“ —
We paid full price for all inclusive
and many of the things we expected
were unavailable!
— ”


Sorry We are
CLOSED
Please Come Again

BI
PAR
MONDAY -
8.30

“ —

Breakfast was poor, served in a cheap brown bag with paper cups, because of covid (they said...)

— ”

A man in a red t-shirt and blue jeans is sitting on the edge of a bed in a hotel room. He has his right hand covering his face, suggesting he is upset or frustrated. The room has a wooden bed frame, white linens, and a window with curtains in the background. The overall lighting is dim, creating a somber atmosphere.

“ —
Disappointed by the room! Didn't feel clean
and no Aircon (wasn't reassuring in covid times!!)
— ”

“ —

Social distancing and mask wearing
were not enforced: unacceptable that
you must put yourself at risk!

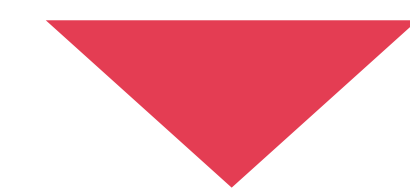
— ”

It is hard to live the "full experience" in Covid19 context



Guest Numbers

Guest Satisfaction

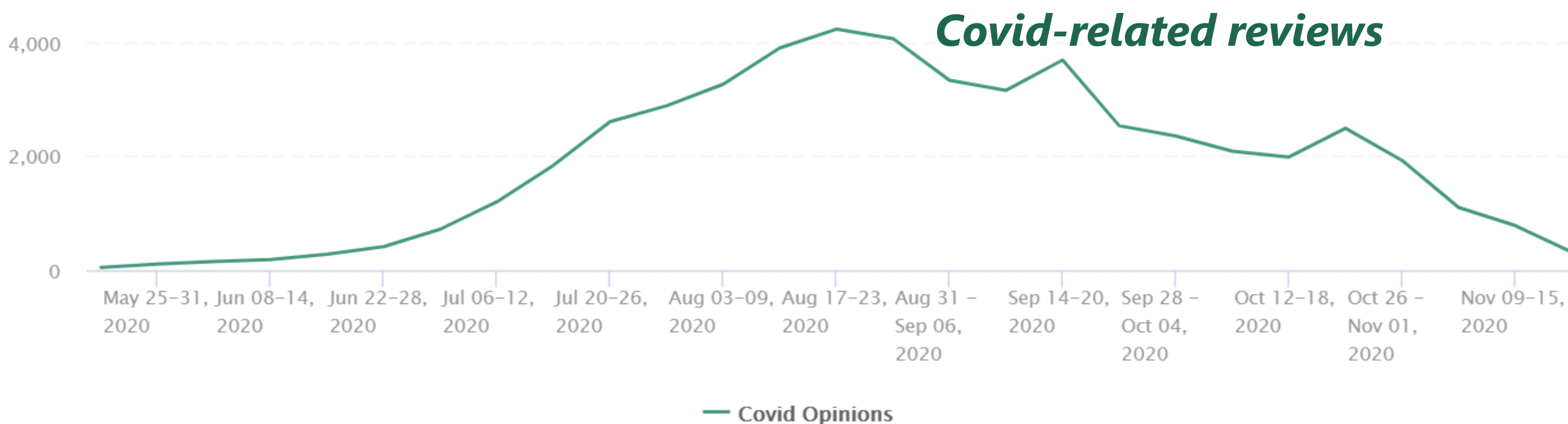


Latest trends fortunately indicate a "learning curve" is taking place

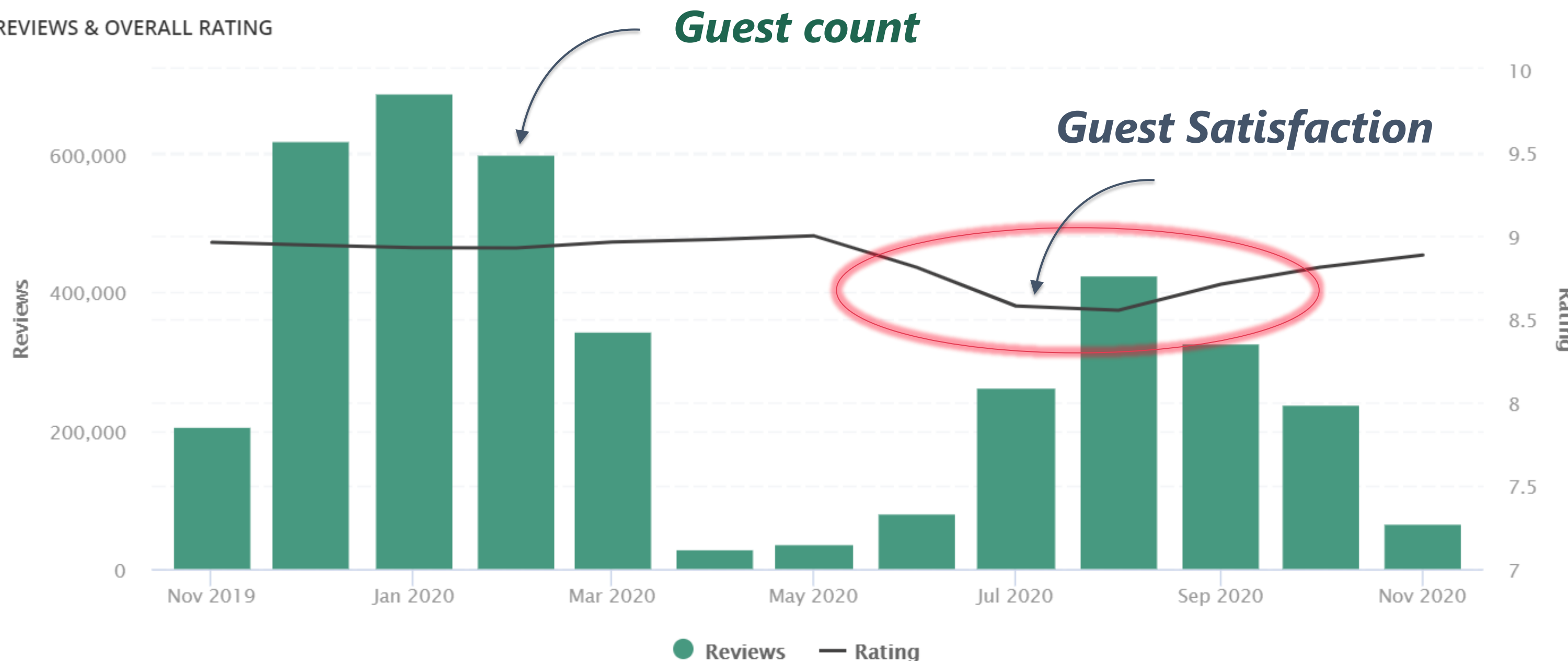
Dashboard

Filters: Date Range 2019-11-21 - 2020-11-20 | Type All | Star Class All | Groups (Not selected)

Covid Count Over Time



REVIEWS & OVERALL RATING



A GLOBAL CHALLENGE!

Dashboard

Filters: Date Range 2019-10-07 - 2020-10-07 | Region All | County All | Category All | Attraction type All | MICE All | Tourism Area All

Covid Count Over Time



REVIEWS & OVERALL RATING



SOME DESTINATIONS PERFORM BETTER THAN OTHERS

With controlled reopening that take care of their new visitors

- Insights
- Destination
- Dashboard
- Benchmark
- Watchlist
- Properties
- Benchmarks
- Reports
- Team Settings
- Personal Settings
- Help
- Sign out Olivier

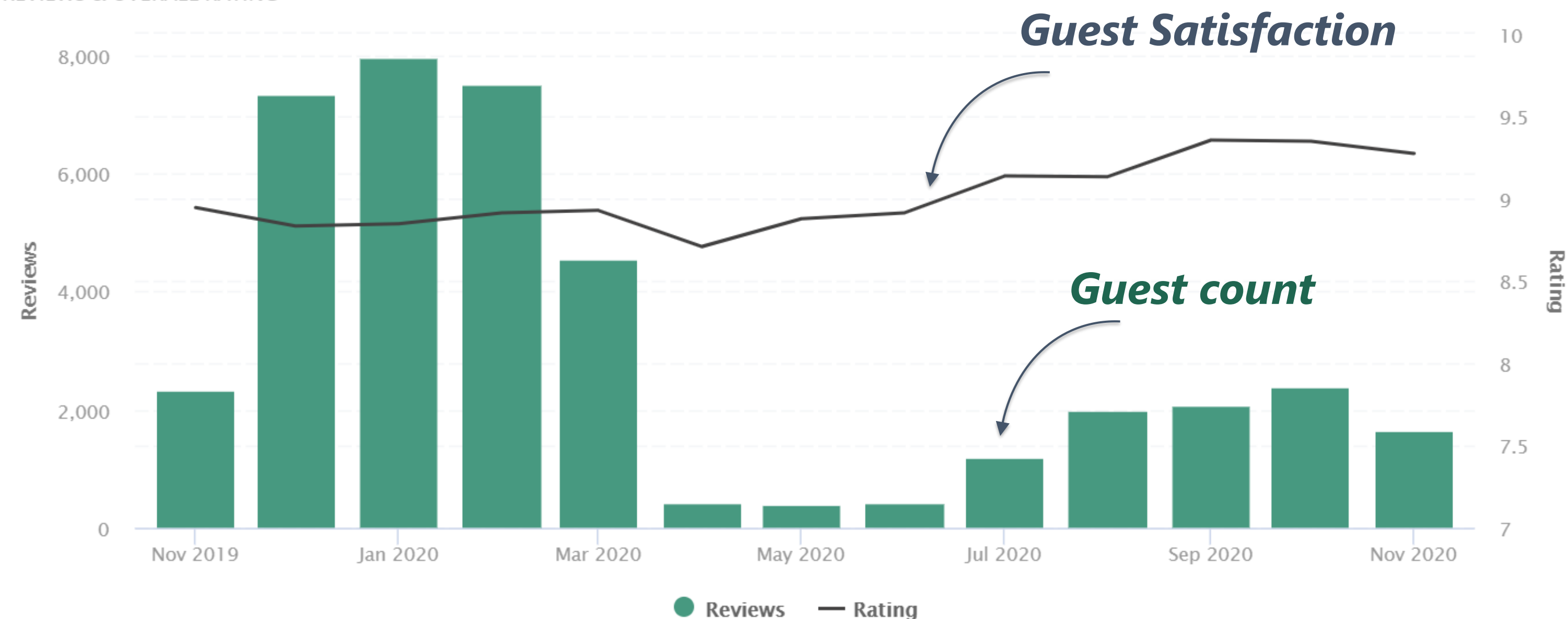
Dashboard

Filters Date Range 2019-11-21 - 2020-11-20 Type All Star Class All Groups (Not selected)

Covid Count Over Time



REVIEWS & OVERALL RATING

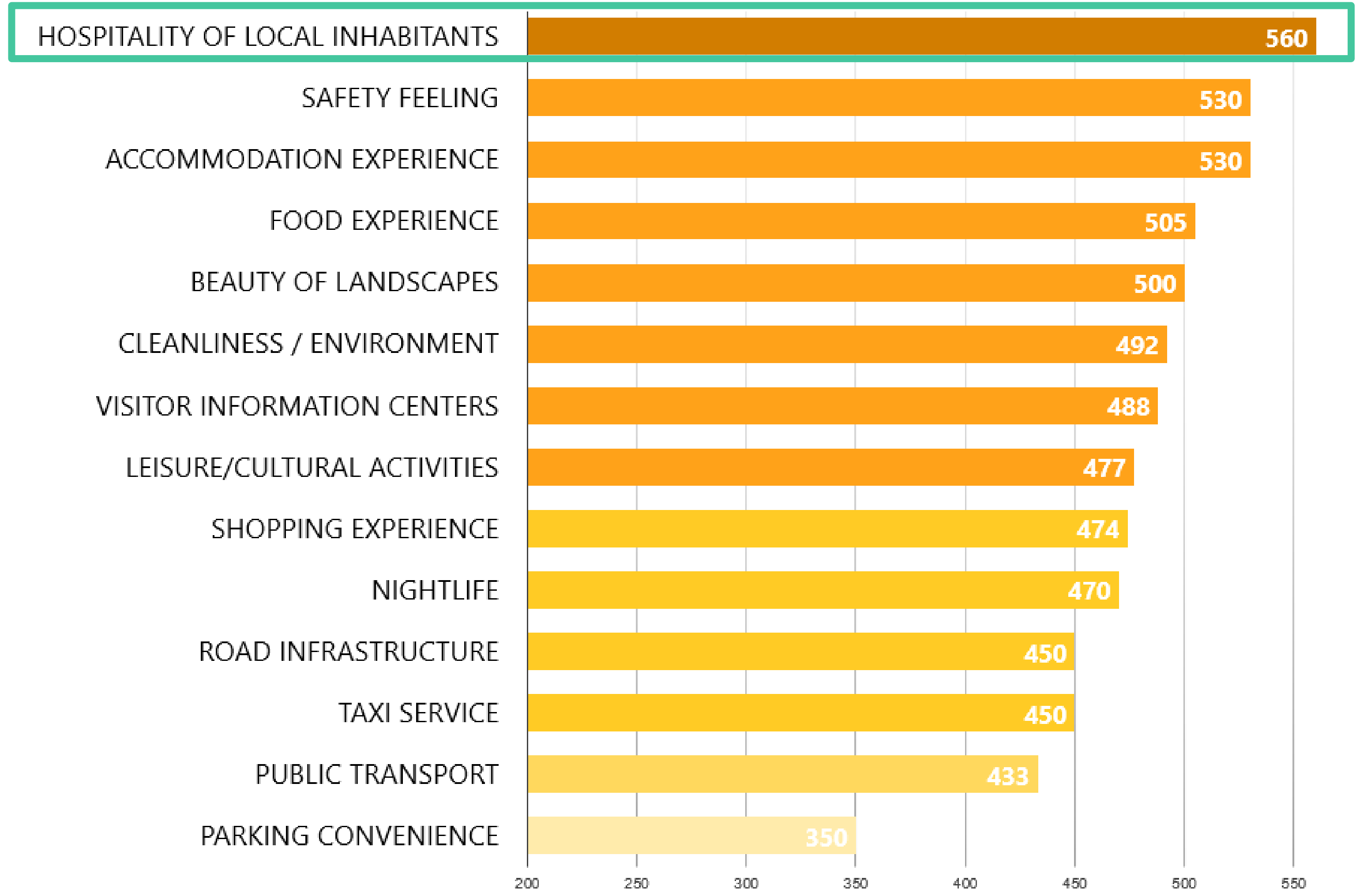


3. Engaging with the faces of your destination

FOREWORDS - Keeping residents happy with tourism in the post-covid19 era

Communities are the faces of destinations. Recent travel/covid19-related web social conversations have stressed the importance of watching residents' attitude and tourism support, particularly in the context of reactivating cities' reputation while the pandemic has been fueling risk of "tourism-phobia" among communities in the world.

So to seize the risks and opportunities and as part of its contribution to help DMOs manage the post-covid19 rebound, TCI Research has conducted **3000 interviews end of June 2020 among citizens in 20 iconic cities in Europe, Asia Pacific and North America.** This report consolidates opinions from representative residents in Barcelona, Paris, London, Stockholm and Rome (816 interviews in total).

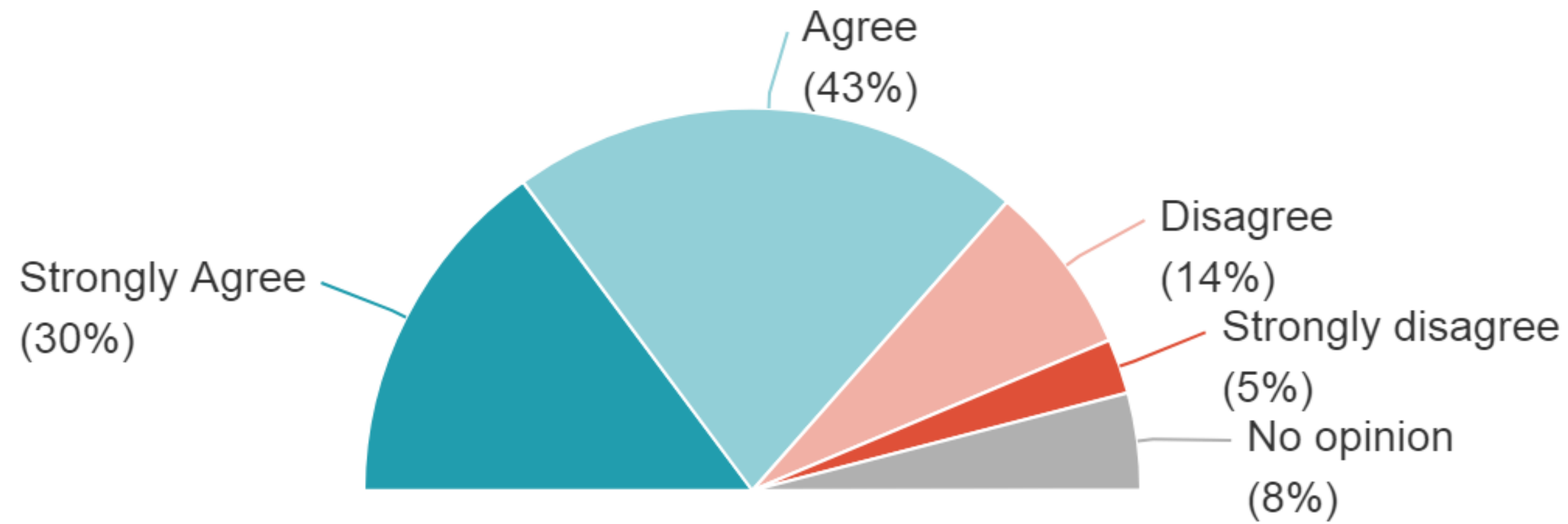


***Communities' attitude
#1 Driver
of Visitor Sentiment***

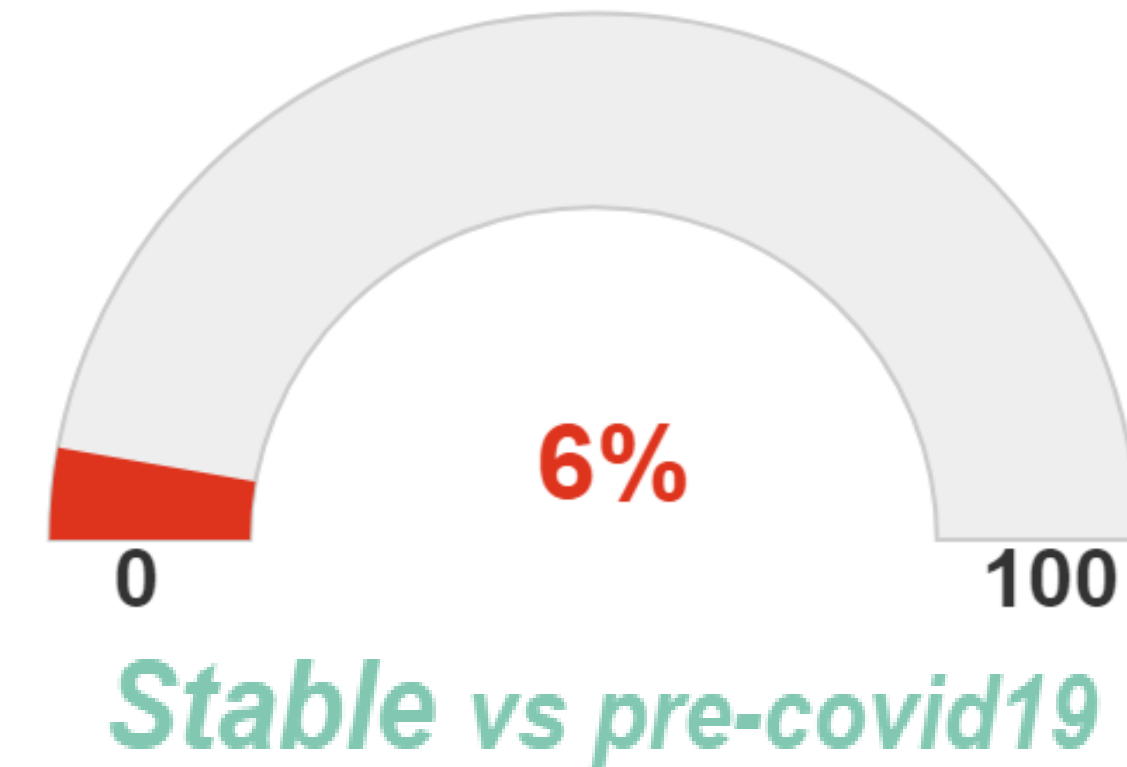
Travelsat 2018-19 : impact on total satisfaction

MOST RESIDENTS WANT TOURISM BACK AS MUCH AS BEFORE COVID19

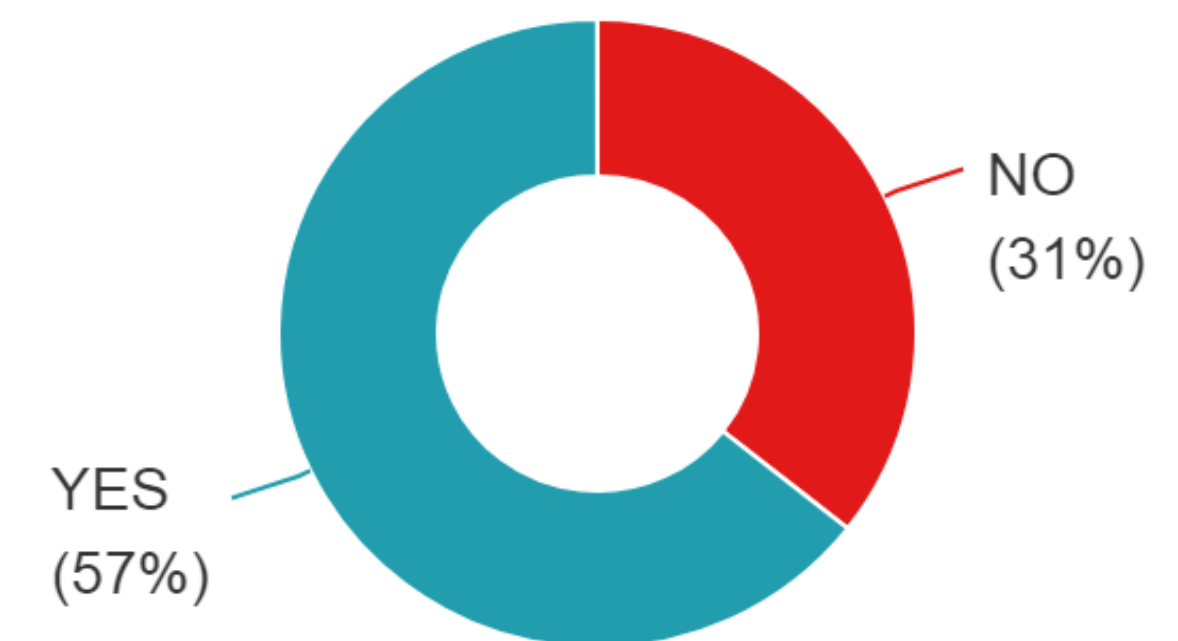
"The tourism industry needs financial support"



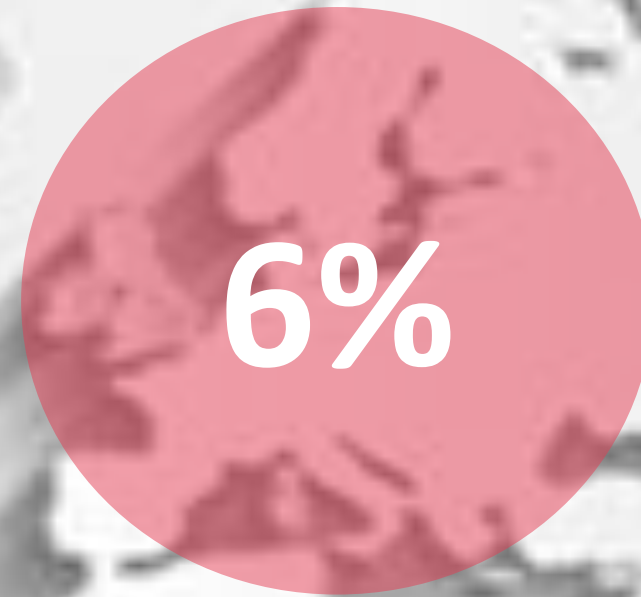
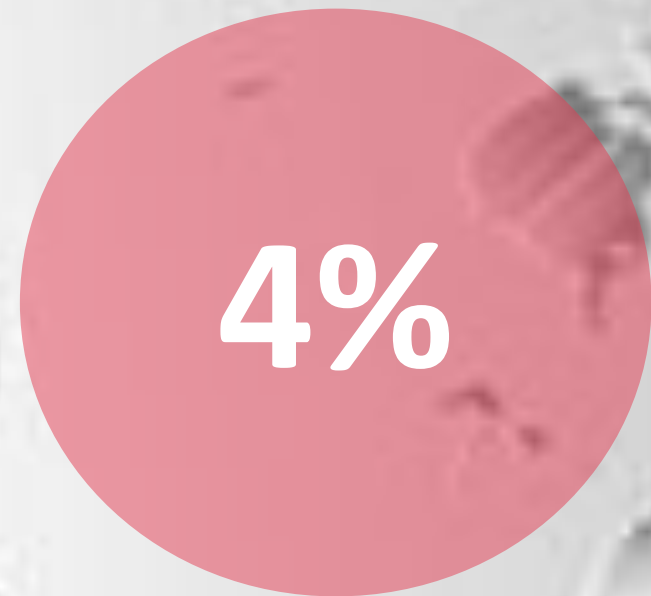
TOURISM-PHOBIA LEVEL



COVID19 READY FOR VISITORS

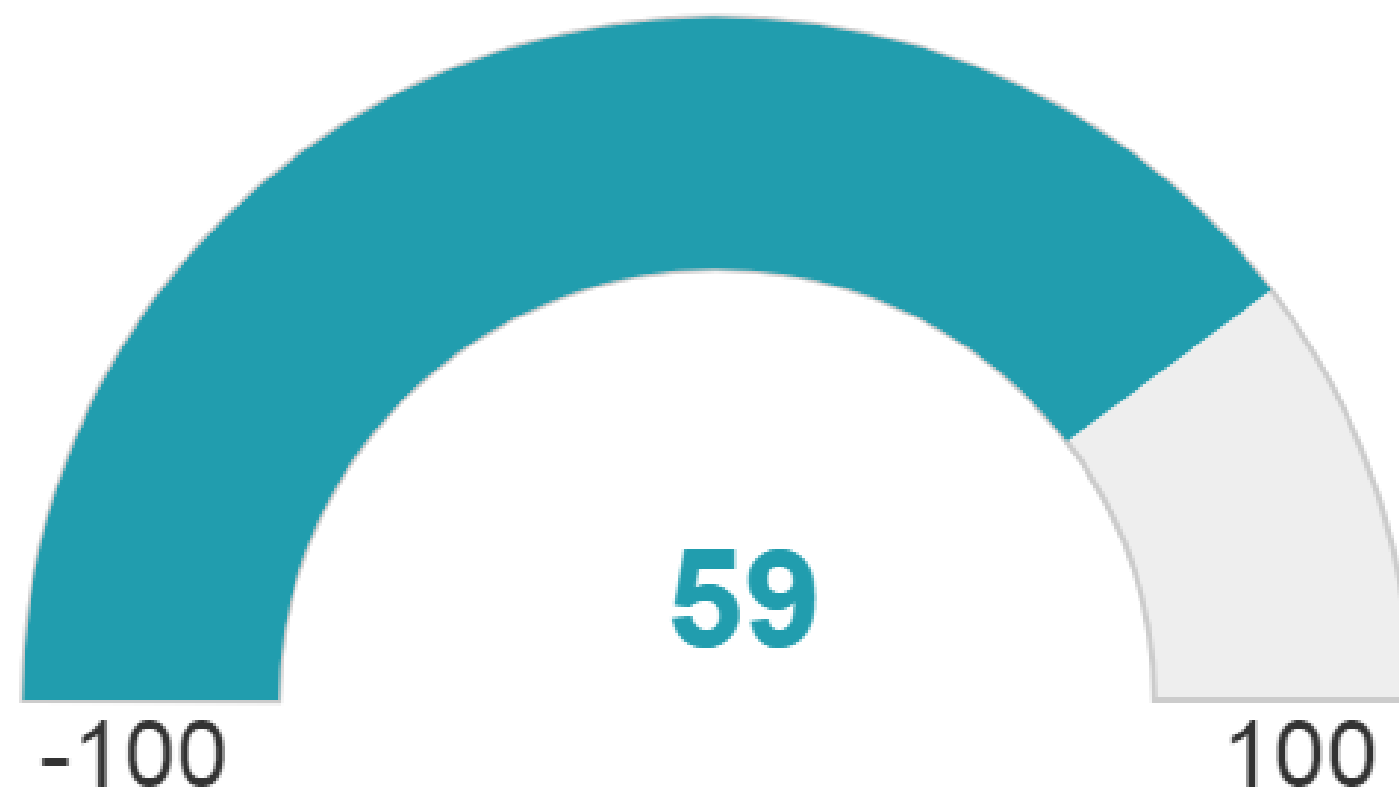


A GLOBAL TOURISM SUPPORTIVE ATTITUDE



 **travelsat**
Tourism-Phobia
Index

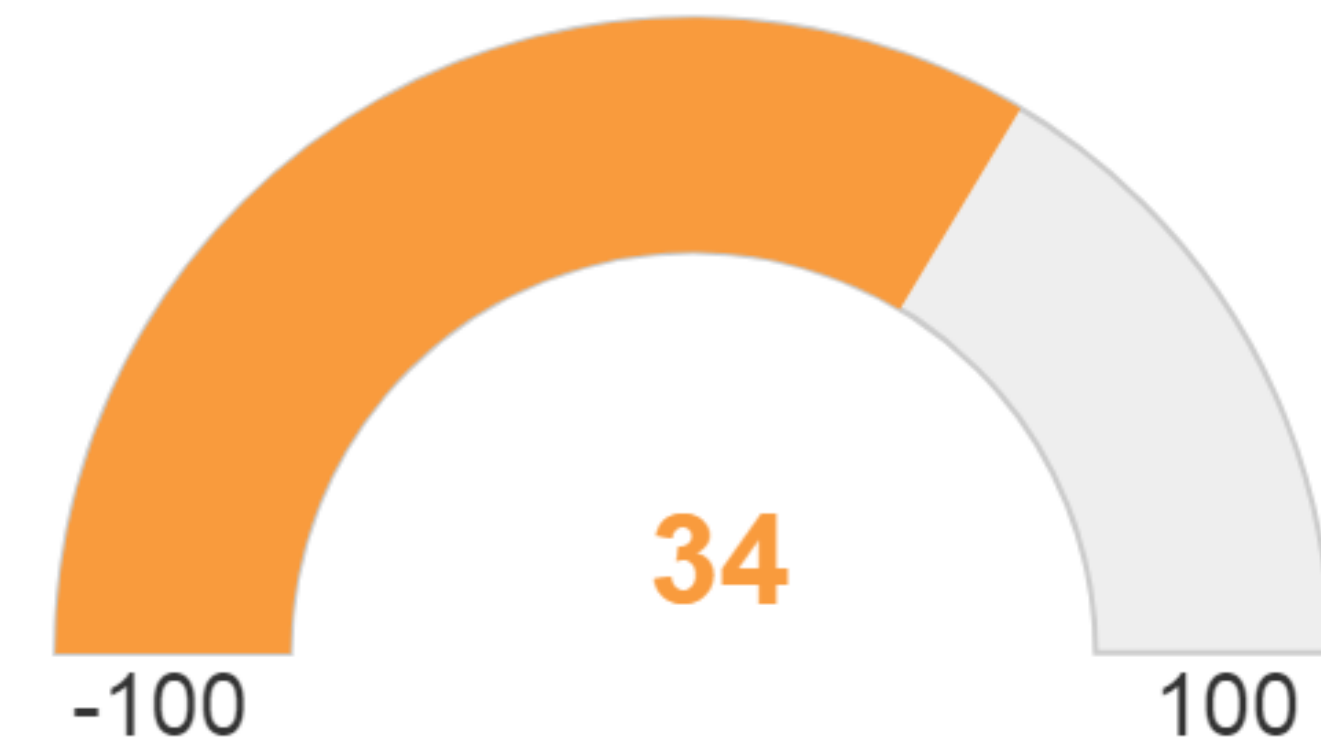
I like to give tourists advice and tips



+ 2

Evolutions vs pre-covid

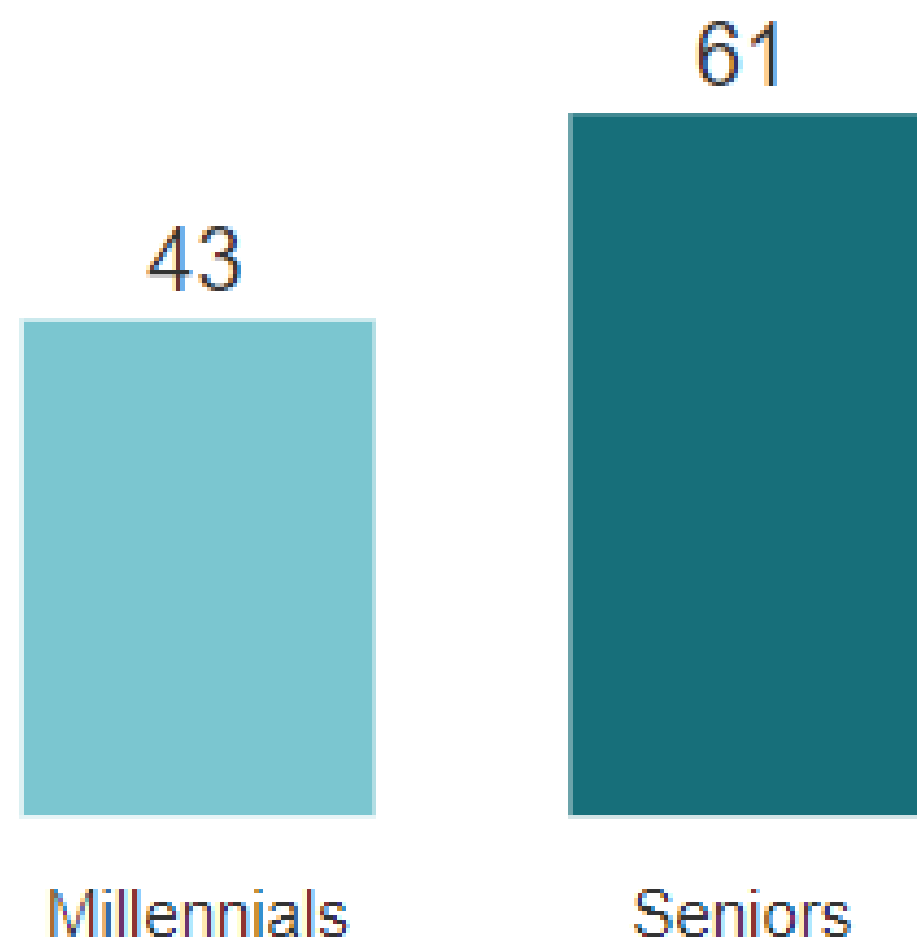
I would like to be more involved in decisions concerning tourism in my town



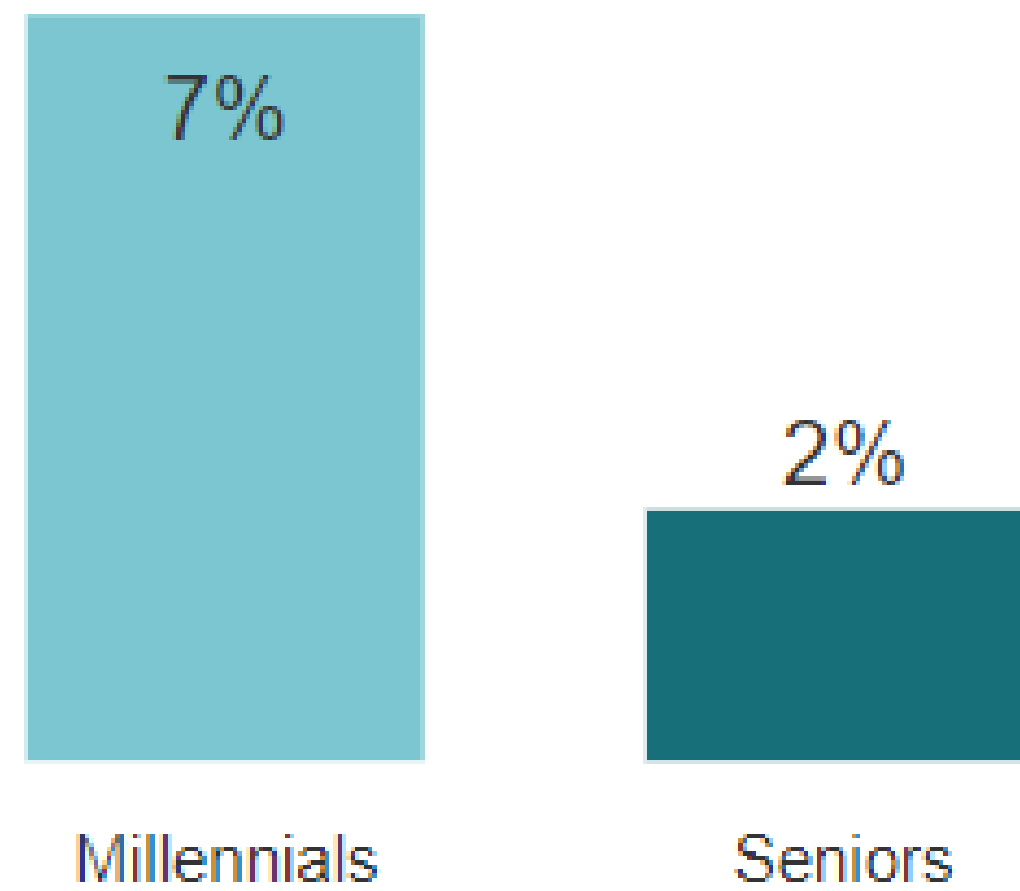
+ 3

Evolutions vs pre-covid

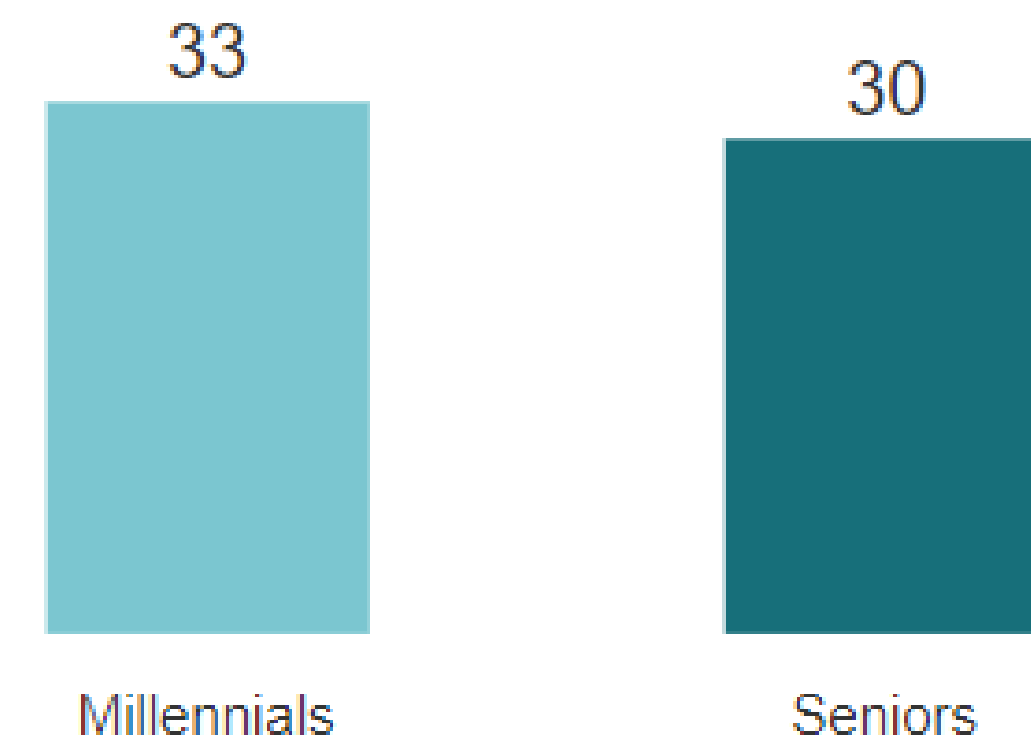
Net Sentiment Index



Tourism-Phobia Level



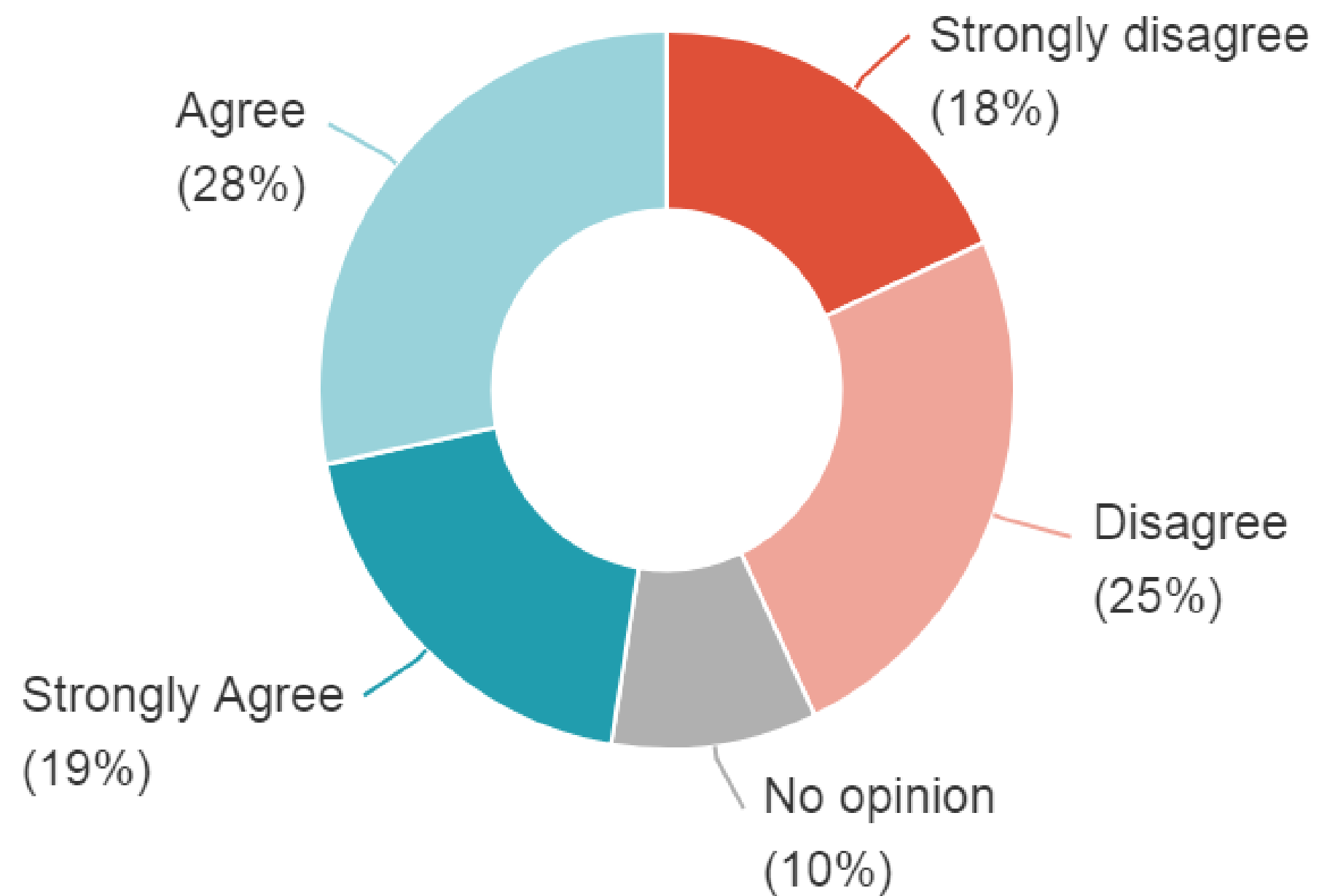
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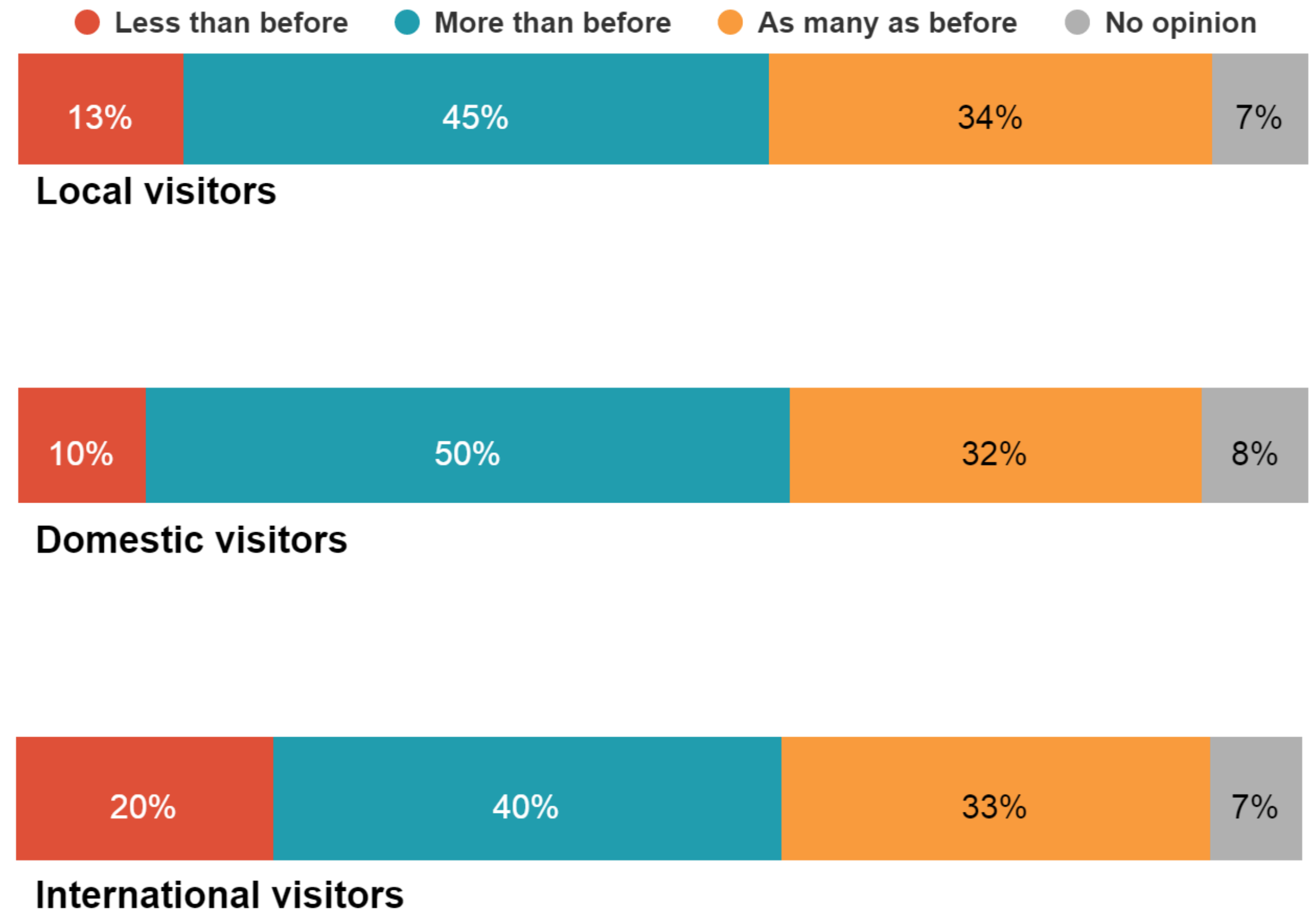
A RELATIVE CAUTION ATTITUDE THOUGH

Towards international visitors in the short term

A CAP ON INTERNATIONAL VISITORS BY 2020?



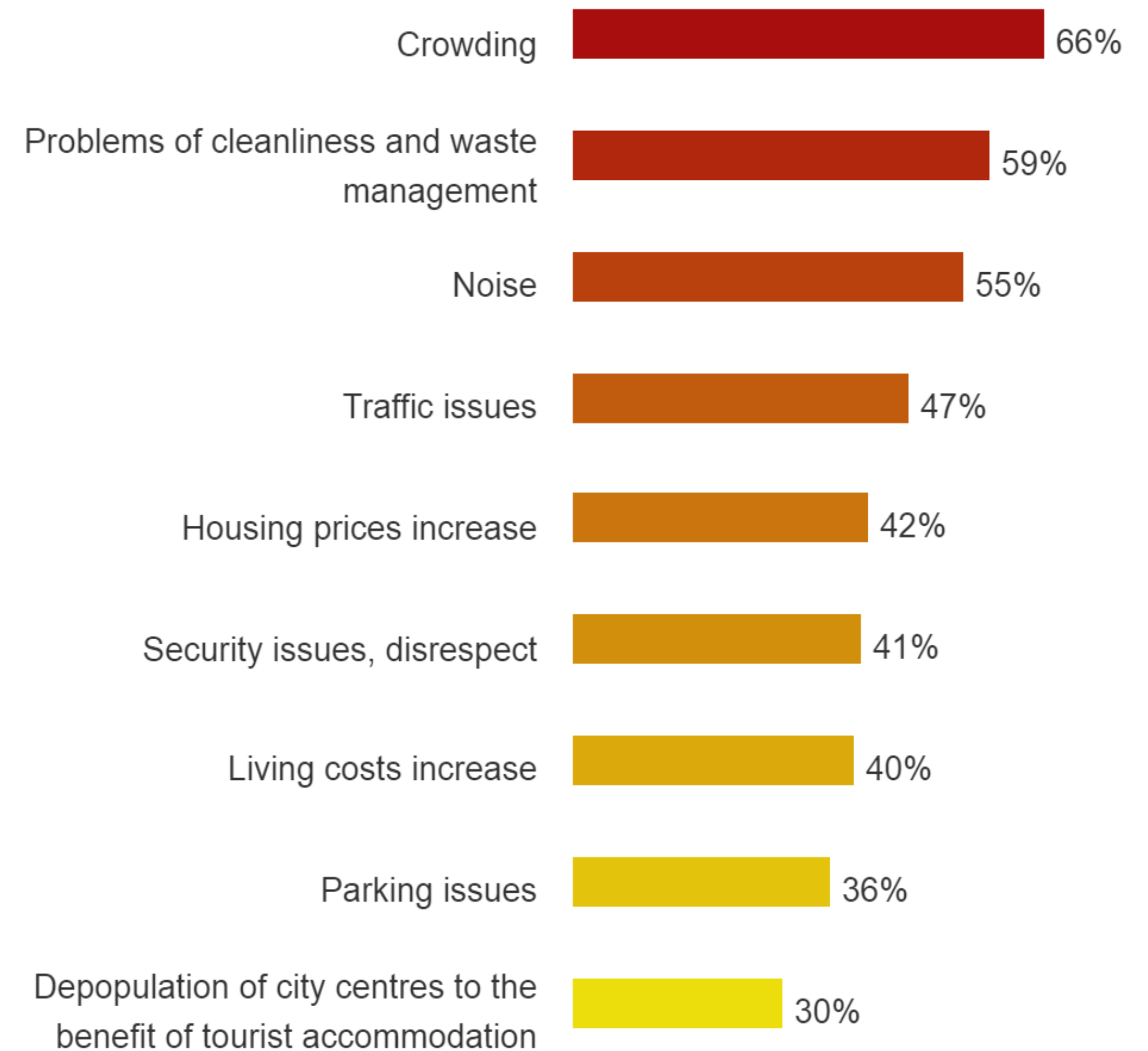
VISITOR SEGMENTS RESIDENTS WANT TO SEE MORE OR LESS



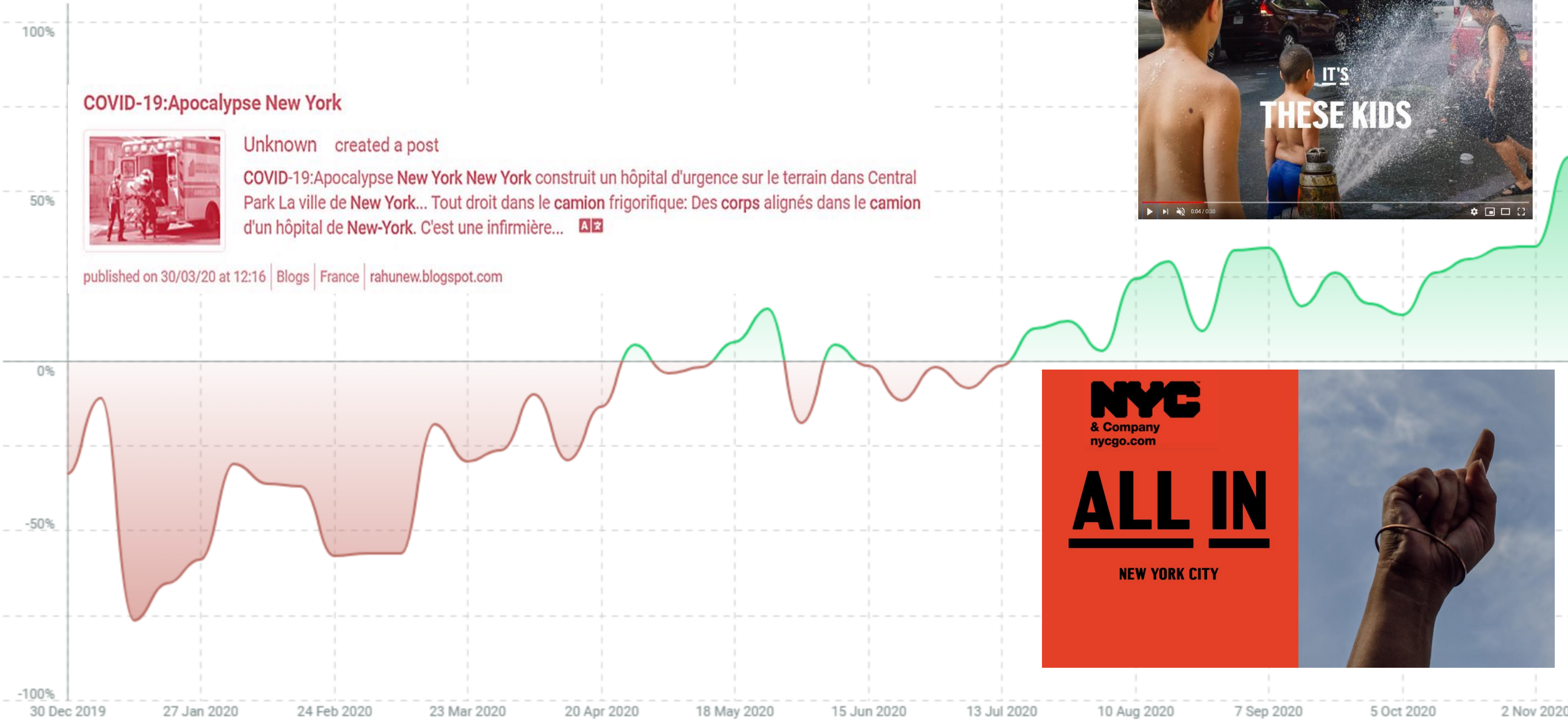
TOURISM IMPACT *(Net Score: Positive-Negative impact)*



VIGILANCE POINTS



COMMUNITIES CAN ACCELERATE REPUTATION REBOUND



COVID-19:Apocalypse New York



Unknown created a post

COVID-19:Apocalypse New York New York construit un hôpital d'urgence sur le terrain dans Central Park La ville de New York... Tout droit dans le camion frigorifique: Des corps alignés dans le camion d'un hôpital de New-York. C'est une infirmière... **A 2**

published on 30/03/20 at 12:16 | Blogs | France | rahunew.blogspot.com



FOCUSING ON A SHORT-TERM QUALITY-DRIVEN REOPENING

- The crisis acts above all as an **accelerator of pre-covid19 trends**
- **Demand is not stabilized at all.**
Is it the right time to totally redefine your destination strategy?
- An efficient **Destination Stewardship TODAY** is the most secured way of addressing the "next normal" tomorrow

THANK YOU FOR YOUR ATTENTION ... and as always, stay safe and well!

TCI Research is an independent UNWTO-Awarded market intelligence agency leading in international tourism and travel competitive analysis. It provides public and private players of the visitor economy with innovative research solutions and insights combining conventional surveys with controlled Big Data analysis covering the whole visitor journey

We are a global leader in destination competitive analysis.

Our standpoint is international.

Our methodologies are standard, endorsed and awarded by reputable tourism organizations.

We control smart integration of Big Data in combination with traditional surveys.

From real-time data dashboards to long-term trends analysis, the data scope and frequency you need!



request@tci-research.com



Text: +32476701125



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VISITOR SATISFACTION

DESTINATION REPUTATION

RESIDENT SENTIMENT

VISITOR SPEND

TRENDS ANALYSIS