HOW TO GUIDE: 2020 RECOVERY

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2020 RECOVERY HOW TO MAKE SENSE OF 2020'S SEISMIC SHIFTS

We're going to level with you here. When we put the finishing touches on our Drive 2.0 How to Guides in the early weeks of 2020, we felt confident we had delivered the tools industry professionals across the state said they needed to help strengthen their offerings. But, while that conviction hasn't changed, the world certainly has.

Now the question becomes, what can we do with that change? How can we harness it for the betterment of our residents and our workforce; our communities and our commonwealth? How can our tourism industry help drive the larger economic recovery ahead?

Unfortunately, this guide can't give you all the answers today. But what it can do is provide you with a firm grasp of the trends impacting our world and the ways in which those trends will continue to shape how we ultimately forge ahead.

In that regard, we encourage you to make this guide your constant companion as you digest our other How to Guides and our statewide plan. Consider this the lens through which our collective tourism industry recovery efforts must now be viewed.

THE CHANGING ENVIRONMENT

Let's start by painting 2020's portrait in a few broad strokes:

- An unprecedented pandemic few saw coming and even fewer were prepared to fight, prompting a severe economic downturn across many industries...
- A depleted federal economic relief package and a growing number of people out of work, under-worked, and running out of options...
- An eruption of protests in cities and towns across the nation calling for racial and social equity — protests which have led to both a heightened awareness of these causes and increasingly volatile moments...

It can be difficult to peer through such a sobering national landscape and see the tourism forest for the trees, but the tourism industry sits at the nexus of that landscape in many respects. Few industries were hit harder or faster by COVID-19, and the fact that restaurants, music venues, lodging, and retail stores still face significant operating restrictions means that many community assets are still reeling.

Consider this: Virginia alone lost over \$8 billion in travel spending from the onset of the pandemic through August 2020 (according to Tourism Economics). As of July, 25% of the workforce had been lost. At its peak, jobs were down more than 42% — equating to over 100,000 unemployed workers in the leisure and hospitality industry (according to the Bureau of Labor Statistics).

Meanwhile, as waves of protests continue to spark, the very fabric of our communities is being restitched. Confederate statuary, memorials, and names are being removed in some instances; hotly contested in others. And who we thought we were as communities and destinations is being brought under greater scrutiny.

Somehow, we seem more divided along socio-economic and racial lines than we've ever been, and yet never more united in other respects. Moving forward with any confidence in such a paradoxical time requires a keen understanding of where we unite, where we threaten to fracture, and where our shifting mindsets might take us.

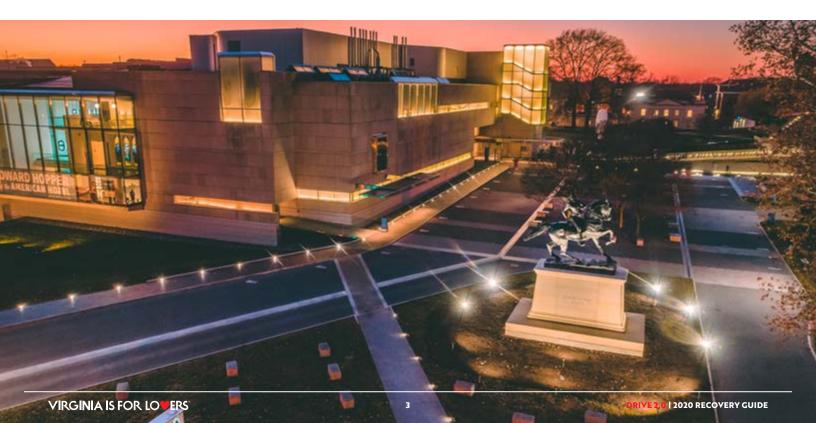


Admittedly, that previous section can be a bit overwhelming to digest. So, let's unpack it, step-by-step.

Below, you'll find seven emerging action-imperative trends 2020 has brought to the fore that will have lasting ramifications through 2021 and beyond. Each of these trends has the potential to drastically affect how we approach our recovery efforts, but taken together, they point to three key themes we urge you to keep in mind as you read:

- 1. Increasingly, your community will be your anchor, so what type of community are you now, and what kind of community do you want to become?
- 2. The experiences we provide don't always have to offer thrills, and there will be room and demand for quieter activities that allow for connection, mindfulness, and self-reflection experiences that promote physical and emotional well-being as much as they offer escape and excitement.
- 3. In tourism, nobody goes it alone, and with massive budget shortfalls on the horizon and shifting business models across all industries, your partners are going to be more vital than ever. But remember, you will be just as important to them as they are to you, so it will be incumbent upon our industry to offer solutions for our communities moving forward.

As we walk you through each of these trends, we'll start from a wide angle. From there, we'll cover specific tourism implications and then detail how each trend applies to specific action items and topics found in our other guides. Finally, we'll share some exercises and leading questions to get you thinking about how these trends impact you directly.



1. BE NIMBLE

COVID-19's ability to upend our social and economic systems with such relative ease means we're more cognizant of the ever-present possibility of swift, dramatic change. Uncertainty is the only certainty, and those individuals, businesses, and organizations who prove nimble — who demonstrate an ability to pivot quickly and adapt — will have the advantage.

Tourism Industry Implications

In short, we need to be ready for anything, not just visitors. In addition to developing solid strategic plans, tourism organizations must also hone a perpetual planning mindset. This mindset will allow them to more quickly assess risks and trends and respond with innovative solutions. No one wants to be caught unaware again, so restaurants must continue to find new ways to give customers what they want without necessarily seating them at a table. Lodging venues must continue to maintain flexible operating protocols that can meet shifting restrictions and offer fresh incentives to encourage stays. Cultural event organizers and attractions must continue to develop appealing virtual executions that can fill the in-person void now, as well as augment the in-person experience once restrictions are lifted. And outdoor recreation planners must continue to ensure resources are adequately managed and protected in the face of greater demand.

Recovery Planning Considerations:

Enhancing Experiences: As you complete or revisit your hub and spoke, look for ways to augment your experiences. How can your community's signature festival adopt virtual platforms, for instance, or offer more inclusive experiences? What new events might hold appeal in ways they may not have in a pre-pandemic world? Part of maintaining a perpetual planning mindset means constantly viewing your current and future state with fresh eyes. So, see what new ideas come to mind now that the world has turned.

Finding Funding: The same holds true for finding funding amid shrinking budgets and a growing pool of applicants. The birds that catch the worms are going to be the ones who can pounce as soon as funding becomes available with a refined, up-to-date pitch that showcases them as nimble and undaunted by challenges and uncertainty.

Making Your Case: Municipal budgets are already stretched beyond their limits. To show that you're essential, that you're providing an unassailable benefit to your community, you must be able to demonstrate your worth. But remember: Your worth doesn't just come from what you've provided in the past, it comes from how you're prepared to provide even greater benefit now and moving forward, no matter what the future holds.

- **1.** What policies, programs, events, etc. have you instituted or adapted since March that demonstrate your nimbleness?
- **2.** What is your greatest risk moving forward, and what are you doing now to ensure you're able to address it?
- 3. Finally, take a moment and envision yourself in a future where the pandemic is no longer a threat. How does your offering look different? How does it look the same? How has your role shifted? Imagining your future can help define the steps you'll need to get there.

2. TAKE CARE

COVID-19 is more than a healthcare crisis — it's a global human crisis we continue to watch unfold around us 24-7. The need for physical and emotional well-being and access to care for all has never been greater. And yet, vulnerability to the virus, prolonged social isolation, lack of exercise, and increasing financial uncertainty are making that sense of well-being harder to attain. In that regard, self-care will continue to become more of a necessity than a luxury, and the emotional benefits of connecting and rejuvenation will increasingly be sought.

Tourism Industry Implications

Excitement and escape will still be main hallmarks of a vacation or getaway. However, how you promote a sense of mindfulness will be key, as will the ability to incorporate activities that foster physical and emotional well-being and connection. In this regard, outdoor recreation will continue to gain appeal, as will activities that allow for quiet reflection, family bonding, and centeredness.

As we view vacations more and more through the lens of rejuvenation and well-being, establishing those feeling in their pre-trip anticipation will be a key messaging consideration. By delivering on that experience while visitors are with you and communicating with them post-trip, you can tap into those lingering feelings when they return home. Expanding the experience continuum in that way will make you much more appealing when it comes time to plan the next trip.

Recovery Planning Considerations:

Telling Your Story: This is about showcasing the emotional benefits of your experience on a visceral level. So, where do things like wellness, mindfulness, centeredness, and rejuvenation currently fit into your brand essence? Are they called out in communications or only hinted at? Room must be made for positioning your destination as a chance to connect emotionally — both with ourselves and with others. Since feeling welcome and included can help foster an overall sense of well-being, paying extra mind to how you tell your story, and who is telling it, will be important.

Enhancing Experiences: As you assess your needs and inventory your assets, look for ways to package wellness in fresh ways. For instance, we've traditionally talked about connecting experiences together in physical terms, but the emotions evoked through our experiences may prove to be just as valuable a link. A hike in the woods that centers you with nature followed by a guided meditation or float spa can be a valuable and appealing emotional through-line. Similarly, a package that includes early morning yoga among the vines of a winery followed by a light farm-to-table lunch and wine tasting may offer both physical and emotional connection.

Recruiting Partners: As you think about your tourism and economic development network, make sure you're including your yoga, meditation, and fitness instructors, and even your area healthcare providers, as they can help to showcase your community as a healthful and mindful destination. Your local restaurants, farmers, and other producers and artists can also help you round out the emotionally connected experience.

- When you hear terms like "wellness," "mindfulness," and "rejuvenation" as they relate to your destination or attraction, what three things come to mind? Do these words feel like adequate descriptors for experience?
- 2. How can your communications evolve to showcase these attributes in ways that are believable and differentiating? How would you convince someone looking for a mindful experience that you're it?
- 3. Like the examples we provided above in "Enhancing Experiences," what are some "emotional" ways you can connect your experiences?

3. ENGAGE EQUITY

On one hand, COVID-19 has helped unite us. After all, the virus doesn't care if you're young, old, rich, poor, Black, or white. On the other hand, the widespread racial equity and social justice movement has highlighted some of our deepest divisions. That said, support for the movement has grown among every population segment and racial identity since May 2020. In that time, companies have rebranded products that have historically leveraged stereotypes, education providers have evolved curricula and operational protocols, and community leaders continue to debate the merits of systemic reforms. In this vein, equity will remain central to how many examine the institutions, businesses, and communities they choose to support.

Tourism Industry Implications

As we detail in our statewide and regional plans, America is becoming increasingly diverse. According to U.S. Census data and projections, more children will be born this year to parents of color, and, by 2044, the majority of the entire U.S. population will identify as people of color. These more diverse visitors of the future will increasingly value diverse, welcoming, equitable, and inclusive places for all. However, the current climate surrounding the racial equity and social justice movement means we must be acutely aware of the Black traveler experience.

Ultimately, the words and actions of residents, elected officials, and community leaders, as well as the stories they choose to tell, will determine how welcome people feel with you and how attractive they find your destination.

Recovery Planning Considerations:

Telling Your Story: Never has it been more vital to understand how your visitors and residents perceive you. Social media has allowed them to shape your narrative for you in many ways. Black travelers in particular rely heavily on word of mouth reputation and social media when researching places to visit. In that regard, your story has already been told for you to a large degree, and Black travelers already have a good idea whether they'll feel welcomed and safe and whether you offer a valuable experience for them. Any desire to improve your reputation among diverse groups of travelers will require a committed effort. That effort begins by examining what people truly think and say about you and using that information to pinpoint opportunities to make yourself more welcoming, diverse, equitable, and inclusive. **Enhancing Experiences:** Virginia's heritage attractions are at a crossroads. How Virginia's communities grapple with their pasts — how they evolve and expand their presentation of history to include more untold and unheard stories and voices, especially those of Black people, Indigenous people, and other people of color — will ultimately determine their appeal. Remember: It's not that all Black people don't want to visit Virginia's heritage sites, it's that they want those places to speak to their experiences, and the experiences of their ancestors, in inclusive, accurate, and contemporary ways.

Recruiting Partners: The good news about facing this kind of crossroads is there will always be people willing to help you navigate issues of diversity, equity, and inclusion. So, as you list out and build up your tourism and economic development network, ask yourself: Do I have organizations committed to advocacy and racial equity included on my list? Are there enough people of color across all stakeholder groups? Do I have established relationships with Black business owners? If you can't answer yes to these questions, it's time to start building those relationships. When you demonstrate that commitment, others will commit with you.

- 1. Imagine you're visiting your community or destination for the first time. Who, and what, do you see — from the highway exit, to the outskirts, to main street, to your individual neighborhoods? How would you describe your first impression?
- 2. Think back to any research you may have conducted in the past. Were issues of diversity, equity, and inclusion explored? If so, re-examine those findings considering this trend. If not, what questions would you ask if you could conduct that study all over again?
- 3. Think about how your historical attractions are currently positioned and the narrative they convey. Are they confined to telling the story of a single battle, or a fully fleshed-out story of a war? Do they uplift under-told stories? If not, how can they be expanded to better speak to the Black experience?
- 4. Google yourself. Scour your social media mentions. Avoid the impulse to defend or rationalize and simply go through the results. What's being said, and who's doing the talking? What narrative emerges and how does that align (or not align) with the story you tell through your marketing and communications?

4. STRONGER TOGETHER

How many times have you seen or heard an advertisement post-COVID-19 suggesting that we're all in this together, or that we're stronger together? The spirit and power of teamwork has been the calling card of this crisis, and it will be the key to recovery. We'll all be expected to do more with less as our economy recovers, and this will require developing new and meaningful ways of working together across industry sectors

Tourism Industry Implications

The traditional notion of "partner" for tourism destinations, organizations, and communities will continue to shift and evolve beyond things like sponsorships. More than ever, services will need to be shared across municipalities and entire regions. Putting on large-scale events will require even stronger public-private partnerships in the face of dwindling public funds. Small-scale events like concerts in the park or art walks — things that add dimension for locals and visitors alike — will be at risk. And the survival of community theatres and cultural organizations who rely on public funds for their operating budgets will continue to be threatened unless private partners recognize their value and cover some of the shortfall.

Recovery Planning Considerations:

Recruiting Partners: As you map out your tourism and economic development network, think about how these trends are also impacting your current and potential partners. Knowing how they're navigating this climate will be a big boost to helping you pinpoint opportunities to partner. Also, it may be time to broaden that list and look to those who may have felt like unlikely partners before. A "no" last year might be a "yes" now, as communities orchestrate more public-private partnerships and larger companies continue to embrace corporate social responsibility. Finally, it may be time to look to another region or destination in Virginia you may have previously regarded as a competitor and begin exploring cross-regional partnerships.

Making the Case: The steep financial losses related to COVID-19 over the spring and summer may serve to be a blessing in disguise, in some respects, as the lack of tourism dollars coming in now helps to showcase just how much economic impact tourism has had in the past. If there was ever a time to convince skeptics of what tourism can bring to a community, it will be while the sting of closed attractions and businesses are still fresh.

Finding Funding: As we discuss in the broader industry implication, private contributions are going to gain importance in the face of public funding shortfalls. So, being able to demonstrate the strength of your partnerships in a time when partnerships are increasingly valued and essential will elevate your pitch to private investors, as well as public entities that must narrow down what they can support financially.

- Check in with your mayor, the head of your chamber, the director of your local theatre — whomever you value as a partner — and approach the conversation with no agenda other than to spark a conversation that matters to them. How are they doing? What's keeping them up at night? What's giving them hope?
- 2. Think about your nearest competitor and what they offer. What's one way you could partner together to the benefit of both?
- **3.** Think about one partner or stakeholder you've never quite been able to land or fully convince of your worth. How might you try to appeal to them now in the wake of such drastic societal change?

5. STAY CLOSE AND FAMILIAR

Even as we remain more virtually connected than ever, our desire to be in each other's presence has never been greater. Visiting friends, family, and loved ones has always been one of the top drivers of trip decision-making, and as of August 2020, it was the most desired trip activity for more than 46% of the population. With the financial strain COVID-19 has placed on travel budgets, people are also staying closer to home, as 54% say they're planning a regional trip under 200 miles. Finally, add budgetary constraints with the fear of contracting the virus, and we find travelers also becoming more wary of new places, with more than 70% saying they're likely or very likely to travel to a previously visited destination. (Source: Destination Analysts)

Tourism Industry Implications

Your nearby markets have never been more vital or more important to reach. In addition, some of your past visitors who may have typically preferred to travel to new places every year may not need as much convincing to come back to you now. Upscale lodging may still hold appeal for some, especially as it pertains to ensuring clean and sanitized rooms, but smaller travel budgets will make staying with friends and family an increasingly compelling option.

Recovery Planning Considerations:

Telling Your Story: Of course, we always want to turn first-time visitors into repeat visitors. Now, our ability to do so will become even more of an imperative. If your narrative has traditionally relied on capturing new visitors, it might be time to consider shifting some of your talking points to appeal to past visitors as well. Familiarity, nostalgia for simpler pre-COVID times, and offering a chance to reconnect with the places and people we love may be appealing message points.

Enhancing Experiences: Our growing desire to be with people means that connection is the primary activity many of us will continue to seek. Simply being together is the experience to some extent, which means things like sharing a meal or enjoying a family hike and picnic may feel like more "fun" than they used to. How your destination or community fosters that sense of togetherness will continue to gain importance. Also, as people stay closer to home, a desire to see all their home state of Virginia has to offer may also increase, which means you can position your offering as a unique and essential part of the larger Virginia experience.

Recruiting Partners: Even if visiting loved ones isn't the primary purpose of a trip, staying with friends and family may be the only way many can afford to take a trip moving forward. This means turning your local and nearby residents into ambassadors for your destination and experiences have never been more important. How they talk about you and where they take their loved ones will greatly determine how much people enjoy their visit.

- 1. Go back through any and all past visitor studies you may have at your disposal with fresh eyes. The reasons visitors gave for not coming back in the past may not present as obstacles in the same way and may in fact point to new opportunities to reach them.
- 2. Similarly, go through any past resident studies you or others may have done with the same keen eye. How do they feel about where they live? How can their perceptions of you be improved, and how can you better support and leverage the places and experiences they love?
- 3. Imagine you had friends or family staying with you for the first time right now. Where would you take them? What would you encourage them to check out before they leave? How does your itinerary fit with the experience you're selling?

6. GET LOCAL

Our social isolation in the wake of COVID-19 has kept us from engaging with the people, places, and experiences we love most about where we live — our favorite restaurants and shops; museums and music venues. And, as this absence makes our hearts grow fonder, our drive to support our local gems and invest in the redevelopment of authentic community assets will continue to grow as we set our sights on COVID-19 recovery.

Tourism Industry Implications

Unfortunately, some of the unique assets and experiences that made up our tourism offering prior to 2020 may not have been able to survive the economic toll of this pandemic. Meanwhile, those that have survived may have shifted their business models dramatically, meaning they may not be able to offer as much as they once did. That said, in the long run, a continued drive to build up and support our local players will ultimately manifest in stronger, more vibrant communities — exactly the kinds of places people will want to visit, explore, and experience.

Recovery Planning Considerations:

Telling Your Story: Now will be a telling time to learn what your residents and past visitors truly love about your community or destination, as they'll be much better able to articulate what they may have taken for granted and what they truly miss. By leaning into those assets and emotions as you refine your differentiating narrative, you'll not only remind residents and visitors of why they chose you in the first place, you'll set the stage for a community renaissance they'll want to join. Similarly, by featuring local artists, performers, and hidden gems, your local flair may prove just as enticing as the "big ticket" items you offer.

Enhancing Experiences: As you inventory your assets in a post-COVID world, pay close attention to those that were able to weather the storm and why. What made them appealing and successful even in the face of daunting challenges, how can those attributes be applied to other assets, and what experiences can be added to better complement them moving forward? Also, take note of those assets you may have overlooked in the past and how those can be better incorporated into your entire offering.

Recruiting Partners and Making the Case: It's a classic case of not knowing what you've got till it's gone. As we touched on in Trend No. 4: Stronger Together, if there was ever a time to point to your worth, now is it. People who once maybe lamented the influx of tourists downtown may think the area feels a little emptier and lackluster now that they've returned in fewer numbers. And those who perhaps haven't in the past been swayed by raw impact data may feel differently now that their favorite store is struggling and their favorite restaurant hasn't reopened yet.

- Think back to the earliest days of the pandemic. What did you most miss doing? Where did you most miss going? Have these things traditionally been touted as part of your offering? How can they be better incorporated moving forward?
- 2. What are some ways you've seen your community band together during these trying times? How can that local spirit be harnessed and showcased?

7. LIVE HERE - WORK THERE

Pre-COVID-19, one in three workers were part of America's distributed or remote workforce, and while experts speculated this segment would grow to one in two by 2030, COVID's impact will likely push us there in a few short years. With fewer ties to their offices, people will increasingly pick where they want to live independent of their job location. In fact, we're already witnessing an exodus from America's densest cities, as people search for smaller regions that offer a lower cost of living and higher quality of life. Consider: According to a Harris poll conducted in August, 40% of American city dwellers with children were considering a move, and a poll from software company Zapier found that almost half of respondents would leave California's Bay Area if they were able to work remotely.

Tourism Industry Implications

Since companies will still chase talent and locate in places where people want to live, economic development organizations will focus on talent attraction in much the same way that DMOs and CVBs market their destinations, which may ultimately serve to strengthen and amplify your message. Some of your past and prospective visitors may in fact be potential new residents.

Apart from that, the trend toward more remote work and virtual learning for children may serve to expand your prime seasons. Summer vacation will still reign supreme, but if one isn't tied to an office or classroom, why not enjoy the beach or a mountain hike in the morning and settle in for work and school from a balcony or hotel room later?

Recovery Planning Considerations:

Telling Your Story: We've traditionally talked about what makes your community a unique place to live being a driving factor in what makes it an appealing place to visit. Moving forward, the

two will go hand in hand much more seamlessly. What makes you a unique place to visit may in fact make someone want to live there, especially if you deliver a great experience while they're with you. By leaning into what makes your community special, not just your assets and draws, you may be able to position yourself as more than just a place to visit.

Enhancing Experiences: As you go through your hub and spoke and inventory your assets, you may not need to worry as much about the wow factor. If the experiences and community assets you showcase can connote a high quality of life, a diverse, welcoming and inclusive community, and a unique local vibe, that may be enough for you to convincingly cross-sell as a place to visit and live.

Recruiting Partners: Your local and regional economic development agencies and organizations will continue to be a prime partner to leverage moving forward, provided your respective messaging platforms hit the same notes and complement each other. If you can convince them to see the benefit of tourism as a place marketer and talent attractor, they can expand your audience reach and add muscle to your message.

- As you did for Trend 5: Stay Close and Familiar, revisit any past visitor and resident studies you or others may have conducted. How do their perceptions either enhance or detract from your appeal?
- 2. Think back to why you decided to live where you live now. What were the deciding factors, are they still relevant, and can these factors be better incorporated into how you package your destination or community?
- **3.** If you were trying to convince a friend to move to your area, what would you say to seal the deal?

THE EVOLVING NOTION OF SAFETY

Safety. It's the number one attribute visitors want in any place or attraction they visit, and any dent in safety they experience is a near-guarantee they won't return. Seems simple enough. But if 2020 has taught us anything, it's that nothing is as simple as it once may have seemed.

So, when we look at the two major forces that have shaped 2020 and will continue to shape our lives in the months and years ahead — the COVID-19 pandemic and the social justice movement — we must recognize how these forces are transforming what safety may mean to us.

HOW COVID-19 INFORMS SAFETY CONSIDERATIONS

A "safe" location is no longer marked by things like low crime statistics, well-lit and wellkept lodging and parking areas, and pedestrian friendly thoroughfares. These things are still important, of course, but with a heightened awareness of sanitization and social distancing protocols, what signifies safety is becoming a little more nuanced. For example, potential visitors are going to want assurances that their rooms are adequately cleaned and sanitized, that employees are getting tested regularly and wearing masks, that infection rates for your area are decreasing, and that your restaurants and attractions strictly observe current best practices and guidelines. From a social distancing standpoint, your outdoor assets will likely be your best friend for some time and should be a clear point of emphasis in your communications. When showcasing people in ads, showing them masked and socially distant can provide a point of assurance for prospective visitors.

HOW THE SOCIAL JUSTICE MOVEMENT INFORMS SAFETY CONSIDERATIONS

The plain fact of the matter is that people who don't feel welcomed in your community or at your attraction will never feel safe with you. This is a major obstacle not just for Virginia but for communities everywhere when it comes to attracting people of color and diverse families. In short, being able to authentically demonstrate your diversity and showcase your equity and inclusivity will be paramount for reaching this demographic.

Of course, the protests themselves add another layer to safety considerations. Places that have witnessed higher levels of protest activity currently face the challenge of assuring both residents and potential visitors that the protests have been, and continue to be, peaceful. However, when violent clashes garner the most coverage, protest activity of any kind can dent a community's reputation as a safe place. On the other hand, a community that embraces racial equity and social change becomes that much more appealing to those who wish to be a part of that movement.

In the end, whether protests mark you as safe or unsafe largely depends on one's personal feelings. Do they support the validity of the movement itself? Do they believe protests are the proper way to call for change? Unfortunately, how a potential visitor answers these questions are simply variables for which no destination or tourism professional can adequately account.

CLOSING THOUGHTS

We realize we've just thrown quite a bit at you, but that's par for the course in 2020, isn't it? We're witnessing change on a massive scale at all levels of our society — from how we live our everyday lives, to how we structure and hold our social and political institutions accountable, to how we safeguard and build more equitable and resilient local, state, national, and global economies.

But rather than view these shifts as overwhelming, we can instead view them through the lens provided by author Arundhati Roy, who suggests: "Historically, pandemics have forced humans to break with the past and imagine their world anew. This one is no different. It is a portal, a gateway between one world and the next."

We hope this guide has provided you with a glimpse into not only how that next world will look and feel, but how you can be a part of building it and thriving in it.

