

Tourism Recovery Dashboard



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Introduction

Since the onset of the global health crisis in March 2020, the tourism sector has experienced a period of prolonged hardship. Destinations around the world have had to dramatically pivot standard business operations and future developments as the pandemic continues. As a critical economic sector, it is imperative for tourism businesses, destination management and marketing organizations, and governments to work together to find creative solutions that can safely support visitors returning and contributing to local economies once again.

The Caribbean Tourism Organization (CTO) and the George Washington University International Institute of Tourism Studies (GW IITS) have partnered to develop practical tools and resources to support tourism industry leaders as they navigate the recovery process. The project was spearheaded by Monica Schmidt and Beth Wright from GW IITS, along with a team of graduate student consultants.

The Implementation Guide that follows is designed to support Destination Organizations (DO) in developing their own **Tourism Recovery Dashboard**, from conception to distribution.

Purpose: Why have a tourism recovery dashboard?

In the Caribbean region, where nations are heavily reliant on tourism revenues, the pandemic will have a deep and sustained impact. According to the United Nations World Tourism Organization (UNWTO), the recovery of the tourism sector to pre-pandemic levels will vary by region. As the Caribbean continues through this extended recovery process, it is important for DOs to equip tourism stakeholders with the tools they need to meet the challenge ahead. One such tool is a tourism recovery dashboard.

By providing stakeholders with an up-to-date tourism recovery dashboard, DOs can better support businesses and tourism planners in making strategic decisions more effectively. Dashboards have successfully been utilized by national, regional and local DOs and generally include: timely tourism sector updates, public health and safety updates, data on the impact COVID-19 has had on destinations, and key indicators for recovery.

Audience: Who benefits from a dashboard?

Anyone who works within the travel and tourism industry will benefit from the information provided in a dashboard, including but not limited to:

- [Travel and tourism businesses](#): accommodations, restaurants, event venues, attractions, tour guides, tour operators, parks and recreation areas, etc.
- [Destination management and marketing organizations and groups](#): Chambers of Commerce, Industry Associations, Convention and Visitor Bureaus, community organizations, etc.
- [Government and Policymakers](#): national, regional and local government, advocacy and lobbying groups
- [NGOs and Educational Institutions](#): nonprofits, international organizations, universities and research institutions

Partners: Who is Involved in creating a dashboard?

The implementation, and continued updates, of the tourism recovery dashboard will require coordination among tourism leaders from the public and private sectors.

It is recommended that a task force is convened to identify the various resources available for inclusion in the dashboard. The task force should include at least one individual who is involved in data collection and analysis for the destination. Within this task force, a dashboard owner should be identified.

Private sector partners, including those from the hotel, airline, cruise, and travel e-commerce industries, may be able to lend valuable insights and data to the tourism recovery dashboard.

Timeline: What is the anticipated time frame?

Destination Organizations can expect to spend up to 3 to 4 weeks on the initial coordination of dashboard partners and resources.

Once procedures around dashboard updates have been established (who and how), it is recommended that the COVID-19 tourism recovery dashboard is updated and distributed on a monthly basis.

As the destination progresses to later stages of recovery, the frequency of dashboard updates should be reduced to monthly.

Process: How is the dashboard updated and maintained?

The process of updating the dashboard will vary depending on the resources and data sources utilized. In general, the dashboard owner should coordinate among the parties responsible for providing information. The dashboard owner would then compile this information within the dashboard template from CTO.

Once the dashboard is updated, it should be published on the industry-facing DO websites, including the government and/or tourism board websites.

Industry association leaders may consider distributing the dashboard among their members.

Lifecycle: What are the next steps?

The tourism recovery dashboard framework outlined in this document is intended to serve destinations throughout the extended, multi-year recovery period. As the recovery of the tourism sector progresses, the dashboard will serve as an ongoing communication tool for DOs and tourism stakeholders.

The dashboard may be repurposed for future events, or continued beyond the immediate recovery (with adjustments) as an ongoing industry tool to gauge sector performance and trends.

How to use this Implementation Guide

This Guide is designed to help Destination Organizations think through the various components that should be included in their destination’s dashboard, and how to access statistics and other data that will comprise the dashboard. The Implementation Guide includes recommendations for:

- Dashboard structure and content resources
- Examples of successful tourism dashboards
- Dashboard style and platform options

The Guide concludes with an easy-to-reference Implementation Checklist that presents a step-by-step action task list to develop and disseminate the dashboard.

Dashboard Structure & Content

The types of information available, and the frequency at which is available, varies between destinations. For this reason, the dashboard structure and content ideas provided below are *recommendations*. DOs should review the information available to them and consider the unique needs of their destination stakeholders when deciding which components to include in their tourism recovery dashboard.

Recommended Dashboard Structure

The following outline details the recommended dashboard components and the order in which they should be arranged within the tourism recovery dashboard. The enclosed dashboard template includes examples of the types of information that may be included in each section.

- I. Introduction**
 - A. Title page
 - B. Explanation of the COVID-19 Tourism Research Dashboard
 - C. Executive summary with key insights from Dashboard
- II. Regional Tourism Sector Updates**
- III. Public Health & Safety Updates**
 - A. Destination COVID-19 statistics and trends
 - B. Tourism sector preparedness, health & safety protocol updates
- IV. COVID-19 Impact on Tourism Sector**
 - A. Visitation statistics
 - B. Lodging and airline performance
 - C. Tourism employment statistics
- V. Recovery Indicators**
 - A. Consumer sentiment updates
 - B. Airline performance indicators
 - C. Cruise industry updates
 - D. Hotel booking activity
 - E. Destination Organization web analytics

Dashboard Content Resources

Regional Tourism Sector Updates

The tourism recovery dashboard should communicate updates from other destinations within the Caribbean region, so that stakeholders can remain informed. The following are resources that may be helpful in compiling regional tourism updates.

Source	Key Statistics	Additional Information	Cost
United Nations World Tourism Organization (UNWTO)	<ul style="list-style-type: none"> Travel restriction status by country 	The United Nations World Tourism Organization's (UNWTO) map of COVID-19 travel restrictions is an excellent starting point to understanding the travel restrictions in place by region and country.	FREE
Caribbean Tourism Organization (CTO)	<ul style="list-style-type: none"> COVID-19 travel protocols by country 	Compiled in a succinct list by country, the Caribbean Tourism Organization's (CTO) COVID-19 updates web page is a comprehensive resource for updates on COVID-19 health and safety protocols by country.	FREE

COVID-19 Health & Safety Updates

The tourism recovery dashboard should communicate up to date statistics about the status of COVID-19 cases both within the destination itself as well as the top source markets from which travelers arrive. This allows tourism stakeholders to understand the underlying factors that are impacting traveler safety and traveler demand. In addition to the resources and data provided by the destination's ministry of health, there are a number of other resources that your organization may find helpful.

Source	Key Statistics	Additional Information	Cost
"Our World in Data"	<ul style="list-style-type: none"> 14-day confirmed COVID-19 cases 	"Our World in Data" provides an interactive chart , by country, that depicts the number of COVID-19 cases on a rolling basis, which helps give tourism stakeholders a sense of the trajectory in the destination <i>and</i> top traveler source markets.	FREE
Johns Hopkins	<ul style="list-style-type: none"> Cumulative cases and active cases Testing rate 14-day confirmed COVID-19 cases 	Johns Hopkins provides a comprehensive overview of COVID-19 cases and deaths at all levels, ranging from global to local. The data from Johns Hopkins is particularly useful for Caribbean destinations that see a high proportion of travelers from the United States. The rolling 14-day case trajectory by state can help destinations and tourism stakeholders identify where to focus their efforts and spending, as the recovery process	FREE

		progresses.	
World Health Organization (WHO)	<ul style="list-style-type: none"> Cumulative confirmed cases 	The World Health Organization offers an interactive “ WHO Coronavirus (COVID-19) Situation Dashboard ” that provides information related to cumulative confirmed cases and deaths by country.	FREE
Pan American Health Organization (PAHO)	<ul style="list-style-type: none"> Sub regional cumulative confirmed cases Epidemiological Situation and Trends 	The Pan American Health Organization has a “ COVID-19 Information Hub ” which presents weekly updates for the region. Information includes a weekly press briefing, and epidemiological situation and trends across the Americas and at a subregional basis.	FREE
Caribbean Public Health Agency	<ul style="list-style-type: none"> Regional cumulative confirmed cases Epidemiological Situation and Trends 	The CARPHA Dashboards provide a Caribbean region specific information regarding the number of cases of COVID-19, mitigation efforts, travel briefs, and country reopening plans.	FREE

Consumer Sentiment

There are a variety of travel organizations that provided free, recurring updates on traveler sentiment. These reports provide valuable and detailed insights on consumers feelings towards travel. In addition to sentiment towards travel, the organizations listed in the chart below have been able to quantify traveler sentiment towards COVID-19 safety precautions, as well as their expectations related to destination health and safety protocols. Tourism stakeholders can use this information to make decisions around business operations, updates to health and safety protocols, and marketing strategies.

Source	Key Statistics	Additional Information	Cost
Destination Analysts	<ul style="list-style-type: none"> Perceived safety of travel activities Sentiment towards future travel Openness to travel planning & inspiration 	Destination Analysts provides a weekly “COVID-19 Travel Sentiment Index”, which is the most comprehensive consumer sentiment tool available at no cost. It is published in both video and presentation format, based on data collected from adult US travelers.	FREE
Miles Partnership/ Longwoods International	<ul style="list-style-type: none"> Impact of COVID-19 on likelihood to travel / plan travel Perceptions of travel safety over time 	This ongoing survey of travelers in the United States, the “ COVID-19 Travel Sentiment Study ”, is published on a biweekly basis, and most of the data points are available at no cost. Each survey release has an accompanying video that summarizes key takeaways and trends.	FREE

MMGY Travel Intelligence	<ul style="list-style-type: none"> Percentage of likelihood to travel Insights on preferred modes of transportation, preferred lodging Traveler concern about COVID-19 	The “ Travel Intentions Pulse Survey (TIPS) ” is published by MMGY on a monthly basis, based on data collected from American travelers. The survey distinguishes itself from other survey tools by providing more in-depth information about traveler sentiments toward transportation, travel activities, lodging preferences, and trip motivations.	FREE
SparkLoft	<ul style="list-style-type: none"> Social sentiment insights 	Sparkloft analyzes social media activity to produce detailed insights on consumer sentiment towards travel and hospitality. Their insight reports are available for a fee.	FEE-BASED
TCI Research	<ul style="list-style-type: none"> Resident sentiment insights 	TCI Research has created a resident sentiment index, which measures residents’ attitude and support towards tourism. This is particularly important during the COVID-19 recovery process, as destinations can assess the comfort level of residents towards increased travel activity.	FEE-BASED

Impact & Recovery Statistics

In order to provide dashboard users with a complete picture of travel performance and travel demand, we recommend that the travel recovery dashboard includes a variety of travel statistics. These statistics should communicate what has already happened (historic data) as well as what is expected to happen in the near future (forward-looking data). Forward-looking data is particularly important, as it allows dashboard users (tourism stakeholders and business owners/operators) to make informed decisions as they move through the recovery process.

Source	Key Statistics	Additional Information	Cost
United Nations World Tourism Organization (UNWTO)	<ul style="list-style-type: none"> Tourist arrivals Airline reservations and seat capacity Hotel searches and bookings, occupancy rates Short term rental booked listings 	<p>The United nations World Tourism Organization (UNWTO) publishes several free tourism recovery resources. The following are recommended to support the compilation of a destination’s tourism research dashboard:</p> <ul style="list-style-type: none"> The UNWTO World Tourism Barometer is published monthly. This resource includes high level information, on a global and regional level, on tourism’s recovery. The UNWTO Tourism Recovery Tracker is a set of dynamic digital dashboards that convey a variety of historic data for visitation, lodging, and airlines, among others. The data is provided at a regional level, and it’s updated on a rolling basis as new data becomes available. 	FREE
Tourism ministry	<ul style="list-style-type: none"> Travel industry 	Statistics from tourism boards and government agencies are	FREE

or tourism board, related government agencies	<ul style="list-style-type: none"> employment rates Hotel occupancy Visitor arrivals, spending 	useful to quantify the ongoing impact of the pandemic on the destination’s travel industry. Statistics such as employment (or unemployment rates) and visitor arrivals and spending should be included in the destination’s tourism dashboard, depending on the frequency of their collection and publication.	
<u>Smith Travel Research (STR)</u>	<ul style="list-style-type: none"> Hotel Occupancy Hotel Average Rate Hotel room supply & demand 	<p>Provides historic data on hotel supply, demand, occupancy, average rate, and RevPAR on a weekly & monthly basis for destinations in which hotels widely subscribe to Smith Travel Research (STR). This information can be compiled by STR on behalf of a country or region.</p> <p>STR can also provide destinations with custom forecasts for the months and years ahead, by request.</p>	FEE-BASED
<u>OAG</u>	<ul style="list-style-type: none"> Airline frequency and capacity trends 	OAG publishes a detailed monthly report that contains airline statistics by region. This report is a useful dashboard inclusion, as it allows destinations and tourism stakeholders to understand the impact and recovery trajectory of COVID-19 on airline seat capacity. The organization also releases <u>frequent blog posts</u> with helpful anecdotal data points.	FREE
<u>Cruise Lines International Association (CLIA)</u>	<ul style="list-style-type: none"> Status updates by cruise line 	<p>The Cruise Lines International Association has a “<u>Cruise Industry COVID-19 Facts and Resources</u>” page that contains links to status updates for member cruise lines.</p> <p>CLIA also periodically publishes research reports based on consumer sentiment surveys of frequent cruise travelers, including a <u>recent report</u> documenting cruise traveler sentiments towards COVID-19.</p>	FREE
Online Travel Agencies: <i>Expedia</i> <i>Booking.com</i> <i>Airbnb</i>	<ul style="list-style-type: none"> Hotel & rental booking volume and pace Hotel Average Rate Cancellation rates 	Online travel agencies have access to a wealth of historic and forward-looking hotel and home rental data, and their regional and/or local account managers are usually happy to provide information and data insights. They are typically on the forefront of booking trends for hotels and home rentals.	FREE
<u>Destination Insights by Google</u>	<ul style="list-style-type: none"> Travel demand trends by country and city Top sources of demand 	<p>Google’s new Destination Insights tool allows destinations to monitor demand for lodging and flights (with the data pulled from Google Search trends). DOs can drill down on a country and city level to understand destination demand over time, and relative to the year prior.</p> <p>DOs can use this new tool, coupled with the existing search trend tool, <u>Google Trends</u>, to understand how demand is trending for their particular destination.</p>	FREE

<u>Sojern</u>	<ul style="list-style-type: none"> • Search volume for hotels & airlines 	Sojern has a free, interactive dashboard that contains historic data on airline and hotel search volume and transaction volume by region (and in some cases, by country).	FREE
<u>ForwardKeys</u>	<ul style="list-style-type: none"> • Airline transactions and seat capacity • Airline data in real-time 	<p>The free “Global Recovery Dashboard” provided by ForwardKeys shows airline ticketing and seat capacity for the current travel month by region and country.</p> <p>The paid version of this service includes the ability to drill down by country on passenger volume, airline tickets, and seat capacity for all future travel weeks.</p>	FREE & FEE-BASED OPTIONS

Other Resources

- **Website analytics:** Each destination’s unique tourism website can provide a wealth of valuable information about travel demand and traveler behaviors. The following are data points that DO marketing and/or website teams may be able to share, for inclusion in the tourism recovery dashboard.
 - Acquisition: How are travelers reaching the DMO website?
 - Site traffic: How many users are visiting the DMO website over time? Is traffic increasing or decreasing? Which website landing pages are receiving the most traffic?
 - Audience demographics: Who is viewing the DMO’s website? Has the user demographic shifted due to COVID-19? Are there specific age groups or places of origin that stand out?
- **Social listening:** Social listening is the process of monitoring social media channels for mentions of your destination and competing destinations, among others. With no cost involved, DOs can track and analyze activity related to their destination on social media; this information, in the form of key insights or even direct quotes from social media users, can become powerful anecdotal content for the tourism recovery dashboard. The following are areas of the destination’s social media presence to analyze.
 - Hashtags: What are consumers saying when they use destination-specific hashtags? Are they excited to visit soon, or still longing until it’s safer to visit?
 - Tagged images: What themes are users expressing through the images they post of the destination?
 - Engagement with destination social media handles: What types of questions and comments are users directing toward the destination? Are they curious about travel safety protocols? Are they eager trip planning ideas?

Example Tourism Research Dashboards

The following are strong examples of COVID-19 tourism recovery dashboards.

Caribbean

- During the summer of 2020, the Belize Ministry of Tourism & Civil Aviation worked with GW and CTO to develop a dynamic **COVID-19 Tourism Dashboard**. The dashboard is now live on the Ministry’s website, and feedback from tourism stakeholders has been positive so far.

US/Canada

- The Tourism Industry Association of Canada’s **State of Tourism in Canada During COVID-19** is a monthly research dashboard. While the title implies a strictly national focus, the research report also provides global tourism industry updates. Also of note is the wide variety of stakeholders that the association consults to update the dashboard, which includes detailed information from airlines, cruise lines, and major tour operators.
- Visit California’s **COVID-19 Research Dashboard** is updated weekly, and provides a variety of information compiled from both free and fee-based resources.

Dashboard Platform Options

One important consideration for DOs is the platform in which the tourism research dashboard is compiled and distributed. This decision will ultimately depend on the resources and expertise of the DO, along with the strategic aims the DO has for the use of the dashboard. The format of the dashboard can range from a simple PDF to an interactive web-based dashboard.

This implementation guide (and attached template) provides a turn key solution for a static dashboard.

- **Microsoft PowerPoint**: The most straightforward and low cost option is to build the tourism research dashboard in Microsoft PowerPoint (PPT). The attached tourism research dashboard template that was developed in PPT. The template can be easily customized and updated by the DO. After building the dashboard in PPT, it is recommended to convert the presentation to a PDF prior to distribution.

Some DOs may opt to create a dynamic online dashboard, using one of the programs listed below. Online dashboards are powerful, as they allow users to interact with the information; however, they can also present additional challenges. One important consideration with interactive dashboards is usability. An interactive dashboard must be user-friendly and intuitive in order to be effective. Another consideration is bandwidth. Many online dashboards require a strong, stable internet connection in order to operate. DOs should take into consideration the bandwidth resources of stakeholders (the end users of the dashboard) when developing an interactive dashboard.

- **Microsoft Power BI**: Microsoft’s business intelligence platform provides powerful data visualization tools. While this option involves higher cost and complexity, it allows for the creation of a dynamic, web-based dashboard that allows users to “play around” with the data.
- **ArcGIS StoryMaps**: Another platform that offers interactive data visualization tools is ArcGIS StoryMaps. This platform was used by the Belize Ministry of Tourism & Civil Aviation to develop their COVID-19 Tourism Research Dashboard.

Action Checklist

Planning

- Identify the organizations and individuals, such as trade associations, government agencies, and private sector travel leaders, among others, that will form the working group responsible for the creation and dissemination of the tourism recovery dashboard
- Determine what information is most important for destination stakeholders that could be presented in a regularly updated dashboard
 - Conduct destination stakeholder consultations (surveys, interviews, focus groups) to determine what information is most relevant to include in the dashboard
 - Review available destination statistics and resources (key areas include tourism sector updates, COVID-19 health and safety updates, consumer sentiment, impact and recovery statistics)
 - Explore other destination dashboards
- Convene all key organizations and individuals to confirm:
 - the purpose of the dashboard
 - the beneficiaries of the dashboard
 - the roles and responsibilities of the organizations that will be involved in creating and disseminating the dashboard (Important to choose one main 'owner' of the dashboard')
 - the estimated timeline to create and disseminate the dashboard including how frequently updates are made (monthly, biweekly, quarterly)
 - the process for how the dashboard will be updated and maintained over time

Dashboard Development & Maintenance

- Determine what dashboard platform is most effective considering destination internet bandwidth. If wifi is weak in your area, consider creating a simpler dashboard (Microsoft PowerPoint template).
- Outline the overall structure and content areas of the dashboard
- Identify which sources will be used to regularly update content with consideration to relevance and information accessibility
- Explore the Destination Organization's web analytics for potential content to include in the dashboard
- Conduct regular 'Social Listening' (social media and online interaction with the destination brand) to glean useful content to include in the dashboard
- Confirm the dashboard style, platform and ownership
- Create a schedule for content updates, contributor meetings, and industry communications
- Before sharing widely, send a pilot dashboard to a diverse group of industry stakeholders for user feedback, make any necessary adjustments
- Where possible, create a cache of information to include in future dashboard updates (destination best practice stories, relevant tools and resources, future events, etc)

Distribution and Monitoring & Evaluation

- ❑ Launch the dashboard with far reaching communications to destination stakeholders (email, social media, DO websites, etc.)
- ❑ Track dashboard interaction activity (website clicks, time spent on site, open rate, etc)
- ❑ Include a mechanism in the platform for users of the dashboard to be able to easily provide feedback