

# ADVOCACY 2020 SUMMIT

SEIZING THIS OPPORTUNITY

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Summit Program Book



DESTINATIONS  
INTERNATIONAL



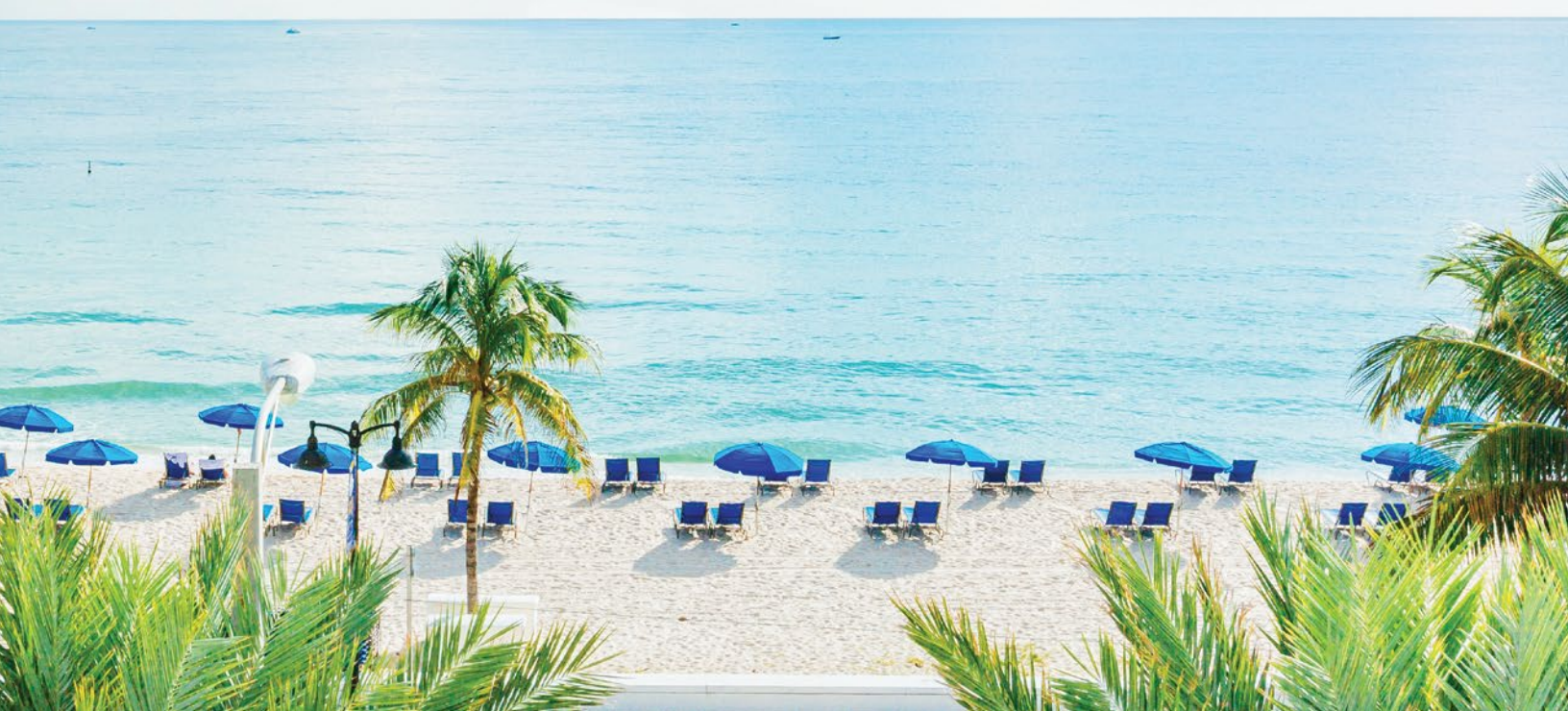
DESTINATIONS  
INTERNATIONAL  
FOUNDATION



# VISIT LAUDERDALE OPEN FOR MEETINGS

The Greater Fort Lauderdale/Broward County Convention Center \$1 billion expansion project is underway. The transformed venue incorporates ASM Global's *VenueShield* environmental hygiene protocol to provide the highest levels of cleanliness and safety.

And with Visit Lauderdale's Safe + Clean Pledge you can be assured that hotels, restaurants, attractions and other businesses are going above and beyond to keep your group safe and healthy. The expanded convention center opens in phases beginning in October 2021 with full completion anticipated in 2024. Be among the first to reserve your meeting space between 2021 and 2024 and it could be free. Learn more about our \$10 million in free meetings space offer at [sunny.org/meetings](https://sunny.org/meetings)



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# DEAR COLLEAGUE,

Though we would of course rather be meeting in person, we are very excited to welcome you to our virtual Advocacy Summit. This is the fourth annual Advocacy Summit that is put on solely by the Destinations International Foundation with the help of our Advocacy Committee. Proceeds from this event are invested into the advocacy, research, education and talent development work we do every day to support destinations around the world. And they need our help now more than ever before.

There is no doubt that these have been some of the most significant and challenging times our industry has ever faced. We are at a time when the fundamentals of our organizations are changing – sometimes almost daily. Let's take advantage of these opportunities to push ourselves and our organizations to new heights so that when we make it to the other side, we will be stronger than ever before.

This summit program book is comprised of industry research from our event sponsors and resources from our advocacy team that we hope you will be able to use during the summit and also utilize during your daily work.

We would like to extend a big “thank you” to our Advocacy Summit sponsors. Thanks to their support, we are able to continue putting on this critical event.

Sincerely,



**Don Welsh**  
President and CEO,  
Destinations International



**Jack Johnson**  
Chief Advocacy Officer,  
Destinations International



**John Lambeth**  
Board Chair,  
Destinations International Foundation  
Civitas



**Annette Rummel, Ph.D., CDME**  
Advocacy Committee Chair,  
Destinations International  
Trailblazer and CEO,  
Great Lakes Bay Regional CVB

# OCTOBER 15

# AGENDA

**Welcome Coffee**  
9:45AM - 10:00AM

**Learning from Our History:  
Detroit 1896 to Today**  
10:00AM - 10:20AM

**Can Advocacy Accelerate Recovery?**  
10:30AM - 10:50AM

**Destination Safety: The New Priority**  
10:50AM - 11:20AM

**Advocacy Solutions Case Studies**  
11:30AM - 11:55AM

**Advocacy Solutions Case Studies**  
12:00PM - 12:25PM

**Lunch Break**  
12:25PM - 1:00PM

**The Importance of Resident Sentiment  
in a Crisis**  
1:00PM - 1:30PM

**The Unusual Suspects: The Community  
Benefit Funding Model**  
1:35PM - 2:10PM

**Community Engagement and  
Grassroots Lobbying**  
2:15PM - 3:05PM

**Lexicon 2020: Expanded with New  
Words to Know and Use**  
3:10PM - 3:40PM

**Shirtsleeve Roundtable Discussions**  
3:45PM - 4:15PM

**Closing Keynote: Rebecca Ryan**  
4:20PM - 5:00PM

**Closing Remarks & Yappy Hour**  
5:00PM - 5:35PM

*All Times ET*

# NOVEMBER 12

# AGENDA

**Welcome Coffee**  
9:45AM - 10:00AM

**Election Insights and Policy Outlook**  
10:00AM - 10:30AM

**A Conversation with Sacramento Mayor  
Darrell Steinberg**  
10:30AM - 10:50AM

**The Business Case for Equity, Diversity  
& Inclusion**  
11:00AM - 11:25AM

**Advocacy Solutions Case Studies**  
11:30AM - 12:30PM

**Break**  
12:30PM - 1:00PM

**What Keeps Us Up at Night**  
1:00PM - 1:30PM

**No More Excuses: Working with  
Economic Development Partners**  
1:30PM - 1:50PM

**The Architecture of an Advocacy Plan**  
2:00PM - 2:50PM

**Destinations International Products as  
Advocacy Tools**  
3:00PM - 3:25PM

**Advocacy Shirtsleeves**  
3:30PM - 4:10PM

**Looking Forward to The Next Normal**  
4:10PM - 5:00PM

**Happy Hour**  
5:00PM - 5:30PM

*All Times ET*





# **DESTINATIONS INTERNATIONAL RESOURCES**

# THE COMMUNITY BENEFIT FUNDING MODEL: IF THEY VALUE YOU, THEY WILL FUND YOU.

*Destinations International Advocacy Team*

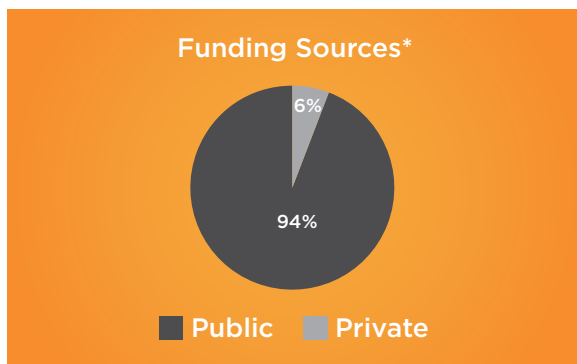
We are in what we call the Great Interruption. A pandemic, civil unrest, widespread unemployment, a recession, natural disasters—all made worse by the trend to politicize everything. Normalcy has been upended. Patterns of behavior and supply chains that we relied on have been disrupted. Government budgets are wrecked. Deficits are at an all-time high. Serious rebuilding will need to take place — rebuilding of confidence and of structure.

These realities can draw all our focus if we allow it. However, we cannot stop thinking about the future that will come. We need to start thinking — not about a return to normal — but about the next normal. And we should use this time to not only think about what things may look like but what changes will have occurred that are not going away. We need to think about how we would like them to look so that we can begin that work as we navigate this Great Interruption.

Where better to start than with funding? It is core to what we do, it is our biggest concern and, frankly, it is overdue to kick some ideas around.

## OUR CURRENT FUNDING MODEL

Before we begin to discuss our funding model evolution, it's important for us to take stock of our current funding model. How are destination organizations currently funded?



According to our data, over 90% of destination organization funding comes from public sector sources.

\*Source: Destination Organization Performance Reporting

Let's break down this further: The mainstay of every destination organization is the hotel, transient occupancy, or room-night tax. This "heads in beds" levy is collected at the hotel and remitted to the government to allocate in its entirety or some percentage to the destination organization. This "transaction" through government, no matter the level, makes the destination organization the recipient of public money.

Many destination organizations have worked to expand their funding beyond the hotels, with money levied from the traditional sales tax or taxes on transactions on food and beverage, short-term auto rentals, airport livery fees or convention centers.

We argue that through destination stewardship and brand promotion, destination organizations strengthen the community's economic position and vitality, which provides opportunity for all the people in the destination.



## WHO BENEFITS?

When we ask ourselves to re-imagine a funding model for destination organizations, we should start with the question, who benefits from our success?

We'll start with the usual suspects. These are the guys that we've always known will benefit from your organizations.



### The Usual Suspects

First there are hotels. An effective destination organization puts heads in beds. That's so obvious that hotel room-nights has been the metric of success of for destination organizations for a century. We are such a valuable partner to the hospitality industry that they are happy to fund our work with their occupancy taxes. When occupancy taxes don't generate enough revenue, they create TIDs or join membership programs to kick more funding our way.

Then we've got venues. Sports arenas, theaters, cultural centers and conventions centers all rely on destination organizations to sell tickets and fill their seats. In many of your destinations, venues charge a levy on ticket sales that to help fund your destination organization.

Likewise, there's events. Again, dependent to a large extent on destination organizations and often contribute to their funding.

We've got car rentals. Restaurants. Attractions. Taxis. Tour operators.

We can think about this as the whole tourism vertical, all obviously benefitting from the destination organization. And we as an industry have gotten good at developing models to fund our organizations based on the benefit they deliver to these stakeholders.

But by focusing exclusively on the tourism vertical, we ignore any number of

industries, organizations, businesses and other stakeholders in your community who benefit from your work. What we could call the unusual suspects.



### The Unusual Suspects

Let's start with an obvious one: Airports. Clearly these benefit from the destination organization. It's no leap to say that more destination marketing means more business for airports. But our research shows that very few airport authorities kick anything into destination marketing budgets through departure fees or any other kind of assessments.

But let's think even more outside the box. Start with the truism that a great place to visit is a great place to live — and a great place to live is a great place to work. Then we need to look at companies putting people to work in your community. Employers in your community rely right now on the strength of your brand to attract and retain the best employees. When they go out recruiting, they talk about what a great place to live your community is. They depend on your effectiveness and have a vested interest in your success. And yet, the vast majority of you have no mechanism that commits major, bedrock employers in your community to the success of your organization.

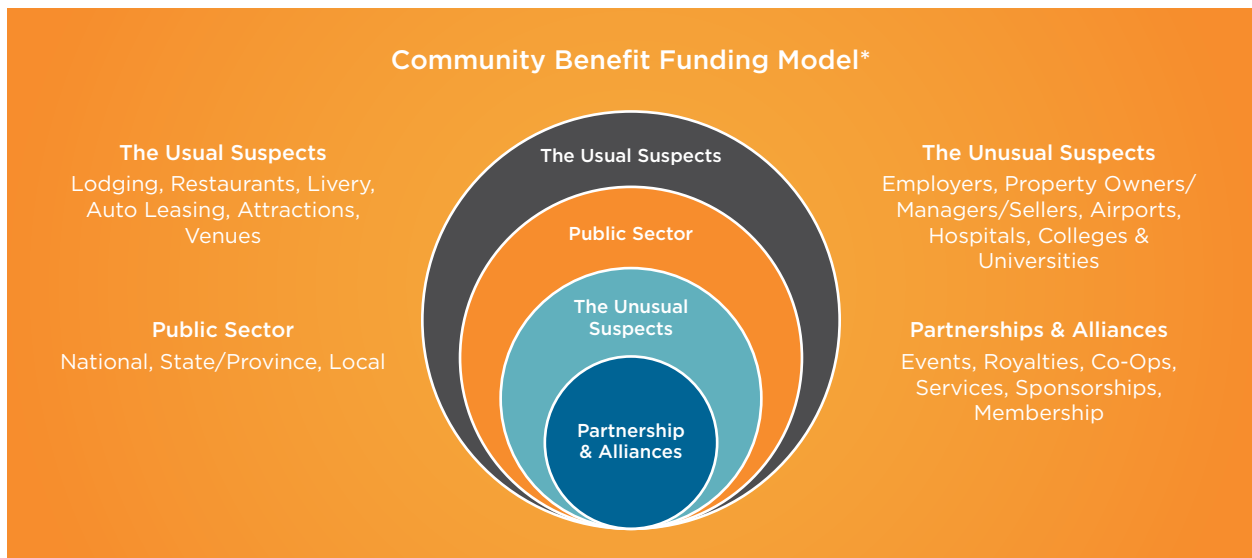
Let's look at one example.

In countless communities — especially small communities — hospitals and healthcare networks are the largest employers in town. When they go out to recruit doctors and other staff, they talk about the high quality of life in your community. Not only that, in some cases, they fall back on the strength of your brand to attract patients. But we're not aware of any destination organization that collects funding from hospitals.

The same can be said for colleges and universities in your destination. Think about every piece of marketing material that universities in your destination put out that talk about what a great place your destination is to go to school. A destination organization with a brand that resonates to young people is an invaluable asset to universities. And don't forget that they are also in competition with every other school to attract the best faculty—and one of the strategies that they use is to talk about what a great place to live your community is.

We could go on and on picking out industries that benefit from your work. The fact of the matter is that when you define a stakeholder by whether they derive benefit from your organization, then your network of stakeholders is much wider than your funding models suggest. This means there are many, many stakeholders in your destination benefitting from your work, but who have no skin in the game.

So how do we get them to value the benefit you deliver and to fund the work you do?



You are their competitive advantage, but you have no mechanism for them to support your great work.

So you're out there demonstrating what a great place to live your destination is, and when you've got all these partners attracting investment, attracting business, and attracting workers, what is the effect on real estate in your destinations?

More demand for real estate naturally means higher property values. That means homeowners — even if they've never heard of you — suddenly benefit from your great work. Commercial real estate prices rise, which means commercial real estate investors, developers and building managers all have a stake in your organization. Realtors benefit from more demand for property and higher sales prices.

### THE COMMUNITY-BENEFIT MODEL

We argue that a destination organization is a community asset responsible for programs promoting a community as an attractive travel destination and enhancing its public image as a dynamic place to live and work. Everyone benefits — some more directly than others, some much more directly than others. If that is the case, then our funding should represent that.

James W. Frick, an administrator at the University of Notre Dame was famous for saying “Don't tell me where your priorities are. Show me where you spend your money, and I'll tell you what they are.” If we are the priority, as we say we are, it is time to reflect that in our funding.

\*Source: Destinations International Foundation 2020

We believe that destination organizations must look beyond the Usual Suspects and find ways to generate funding from the Unusual Suspects — as well as from the public sector and from traditional partnerships. We do not recommend any specific percentage that these four groups should represent of your funding. Conditions on the ground in each destination would influence that. The point here is that there are more sectors that should be contributing to your efforts than just hotels and a general membership.

Let's start in the largest circle — the usual suspects. This is a group that I would think should make up the biggest chunk of your budget. These entities are impacted in a greater amount and are, frankly, are first in line in terms of receiving an impact of what you do.

Lodging — hotels, bed & breakfasts, shared housing and campgrounds — there should be no argument there. Restaurants — perhaps only in a section of the destination or those of a certain size — but while these restaurants serve residents, many cannot operate at a profit without the visitor and, therefore, would not exist without visitors. The same is true of livery, auto leasing, attractions and venues. All of these can be structured to limit their impact on residents, but all should be at the table. Many of these are already at the table with membership dues, many at higher rates than the average member. But they should be there, along with the hotels, at higher numbers.

There are three way to collect this money — voluntary assessment, often problematic; a sales tax on transactions, a very effective means but subject to diversion by the taxing authority; or a Tourism Improvement District where the money is outside of government and you contract with the government to collect and enforce. The final one is my preferred approach and has been successfully be enacted, primarily with hotels, in many places. But if the industry will not step up, government action may be your only resort.

The second circle is government. Beyond the sales-based tax collected on from the usual suspects, government should chip in an additional amount, for they in the end

benefit the most. A vibrant and growing economy means vibrant and growing tax revenues and low unemployment means saving in many other places in the budget. Whether from the general fund, a special (and probably new) grant program or portions of departments and sub divisions budgets (perhaps from the public relations or communications budget lines), the key here is that there is a benefit to every level of government and therefore, every level should be throwing in resources.

The third circle is the Unusual Suspects. These folks have a vested interest in your success, but they are not throwing in resources. The reason will need to be explained to them, the benefit quantified, and a relationship between you and them developed. But it is time they have skin in the game. This can be done through fees on transactions or some other kind of sales tax on services or it can be a direct contribution from their budgets — but it needs to be done.

Finally, the smallest circle is the destination organization itself. Through events, royalties, co-ops, services, sponsorship, membership — and creative monetizing of non-revenue generating assets — the destination organization shows that it is willing to carry part of the burden themselves.

## **THE TIME TO START WORKING**

We believe that the more diverse and the more broad-based your funding sources are and the more your funding truly represents a community investment in your efforts, the safer and more robust your revenues will be.

The Great Interruption that we are in will not end soon, but it will end. That is why now is the time to start the conversation. The time to evaluate our options. The time to develop a plan. And the time to start working on changes.



# THE 2020 TOURISM LEXICON: UNITED STATES AND CANADA

Destinations International has made the case that relying merely on ROI numbers to defend the value and relevancy of a destination organization was no longer a viable advocacy strategy. Instead, we argued, destination organizations need to support the message of ROI in terms of dollars and cents with an emotional and value-based appeal to convince political leaders and community stakeholders that without a destination organization, these returns will inevitably vanish.

In our policy paper “The New Tourism Lexicon: Rewriting Our Industry’s Narrative,” we pointed out that our industry has unfortunately fallen for what George Lakoff, a professor of Cognitive Science and Linguistics at the University of California at Berkeley, dubs the “Enlightenment Fallacy.” According to this viewpoint, you simply need to tell people the facts in clear language and they will reason to the right, true conclusions. The problem, as Lakoff puts it is, “The cognitive and brain sciences

have shown this is false...it’s false in every single detail.”

The reality is that people tend to frame political arguments, and the facts behind them, in terms of their own values. What this means, essentially, is that words matter in politics, and those words need to be chosen carefully and need to carry an emotional connection that connects with people’s values and the values of our industry.

## **THE VALUES OF THE DESTINATION ORGANIZATION COMMUNITY**

Values are important and are lasting beliefs or ideals shared by the members of a community about what is good or bad and desirable or undesirable. They serve as broad guidelines in all situations and are important in the way we live and work. Core to our industry are those values we hold that form the foundation on which we perform work and conduct ourselves. These are so important to us that throughout the



changes in society, politics, and technology they still are the foundation upon which we build our organization and develop our programs.

Destinations International identified the following eight values that our industry embodies (or should embody). Each organization within our sector has additional values that make them unique and tie them to their destination.

- **Awareness:** Concern about and well-informed interest in a situation, topic, or development. We are aware. We ask questions. We research. We engage. And most of all, we listen. We are well informed about our community, its past and its present, and we understand the hopes and dreams the people of our community — our home.
- **Passion:** An intense desire or enthusiasm for something. We are passionate about our destination. We have a strong desire to strengthen the community's economic position and vitality and provide opportunity for all its residents. And it is with enthusiasm and eagerness that we seek to tell the world the story of our destination, of our history, of our culture, of our community and of our people.
- **Relevance:** Closely connected or appropriate to what is being done or considered. We are relevant in our community. Our leadership, expertise and acumen is understood and valued. Our community depends upon our programs achieving our mission.
- **Transparency:** Open to public scrutiny. We gladly inform our stakeholders and the community about what we do, how we operate and our return on investment. This means that in addition to sharing our successes and victories, we also share when we have fallen short or failed. We seek to be responsible and accountable without any prompting or prodding.
- **Collaboration:** The action of working with someone to produce or create something. Effective collaboration contributes to our success. We work together with our customers, members,

clients, suppliers and community stakeholders to reach our goals. We seek to empower these people with better sharing of information to improve our capacity to solve key problems, which ultimately leads to new innovations and approaches.

- **Inclusiveness:** Not excluding any section of society or any party involved in something. We welcome all into the fold. No one is turned away. We always strive to find ways to bring new people, new perspectives, and new ideas into our universe and through this, develop a clear, honest and positive image of the destination's brand that reflects everyone with our community.
- **Innovation:** Make changes in something established, especially by introducing new methods, ideas or products. We understand that while the organization's values are unchanging, the means to achieving them are not. We welcome new ideas and fresh perspectives. We embrace and use new technologies and platforms to tell our story.
- **Sustainability:** The ability to be maintained; avoidance of the depletion of resources to maintain balance. We understand that we are building value not for ourselves but for our customers, members, stakeholders and future generations. We understand that this must be done in a way that maintains our community and our assets, and preserves our brand while growing opportunity.

## THE NEW TOURISM LEXICON

If we are going to be successful in changing the narrative surrounding our industry, it starts with a values-based approach. That means talking to stakeholders in a manner that is simple and emotional and connects their values to your organization.

Utilizing Quorum, the world's most comprehensive database of legislative information, we were able to build a list of key words that were used repeatedly by elected officials when talking positively about travel and tourism. Positive words like "community," "people" and "work"

showed up repeatedly. We then ran an analysis of political discourse around related topics and public goods and found that many of the same key words were being repeated by political leaders. In 2018 we released a list of 10 key words. A year later, we updated that list and expanded it to 20 words.

Today, we are releasing our 2020 edition and expanding the list to 30 words. This is a United States version with other countries in the works. This list is a result of running searches in five general areas that are public goods at the combined local, county, state and federal level in the United States. The result was 1,585 words from 1,519,376 entries taken from the external communications, including social media posts, newsletters, and press releases of elected officials across the United States.

In selecting the words, we started by eliminating words that are numbers, people, places and names. We eliminated “shop talk” — words associated with government process. Then we eliminated connecting words like “and” or “to” as well as words that are clearly connected to but are not the actions and subject of sentences and thoughts — words like “going” or “say.” It is those actions and thoughts that are what we are after.

## UNITED STATES LEXICON DURING THE GREAT INTERRUPTION

The 2020 search reflected the current events with words like COVID-19, pandemic, and others as well as words associated with activities to combat the virus, reopening plans, and a rise in health-related words like “cases.” The word “health” came in #13 out of 1,585 words. The highest-ranking location to show up in the list is “New York,” which was a center of the pandemic for many months. “Hospitals” replaced “schools” as a highly ranked civic location.

Perhaps related to the pandemic and the federal government’s efforts to push authority down to the states, units of local government and states are highly placed on the list. The words “city,” “county” and “state” are all in the top ten. Words associated with the federal government are

much lower. “national” shows up at #219 and “Washington” shows up at #446.

The current civil unrest that began with death of George Floyd is also represented in the 1,535 words with Floyd being the highest-ranking person on the search list. Words associated with protest, marches, police, and justice are also highly ranked.

It is worth noting that the word “visit” ranked #215, “welcomed” ranked #313, and “travel” ranked #447 in our public good search. There remains work to be done to solidify our position.

But perhaps the biggest change is words moving to the top that are associated with what people need and want as well as the need for plans, information, and knowledge to address the problems before us. This leads us to the 2020 #1 word.

## THE UNITED STATES LEXICON

### 1. KNOW

To be aware of through observation, inquiry, or information; to have developed a relationship with a person or a people through meeting and spending time with them; to be familiar or friendly with.

**Associated industry value:** Awareness.

This is the first appearance of this word on Destinations International’s key word list and at first, we were not sure whether to include it. But the fact that it was not only the number one word on the search list, but number one by a clear margin made it hard not to place it on the list. That combined with the definition — to be aware — sealed the deal. “Know” is a word that ties back to one of the key values of our industry — awareness. And in this time of pandemic and civil and economic unrest, it goes to the core of what people are seeking — to know what the problem is and to know what solutions may exist.

### Possible uses:

- A destination organization *knows* its community — better than any outside consultant can.
- We seek to *know* the answers to key questions, such as: do our residents feel safe enough to invite visitors? Do visitors feel safe to visit our destination?

- Need help exploring our destination? We *know* our way around. We have this knowledge because we are a local.

The next 29 words are as follows in the order that they ranked.

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## 2. PEOPLE

Human beings considered collectively; the men, women, and children of a nation, community, or ethnic group; a group of people inhabiting an area or place; the people within a destination.

**Associated industry value:** Passion, Collaboration and Inclusiveness.

**Possible uses:**

- If you build a place where *people* want to visit, you have built a place where *people* want to live. If you build a place where *people* want to live, then you have built a place where *people* want to work. If you build a place where *people* want to work than you have built a place where employers want to locate. It all starts with a visit.
- Destination organizations exist to help and support the *people* in our community.
- A destination brand is not a slogan or an ad campaign; it is the sum of a the history, character and culture of the *people* of a destination.

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## 3. COMMUNITY

A group of people living in the same place or having a characteristic in common; a feeling of fellowship with others, because of sharing common attitudes, interests, values, and goals; residents of a destination.

**Associated industry value:** Passion and Relevance.

**Possible uses:**

- Tourism builds *community*.
- Addressing the need for destination promotion is for the benefit and well-being of every person in a *community*.
- Destination promotion is an essential investment to develop opportunities and build quality of life to benefit all the residents of a *community*.

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## 4. TIME

To plan, schedule, or arrange when something should happen or be done; measure the time taken by a process or activity; an instance of something happening or being done; an occasion or a moment.

**Associated industry value:** Innovation, Sustainability.

**Possible uses:**

- During this Great Interruption, it is important to take this *time* to plan for the Next Normal.
- Destination organization employees are professionals who take the *time* to learn the industry, its trend and its habits, and identify what opportunities exist for our community.
- We understand that our history is a collection of *times* made up of individual moments that make us who we are.

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## 5. HEALTH

The state of being free from illness or injury; a person's mental or physical condition; state of a community's economic and societal position.

**Associated industry value:** Passion and Relevance.

**Possible uses:**

- The *health* of our community's economy depends on a strong travel economy.
- Residents and visitors alike are understanding the *health* needs to embrace face masks and social distancing in public spaces.
- The *health* of our residents is our number one priority!

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## 6. WORK/WORKING

Activity involving mental or physical effort done to achieve a purpose or result; a task or tasks to be undertaken; something a person or thing must do; a job.

**Associated industry value:** Awareness, Relevance, Sustainability

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**Possible uses:**

- In 2019, we put 15.8 million people to *work* in big and small communities across our country.
  - Our industry puts people to *work* who have every range of education level.
  - One in 10 people *working* in non-farm jobs are directly or indirectly relying on the travel industry.
  - We *work* to sustain our destination in a way that maintains our community and our assets, and preserves our brand while growing opportunity.
- 

**7. PUBLIC**

A need or something concerning the people as a whole or done, perceived or existing in open view.

**Associated industry value:** Collaboration, Inclusiveness, Transparency.

**Possible uses:**

- A destination organization is a *public* good that fills a *public* need.
  - In the end, a destination organization serves the *public*. It is why they exist.
  - We operate in the *public* for the *public*. We share our successes and victories; we also share when we have fallen short or failed.
- 

**8. BUSINESS**

A person's regular occupation, profession, or trade; the practice of making one's living by engaging in commerce; an entity that creates jobs.

**Associated industry value:** Sustainability

**Possible uses:**

- The travel industry creates and supports more small *businesses* than any other major sector. 83% of travel companies are considered small *businesses*.
  - Travel promotion is *business* development.
  - U.S. residents logged 464.4 million person-trips for *business* purposes in 2019, spurring economic development everywhere.
  - We are in the *business* of community building.
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**9. NEED**

To require something because it is essential or very important; a thing that is wanted or required.

**Associated industry value:** Awareness, Sustainability.

**Possible uses:**

- Every community *needs* to compete with every other community for their share of the world's attention, customers, ideas and investment. This is the community *need* that a destination organization fills.
  - A community *needs* destination promotion just as it *needs* education, health care, public safety and utilities.
  - Our travel economy must be developed with the *needs* of the community in mind.
- 

**10. NEW**

Not existing before; made, introduced, or discovered recently or now for the first time; already existing but seen, experienced, or acquired recently or now for the first time; just beginning or beginning anew and regarded as better than what went before.

**Associated industry value:** Innovation, Sustainability.

**Possible uses:**

- Our destination offers *new* experiences for visitors which results in *new* opportunities for our residents.
  - We welcome *new* ideas and fresh perspectives. We embrace and use *new* technologies and platforms to tell our story.
  - We work with *new* technologies, but our approach is rooted in our true and tested values.
- 

**11. WANT**

A lack or deficiency of something; a desire for something; a community need.

**Associated industry value:** Awareness, Inclusiveness.

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### Possible uses:

- We *want* everyone in our community to feel welcome.
- We *want* our staff to feel appreciated and respected.
- Our community *wants* information, opportunity and jobs.
- We appreciate and seek to address the needs and *wants* of all the communities in our destination.

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## 12. SERVICE

The action of helping or doing work for someone; a system supplying a public need such as transport, communications, utilities, or destination promotion.

**Associated industry value:** Awareness

### Possible uses:

- Our success is our *service* to you and your experience in our destination.
- An experience in our destination means a level of *service* above and beyond.
- A destination organization does not operate to generate a profit, it operates as a *service* to the community.

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## 13. QUESTION

A sentence worded or expressed to elicit information; feel or express doubt about; raise objections to; seek an answer or test an approach.

**Associated industry value:** Awareness, Innovation, Sustainability

### Possible uses:

- The two *key questions* now are: do our residents feel safe enough to invite visitors, and do visitors feel safe enough to visit our destination?
- We are aware. We ask *questions*. We research. We engage. And most of all, we listen.
- We seek to be the best and periodically, *question* our plans and strategies to make sure they meet the needs of our destination.

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## 14. PROGRAM

A set of related measures or activities with a long-term aim, an activity that solves a problem.

**Associated industry value:** Innovation, Relevance.

### Possible uses:

- A destination organization is a community asset responsible for *programs* promoting a community as an attractive travel destination and enhancing its public image as a dynamic place to live and work.
- A destination organization creates promotional *programs* to share the brand of our destination.
- We develop *programs* that solve problems and fill needs.

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## 15. INFORMATION

Facts provided or learned about something or someone; what is conveyed or represented by an arrangement or sequence of things; an answer to a question.

**Associated industry value:** Collaboration, Transparency,

### Possible uses:

- Currently, people need *information* on how to support our stakeholders and to operate day to day in this current situation.
- We are the number one provider of *information* about every aspect of our destination.
- Our goal is to understand the needs and wants of our community and to provide *information* to address them.

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## 16. PLAN

A detailed proposal for doing or achieving something; a detailed map or diagram; decide on and arrange in advance.

**Associated industry value:** Innovation, Collaboration, Sustainability, Passion.

### Possible uses:

- We will continually evaluate our mission and priorities based upon our strategic *planning*.

- We build *plans* and programs that maintain our community and our assets, and preserve our brand while growing opportunity.

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## 17. HELP

To make it easier for someone to do something by offering one's services or resources; the action of helping someone to do something; to aid.

**Associated industry value:** Awareness

**Possible uses:**

- We are here to *help*.
- Our mission is to *help* and advance our community.
- Our goal is to *help* our community create quality of place, which directly influences the quality of life.

---

## 18. MEETING

An assembly of people, especially the members of a society or committee, for discussion or entertainment; a coming together of people, by chance or arrangement.

**Associated industry value:** Innovation, Sustainability

**Possible uses:**

- *Meeting* in person is paramount and our service to you and your opportunity will be unwavering.
- Your first experience in our destination might start with a *meeting*, but we will ensure it will not be your last.
- Nothing has or will totally replace people *meeting* face to face and in person.

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## 19. NEXT

Coming immediately after the time of writing or speaking; coming immediately after the present one in order, rank, or space; the immediate future.

**Associated industry value:** Innovation

**Possible uses:**

- We need to prepare for the future, the *next* normal.
- For us, quality service will remain for your *next* visit.

- Destination organizations are always looking for the *next* practical action or strategies for sustainable success in a dramatically changing world.

---

## 20. CARE

The provision of what is necessary for the health, welfare, maintenance and protection of someone or some place; serious attention applied to doing something correctly; look after and provide for the needs of.

**Associated industry value:** Awareness, Inclusivity, Sustainability.

**Possible uses:**

- We *care* about the people in our community. They are our number one priority.
- Destination promotion is done out of *care* for the health and welfare of our community.

---

## 21. SUPPORT

To bear all or part of the weight of; hold up, give assistance to; enable to function; material assistance.

**Associated industry value:** Collaboration, Relevance

**Possible uses:**

- You have a story to tell about how travel *supports* your community and the economy.
- Our community is *supported* by our programs achieving our mission.
- We *support* our stakeholders.

---

## 22. PROJECT

An individual or collaborative enterprise that is carefully planned and designed to achieve an aim.

**Associated industry value:** Active

**Possible uses:**

- Our promotional *projects* are carefully planned and designed to achieve their aims.
- The success of our destination is our *project*.

- We do not do marketing — we have destination promotional *projects* and programs.

---

### 23. PROVIDE

Make available for use, to supply, or to make adequate preparation for something; to give a service.

**Associated industry value:** Relevance

**Possible uses:**

- We *provide* the raw material for economic development — people!
- We *provide* information, answers and help not only to our visitors but to our residents.
- Destination organizations are a great entity to *provide* new civic ideas.

---

### 24. OPEN

Allowing access, passage or a view through a space; not closed or blocked up; officially admitting customers or visitors; available for business; frank and communicative; not given to deception or concealment.

**Associated industry value:** Transparency, Inclusiveness

**Possible uses:**

- We operate in the *open* and are *open* to public scrutiny.
- We are *open* to new people, new perspectives, and new ideas.
- Our destination is *open* for visitors from around the globe.

---

### 25. HOME

The place where one lives permanently, especially as a member of a family or household; a place where something flourishes, is most typically found, or from which it originates; the goal or end point.

**Associated industry value:** Passion, Sustainability

**Possible uses:**

- Our destination is our *home*.
- We understand that our destination is our *home* and therefore, we seek to maintain our community and our assets, and preserve our brand while growing opportunity.

- Our destination is our *home* and because of that, we seek to see it flourish.

---

### 26. AVAILABLE

Able to be used or obtained; at someone's disposal.

**Associated industry value:** Awareness, Inclusive

**Possible uses:**

- We are *available* to offer our talents and knowledge to any civic endeavor.
- We are *available* to help the meeting planner, event organizer, entrepreneur and site selector.
- Our greatest strengths are our local knowledge and customer *availability*.

---

### 27. LOCAL

Belonging or relating to an area or neighborhood, typically exclusively so.

**Associated industry value:** Relevance

**Possible uses:**

- Destination organizations are *locals* working for *locals*.
- We are your *local* expert.
- We do not need to learn about our destination like a hired firm would need to do because we live here — we are *local*.

---

### 28. FAMILY

A group of people related to one another by blood or marriage; all the descendants of a common ancestor; a group of related things.

**Associated industry value:** Awareness, Inclusiveness

**Possible uses:**

- A destination organization's mission is at its heart, to help our community — our neighbors, our friends, and our *families*.
- Our destination organization is staffed by professionals that live in our community. They do what they do not for some bottom line — they do it for their own *families* in addition to everyone else's.
- A destination is a collection of *families* that we take great care with.

---

## 29. ECONOMIC DEVELOPMENT

The creation of wealth from which community benefits are realized; an investment in growing the economy and enhancing the prosperity and quality of life for all a community's residents.

**Associated industry value:** Sustainability

**Possible uses:**

- Through destination stewardship and brand importance, destination organizations strengthen the community's *economic development* abilities and its vitality, which provides opportunity for all the people in the destination.
- A destination organization is an *economic development* organization.
- Travel promotion is an instrument of both short- and long-term *economic development*.

---

## 30. FUND/FUNDING

Money provided, especially by an organization or government, for a particular purpose.

**Associated industry value:** Sustainability

**Possible uses:**

- Each household in America would pay an additional \$1,398 in taxes without the *funds* provided governments through travel and tourism.
- The results of travel spending *funds*, first responders, health professionals and teachers.
- *Funding* a destination organization is an investment in our community's future.

## CANADA

After releasing the 2020 United States version of the New Tourism Lexicon, we released the first ever 2020 Canadian version. This represents the first time we are offering country specific results.

This list is a result of running searches in five general areas that are public goods. The result was 1,598 words from 7,000 entries taken from the external communications, including social media

posts, newsletters and press releases of federal elected officials across Canada.

## CANADIAN LEXICON DURING THE GREAT INTERRUPTION

The 2020 search reflected the current events driven by the COVID-19 (ranked #126) outbreak with words like "pandemic" (ranked #61), "virus" (ranked #95) and "emergency" (ranked #157) in the top 250 and others ranked very highly in the overall list. We also find words associated with activities to combat the virus (testing #94, distancing #141, mask #201) and other health-related words (care #16, case #23, medical #165). Most prominently, the word "health" came in #3 out of 1,598 words.

Unlike the United States Lexicon, government words ranked highly reflecting a more socialized environment and history that sees government as having a more active role in the society and the economy. It would appear to be seen as having a very active role in combating this crisis. "Government" ranked #19 with other government-related word throughout the top 250 words. The highest ranking "province" (#9) was "Ontario" (#67) as we would expect as both a highly populated province and the seat of the federal government. Following in the top 500 was "New Brunswick" (#86), Saskatchewan (#197), Quebec (#354), Alberta (#367) and Newfoundland (#488).

It is worth noting that the word "travel" ranked very highly (#91) in our public good search. "Tourism" ranked #216. But related words like "visit" and "welcomed" were nowhere close to it suggesting that the terms may be as much related to the pandemic as it is to our industry sector. There remains work to be done to solidify our position.

But perhaps the biggest change is words moving to the top that are associated with what people need and want as well as the need for plans to move forward, useful information, and knowledge to address the problems before us. Words like "know" (#2), "question" (#13), "plan" (#63), "program" (#73), information (#88) and "forward" (#97). We also find words



like “first,” “second,” “third” or “one,” “two,” “three” highly ranked and suggesting steps of a plan. In our mind, this provides us with an opportunity.

But the center of everything we do is about people and this is reflected in the list. “Canadian” (#48), “worker” (#50), “family” (#56), “everyone” (#69), “child” (#90) and “resident” (#156). This leads us to the #1 word for this round of The New Tourism Lexicon.

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## THE CANADIAN WORDS

### 1. PEOPLE

Human beings considered collectively; the men, women, and children of a nation, community, or ethnic group; a group of people inhabiting an area or place; the people within a destination.

**Associated industry value:** Passion, Collaboration and Inclusiveness.

**Possible uses:**

- If you build a place where *people* want to visit, you have built a place where *people* want to live. If you build a place where *people* want to live, then you have built a place where *people* want to work. If you build a place where *people* want to work than you have built a place where employers want to locate. It all starts with a visit.
- Destination organizations exist to help and support the *people* in our community.
- A destination brand is not a slogan or an ad campaign; it is the sum of a the history, character and culture of the *people* of a destination.

The next 29 words are as follows in the order that they ranked.

---

### 2. KNOW

To be aware of through observation, inquiry, or information; to have developed a relationship with a person or a people through meeting and spending time with them; to be familiar or friendly with.

**Associated industry value:** Awareness.

This is the first appearance of this word on

Destinations International's key word list and at first, we were not sure whether to include it. But the fact that it was not only the number one word on the search list, but number one by a clear margin made it hard not to place it on the list. That combined with the definition — to be aware — sealed the deal. “Know” is a word that ties back to one of the key values of our industry - awareness. And in this time of pandemic and civil and economic unrest, it goes to the core of what people are seeking — to know what the problem is and to know what solutions may exist.

**Possible uses:**

- A destination organization *knows* its community — better than any outside consultant can.
- We seek to *know* the answers to key questions, such as: do our residents feel safe enough to invite visitors? Do visitors feel safe to visit our destination?
- Need help exploring our destination? *We know* our way around. We have this knowledge because we are a local.

---

### 3. HEALTH

The state of being free from illness or injury; a person's mental or physical condition; state of a community's economic and societal position.

**Associated industry value:** Passion and Relevance.

**Possible uses:**

- The *health* of our community's economy depends on a strong travel economy.
- Residents and visitors alike are understanding the *health* needs to embrace face masks and social distancing in public spaces.
- The *health*, physical, socially and economically, of our residents is our number one priority!

---

### 4. NEW

Not existing before; made, introduced, or discovered recently or now for the first time; already existing but seen, experienced, or acquired recently or now for the first time; just beginning or beginning anew and regarded as better than what went before.

**Associated industry value:** Innovation, Sustainability.

**Possible uses:**

- Our destination offers *new* experiences for visitors which results in *new* opportunities for our residents.
- We welcome *new* ideas and fresh perspectives. We embrace and use *new* technologies and platforms to tell our story.
- We work with *new* technologies, but our approach is rooted in our true and tested values.

---

**5. NEED**

To require something because it is essential or very important; a thing that is wanted or required.

**Associated industry value:** Awareness, Sustainability.

**Possible uses:**

- Every community *needs* to compete with every other community for their share of the world's attention, customers, ideas and investment. This is the community *need* that a destination organization fills.
- A community *needs* destination promotion just as it *needs* education, health care, public safety and utilities.
- Our travel economy must be developed with the *needs* of the community in mind.

---

**6. TIME**

To plan, schedule, or arrange when something should happen or be done; measure the time taken by a process or activity; an instance of something happening or being done; an occasion or a moment.

**Associated industry value:** Innovation, Sustainability.

**Possible uses:**

- During this Great Interruption, it is important to take this *time* to plan for the Next Normal.
- Destination organization employees are professionals who take the *time* to learn

the industry, its trends and its habits, and identify what opportunities exist for our community.

- We understand that our history is a collection of *times* made up of individual moments that make us who we are.

---

**7. WORK/WORKER/WORKING**

An activity involving mental or physical effort done to achieve a purpose or result; a task or tasks to be undertaken; something a person or thing must do; a job.

**Associated industry value:** Awareness, Relevance, Sustainability

**Possible uses:**

- We put 1.8 million people to *work* in big and small communities across our country.
- Our industry puts to *work* people who have every range of education level.
- One out of every 11 people in Canada are *working* in jobs are directly or indirectly relying on the travel industry.
- We *work* to sustain our destination in a way that maintains our community and our assets, while growing opportunity.
- Tourism provides one of the most diversified *workforces* in the country. In addition to being the top employers of youth, tourism businesses also employ more women, indigenous peoples, new Canadians and seniors than most other business sectors.
- The recruitment and retention of Canadian workers first is and will always be a top priority.

---

**8. QUESTION**

A sentence worded or expressed to elicit information; feel or express doubt about; raise objections to; seek an answer or test an approach.

**Associated industry value:** Awareness, Innovation, Sustainability

**Possible uses:**

- The two *key questions* now are: do our residents feel safe enough to invite visitors, and do visitors feel safe enough to visit our destination?

- We are aware. We ask *questions*. We research. We engage. And most of all, we listen.
- We seek to be the best and periodically, *question* our plans and strategies to make sure they meet the needs of our destination.

---

## 9. BUSINESS

A person's regular occupation, profession, or trade; the practice of making one's living by engaging in commerce; an entity that creates jobs.

**Associated industry value:** Sustainability

**Possible uses:**

- The travel industry creates and supports more small *businesses* than any other major sector.
- Travel promotion is *business* development.
- We are in the *business* of community building.
- In addition to being the top employers of youth, tourism *businesses* also employ more women, indigenous peoples, new Canadians and seniors than most other *business* sectors.

---

## 10. CARE

The provision of what is necessary for the health, welfare, maintenance, and protection of someone or some place; serious attention applied to doing something correctly; look after and provide for the needs of.

**Associated industry value:** Awareness, Inclusivity, Sustainability.

**Possible uses:**

- We *care* about the people in our community. They are our number one priority.
- Destination promotion is done out of *care* for the health and welfare of our community.

---

## 11. WANT

A lack or deficiency of something; a desire for something; a community need.

**Associated industry value:** Awareness, Inclusiveness.

**Possible uses:**

- We *want* everyone in our community to feel welcome.
- We *want* our staff to feel appreciated and respected.
- Our community *wants* information, opportunity, and jobs.
- We appreciated and seek to address the needs and *wants* of all the communities in our destination.

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## 12. PUBLIC

A need or something concerning the people as a whole or done, perceived, or existing in open view.

**Associated industry value:** Collaboration, Inclusiveness, Transparency.

**Possible uses:**

- A destination organization is a *public* good that fills a *public* need.
- In the end, a destination organization serves the *public*. It is why they exist.
- We operate in the *public* for the *public*. We share our successes and victories; we also share when we have fallen short or failed.

---

## 13. COMMUNITY

A group of people living in the same place or having a characteristic in common; a feeling of fellowship with others, because of sharing common attitudes, interests, values, and goals; residents of a destination.

**Associated industry value:** Passion and Relevance.

**Possible uses:**

- Tourism builds *community*.
- Addressing the need for destination promotion is for the benefit and well-being of every person in a *community*.
- Destination promotion is an essential investment to develop opportunities and build quality of life to benefit all the residents of a *community*.

---

#### 14. SUPPORT

To bear all or part of the weight of; hold up, give assistance to; enable to function; material assistance.

**Associated industry value:** Collaboration, Relevance

**Possible uses:**

- You have a story to tell about how travel *supports* your community and the economy.
- Our community is *supported* by our programs achieving our mission.
- We *support* our stakeholders.
- Travel *supports* 1,875 indigenous tourism businesses.
- The travel sector *supports* 10.6% of the total Canadian workforce.

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#### 15. HOME

The place where one lives permanently, especially as a member of a family or household; a place where something flourishes, is most typically found, or from which it originates; the goal or end point.

**Associated industry value:** Passion, Sustainability

**Possible uses:**

- Our destination is our *home*.
- We understand that our destination is our *home* and therefore, we seek to maintain our community and our assets, and preserve our brand while growing opportunity.
- Our destination is our *home* and because of that, we seek to see it flourish.

---

#### 16. SERVICE

The action of helping or doing work for someone; a system supplying a public need such as transport, communications, utilities, or destination promotion.

**Associated industry value:** Awareness

**Possible uses:**

- Our success is our *service* to you and your experience in our destination.

- An experience in our destination means a level of *service* above and beyond.
- A destination organization does not operate to generate a profit; it operates as a *service* to the community.

---

#### 17. HELP

To make it easier for someone to do something by offering one's services or resources; the action of helping someone to do something; to aid.

**Associated industry value:** Awareness

**Possible uses:**

- We are here to *help*.
- Our mission is to *help* and advance our community.
- Our goal is to *help* our community create quality of place, which directly influences the quality of life.

---

#### 18. WAY

A method, style, or manner of doing something; a road, track, path, or street for traveling along; a specified direction of travel or movement; a distance traveled or to be traveled.

**Associated industry value:** Awareness, Sustainability

**Possible uses:**

- We need to find the *way* forward. Our community depends upon that.
- Our plan to help represents the *way* forward.
- Every community must compete with every other community for their share of the world's attention, customers, ideas and investment. The *way* to do that is to make people aware of a community, have a positive impression, and want to visit to experience the community and meet its people.

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#### 19. PLACE

A position or point in space; a building or area used for a specified purpose or activity; a home.

**Associated industry value:** Awareness, Passion



**Possible uses:**

- Our destination is not just a *place* on the map; it is a unique and thriving community.
- We do not just provide information about a *place*; we tell the story of a community and its people.
- We engage in *place* making as a means of economic development.
- Quality of *place* leads to quality of life.

**20. FAMILY**

A group of people related to one another by blood or marriage; all the descendants of a common ancestor; a group of related things.

**Associated industry value:** Awareness, Inclusiveness

**Possible uses:**

- A destination organization's mission is at its heart, to help our community — our neighbors, our friends, and our *families*.
- Our destination organization is staffed by professionals that live in our community. They do what they do not for some bottom line — they do it for their own *families* in addition to everyone else's.
- A destination is a collection of *families* that we take great care with.

**21. NEXT**

Coming immediately after the time of writing or speaking; coming immediately after the present one in order, rank, or space; the immediate future.

**Associated industry value:** Innovation

**Possible uses:**

- We need to prepare for the future, the *next* normal.
- For us, quality service will remain for your *next* visit.
- Destination organizations are always looking for the *next* practical action or strategies for sustainable success in a dramatically changing world.

**22. ABLE/ABILITY/AVAILABLE**

Having the power, skill, means, or opportunity to do something. Having considerable skill, proficiency, or intelligence. With these, being able to be used or obtained and being at our community's disposal.

**Associated industry value:** Awareness, Inclusive

**Possible uses:**

- We are *available* to offer our talents and knowledge to any civic endeavor.
- We have the *abilities* to help the meeting planner, event organizer, visitor, entrepreneur and site selector.
- We are *able* to promote our community to the world.
- Our greatest strengths are our local knowledge and customer *availability*.

**23. PLAN**

A detailed proposal for doing or achieving something; a detailed map or diagram; decide on and arrange in advance.

**Associated industry value:** Innovation, Collaboration, Sustainability, Passion.

**Possible uses:**

- We will continually evaluate our mission and priorities based upon on our strategic *planning*.
- We build *plans* and programs that maintain our community and our assets, and preserve our brand while growing opportunity.
- We have *plans* to move our community forward and through this time of crisis.

**24. ECONOMIC DEVELOPMENT/ECONOMY**

The creation of wealth from which community benefits are realized; an investment in growing the economy and enhancing the prosperity and quality of life for all a community's residents.

**Associated industry value:** Sustainability

**Possible uses:**

- Through destination stewardship and brand importance, destination organizations strengthen the

community's *economic development* abilities and its vitality, which provides opportunity for all the people in the destination.

- A destination organization is an *economic development* organization.
- Travel promotion is an instrument of both short- and long-term *economic development*.

---

## 25. PROGRAM

A set of related measures or activities with a long-term aim, an activity that solves a problem.

**Associated industry value:** Innovation, Relevance.

**Possible uses:**

- A destination organization is a community asset responsible for *programs* promoting a community as an attractive travel destination and enhancing its public image as a dynamic place to live and work.
- A destination organization creates promotional *programs* to share the brand of our destination.
- We develop *programs* that solve problems and fill needs.

---

## 26. JOB

A paid position of regular employment; a task or piece of work, especially one that is paid. Note that while “job” and “work” are related like squares and rectangles, they are not totally the same thing in this lexicon. Job tends to be structured and have a payment component. Work is the action that may or may not be paid.

**Associated industry value:** Relevance, Sustainability

**Possible uses:**

- Travel provides *jobs* for millions of Canadians, half of whom are under 35.
- Travel is a major source of *jobs* for our country's youth.
- We need to promote tourism career options through *job* training.

---

## 27. INFORMATION

Facts provided or learned about something or someone; what is conveyed or represented by an arrangement or sequence of things; an answer to a question.

**Associated industry value:** Collaboration, Transparency,

**Possible uses:**

- Currently, people need *information* on how to support our stakeholders and operate day to day in this current situation.
- We are the number one provider of *information* about every aspect of our destination.
- Our goal is to understand the needs and wants of our community and to provide *information* to address them.

---

## 28. TRAVEL

To make a journey, typically of some length or abroad, to a place or places; a business sector.

**Possible uses:**

- *Travel* and tourism is a dynamic, sustainable and vastly diverse industry, comprised of innovative businesses in every region of the country.
- Pre-clearance facilities are now available in more U.S. and Canadian airports and ports of entry than ever before — easing *travel* for thousands of people each year.
- We support adopting a “whole of government” approach to tourism that recognizes and prioritizes the *travel* sector as one of Canada's major economic drivers and job creators.

---

## 29. SAFE

To be protected from or not exposed to danger or risk; not likely to be harmed or lost.

**Associated industry value:** Awareness, Relevance

**Possible uses:**

- We want to be *safe* in our community.

- People need to know that it is *safe* to invest public money in our destination organization.
- We want to travel to a place that is *safe* for us to do so.
- The two key questions now are: do our residents feel *safe* enough to invite visitors, and do visitors feel *safe* enough to visit our destination?

---

### 30. FORWARD

To move onward so as to make progress; toward a successful conclusion; toward the future; ahead in time.

**Associated industry value:** Sustainability

**Possible uses:**

- We need to find the way *forward*. Our community depends upon that.
- From this day *forward*, our residents are our ultimate customer.
- As we move *forward*, we understand that this must be done in a way that maintains our community, our assets and preserves our brand while growing opportunity.

### OTHER WORDS OF VALUE

While these two lists of 30 words rise to the top of our list, other words that have value for these times include risk, life, change, protect, open, provide, essential, everyone, meeting, fund/funding, local, open, opportunity, project, provide, resident, neighbor and investment. Finding ways to use them with the 30 words above can magnify the impact in connecting with people.



# **ADVOCACY CASE STUDIES**



**In March 2020, the travel industry was hit by a crisis the likes of which we have never seen before. The COVID-19 pandemic turned our industry upside-down, forcing destination professionals to adapt in unprecedented ways.**

During this time of global crisis and uncertainty, we put the call out to industry thought leaders to sit down and tell us, in their own words, what is going on and what is going to happen next in this vital global industry.

These interviews were featured on season one of the Future of Tourism podcast, hosted by tourism change agent David Peacock. During these conversations, several recurring themes began to emerge, forming a roadmap for recovery and the future of tourism.

## emerging trends in **GLOBAL TOURISM**

Presented by Simpleview and the Future Tourism Group

### **STAKEHOLDER ENGAGEMENT**

The best destinations are the product of highly engaged communities that take an active role in shaping their collective future. That's why, now more than ever, there is a need for substantive, tangible and productive stakeholder engagement and strong partnerships that will improve our destinations for residents and visitors alike.



**Some cities have really been building that network and expanding beyond tourism into the local creative economy and knowledge economy. We are finding that with COVID-19, the cities that have worked to establish those networks and have been more intentional stewards of their communities, are in a much better position now to be effective in their destination."**



– GREG OATES, SVP of Innovation at MMGY NextFactor



## COMMUNITY-SHARED VALUES & DESTINATION ALIGNMENT

This year at the Destinations International Annual Convention 2020, Jack Johnson, Chief Advocacy Officer at DI, really threw down the gauntlet in a big and unambiguous way; his challenge to us all, change as destination organizations, change significantly, change quickly or face irrelevance.



What it comes down to is this, is the visitor-economy really serving the community? Is tourism as we know it actually driving the benefit to the whole and not just a few? And how can we create a framework so that our industry is welcomed as part of the contributing fabric of society year round?"



– PAUL NURSEY, CEO of Destination Greater Victoria



## DMO ADVOCACY

In a way, COVID-19 has given us the opportunity to reset our destinations at a local level. Of course, there has always been an ongoing need for DMOs to advocate on their own behalf and that of their citizens; however, that need has reached a new critical level over the past several months.



One of the interesting things that is coming out of COVID-19 is more and more discussion around the social license that tourism needs to have [in terms of] creating balance with its residents. This is a time for all of us to take stock and to really rebalance the needs of our visitors, of our businesses and of our residents, and really contemplate what are the most important things we do as entities. Really, it's about delivering benefits to locals."



– MARSHA WALDEN, President and CEO of Destination British Columbia

## DIGITAL DISRUPTION

The past few months have accelerated one aspect of our industry that previously may have taken a backseat: the pressing need to properly harness digital mediums and meet the consumer where they really shop — online.



Now more than ever, we expect everything — every service or product, every experience, every outing and every kind of entertainment — to start with a digital experience."



– DAN HOLOWACK, CEO of Crowdriif



### DESTINATION DEVELOPMENT

COVID-19 has also highlighted the imperative need for continual, partner-driven destination development; the best destinations work in partnership with a multiplicity of stakeholders to create destinations that are animated and alive. While destination organizations can — and should — play a pivotal and catalytic role in destination development, they can do so without being the sole source of capital funding.

“ I learned from the best like Steve Jobs. He said that marketing is actually about creating value for the customer. And if you think about it, the duty of an organization is actually to make sure that you create value for your customer.”



– ELKE DENS, Marketing Director at Visit Flanders

### SOCIAL RESPONSIBILITY

And finally, David found it important to add a sixth most pressing need to the reinvention of the tourism industry: the need for destinations and communities to create safe and inviting spaces for every visitor.

On season two of the Future of Tourism podcast (available on Youtube, Spotify and Apple Podcasts), we'll focus on applied thinking, and start talking about the tools we can harness to recraft our organizations and our destinations in the wake of COVID-19.

“ During this crisis, the spectre of racial inequity and systemic racism has once again come to a head. I don't need to lecture you — just open a newspaper, turn on the television or read your newsfeed. We must consciously as both individuals and as a society embrace this painful truth and deal with it together. It is long past due.”



– DAVID PEACOCK, Senior Advisor, Future Tourism Group

futuretourismgroup | simpleview

For more information, visit [simpleviewinc.com/future-tourism-group](https://simpleviewinc.com/future-tourism-group)



## YOUR TURN



Which of these trends are impacting your organization?



Have you already embraced working on those trends?



Which trends do you want to add to that list and focus on for the coming year?



What are some of the first steps you can take to address these trends?



Are there any trends that weren't identified here that you would add to this list?

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# CALLING ALL TRAVEL EXPERTS:

TELL THE WORLD YOUR DESTINATION'S UNTOLD STORY & REENERGIZE YOUR MARKETING EFFORTS (FOR FREE)





# DEVOTED TO INSPIRING TRAVEL



## Who We Are

We are a community of passionate travel experts ready to help you plan your next adventure. Whether you're looking to rediscover what makes your hometown special or explore a new community, destination organizations are here to help you find the people, places, and experiences that make a place special.



## Our Mission

We are devoted to inspiring travel. To help you discover new experiences in your home city, and to explore new horizons. Come with us on an adventure that will reconnect you with what matters most.

It's no secret that the coronavirus pandemic has had a particularly brutal impact on the travel industry. It has been truly heartbreaking to see the toll 2020 has taken on our colleagues and friends.

One of the best-kept secrets of travel is the destination organization, a collaboration of wonderful people whose sole job is celebrating their community and helping people find the incredible things that make a city, town, or region unique. These experts aren't trying to sell you something, they don't have ulterior motives—these hospitable professionals simply want to make sure visitors have amazing memories of the time spent in their hometown.

To help visitors rediscover their own community and to celebrate the amazing people who dedicate their lives to serving their destination, Tempest launched Rediscover America & Rediscover Canada, a collaborative

movement to tell travel's untold stories, showcase unique community experiences, educate visitors about the mission of destination organizations and reenergize the travel industry as we begin to emerge from quarantine and reconnect.

We are so incredibly proud of our team for throwing all their passion for the travel into this amazing collaboration. It has been emotional and fulfilling to see this movement take shape, and we are so excited to be able to share it with you and get you involved.

Now let us show you what we've been up to so far, and how we can help you showcase your destination to a new audience.

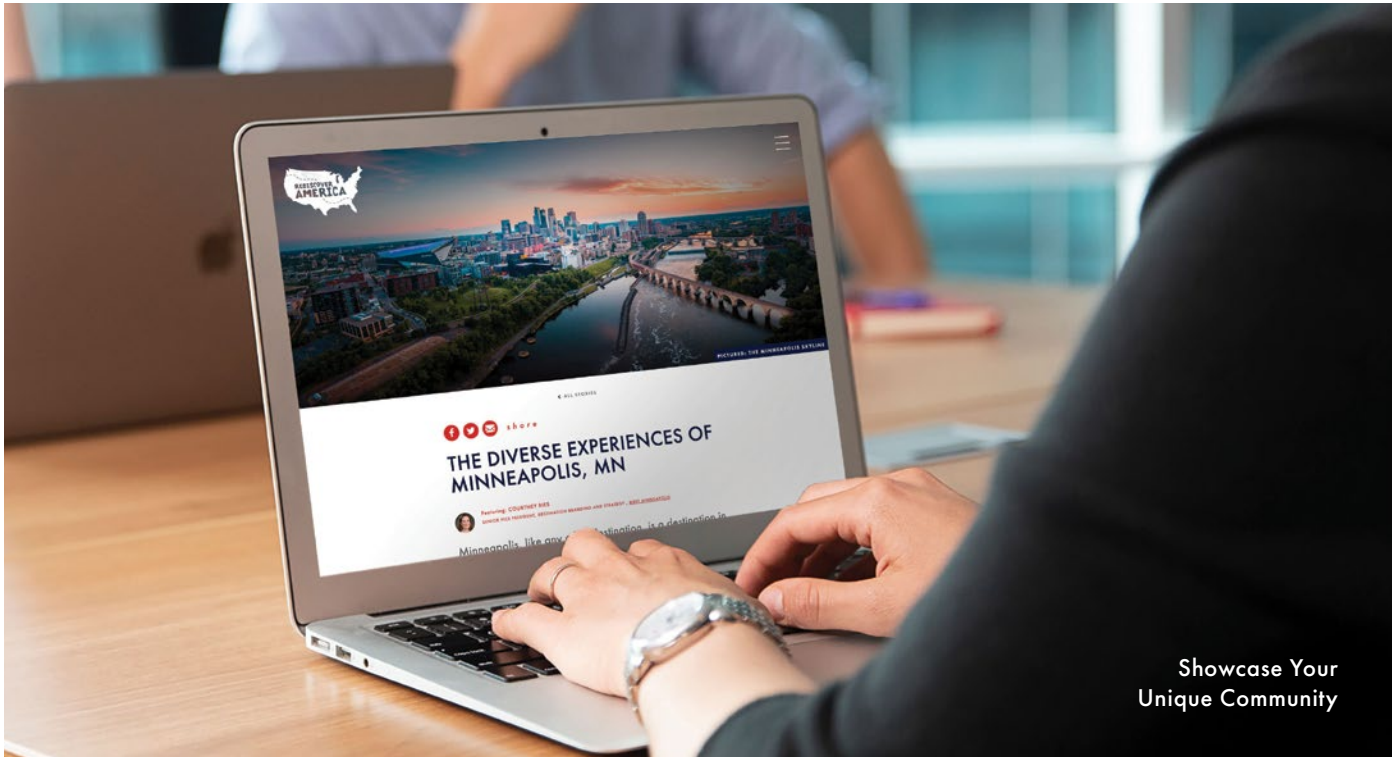


**The Editors of Rediscover America  
& Rediscover Canada**

REDISCOVER AMERICA | REDISCOVER CANADA







## OVERVIEW

Rediscover America & Rediscover Canada are movements designed to highlight the buried treasure of a community, and celebrate the personalities of the destination industry.

We are compiling deep, evergreen content to inspire travel and help raise the profile of destination experts to the general public.

By showcasing the things that make communities unique through destination organizations, we will inspire travelers to explore while also introducing them to the destination experts that can help make their trips unforgettable experiences.



**“We have five rivers that flow into the Saginaw Bay. That water is life, and Michigan is water. Our water is what brings us together.”**

**ANNETTE RUMMEL**  
GREAT LAKES BAY, MICHIGAN

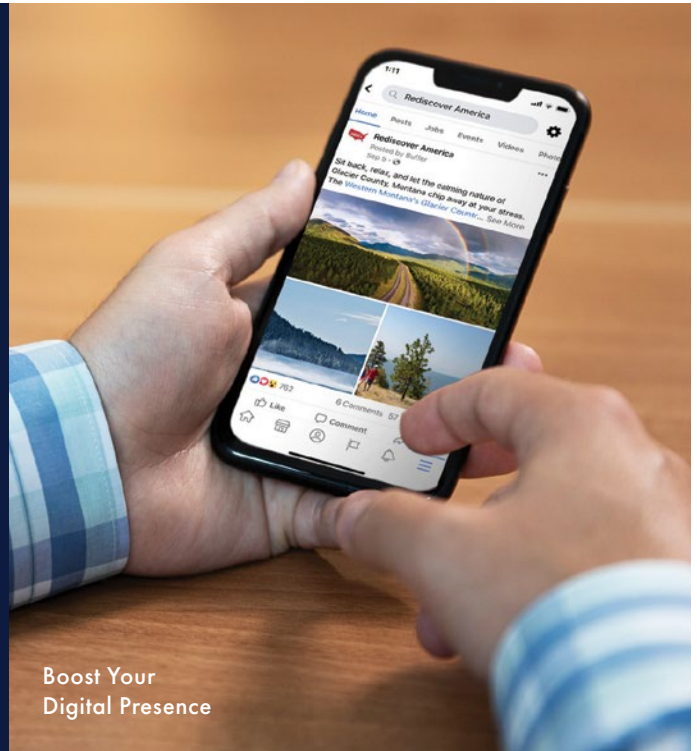
REDISCOVER AMERICA | REDISCOVER CANADA





**"Where I live, I'm a five-minute bicycle ride from being on a gravel road surrounded by farmland. We've got the downtown, with urban bars and restaurants, but it's also very close to trail riding, hiking, and canoeing experiences."**

**MINTO SCHNEIDER WATERLOO, ONTARIO**



**Boost Your Digital Presence**

## JOIN GOOD COMPANY



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DIRECTOR Arizona Office of Tourism



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MEDIA & LEISURE MANAGER Tourisme Montréal



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**JASON FULVI**  
PRESIDENT & CEO Visit KC



**KATIE MITURA**  
VP OF MARKETING & COMMUNICATIONS  
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**A Complimentary Opportunity for Destination Organizations.**

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# DESTINATION NEXT

Futures Study 2019

A Strategic Road Map for the Next Generation  
of Global Destination Organizations



FUNDED BY



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Ana María Viscasillas – Business Tourism Services

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Jordan Young – InterVISTAS Consulting Inc.

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## Dear Reader,

We are pleased to present our 2019 DestinationNEXT Futures Study — a strategic road map for the next generation of global destination organizations.

The technological advancements within our industry are rapidly increasing the pace of change and creating new opportunities. Destination leaders must continuously look to the future to remain relevant, and this study will support your organization in that effort.

During Destinations International's 100th anniversary in 2014, the Destinations International Foundation released its first DestinationNEXT Futures Study, the most comprehensive and insightful report of its type in the foundation's history. Since that release, we updated the report in 2017 and now again in 2019 to shape the strategic plans of our members around the world. Each report has provided a clear plan for where destinations are going and the strategies they are employing.

The 2019 Futures Study focuses on three transformational opportunities — destination stewardship, community alignment and digital conversion — to help destination leaders formulate strategic decisions for the future. We believe that destination leaders need to leverage all three of these opportunities collectively to effectively lead their organizations.

We invite you to read through the report with your team and use the findings to guide your destination organization toward a successful future.

Sincerely,



**Don Welsh**  
President and CEO,  
Destinations International



**Jack Johnson**  
Chief Advocacy Officer,  
Destinations International  
Executive Director,  
Destinations International  
Foundation



August 2019

**Dear Reader,**

It is our pleasure to present the DestinationNEXT 2019 Futures Study. Our industry has enjoyed years of growth and development, but today we face emerging economic, political, social and environmental pressures that are forcing us to adapt to new realities.

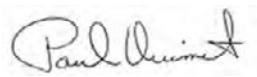
The DestinationNEXT 2019 Futures Study is a deep dive into the major opportunities for destination marketing and management leaders in these dramatically changing times. It is an ambitious global project intended to provide a roadmap for destination organizations heading into the future.

We surveyed more than 500 industry and community leaders in over 50 countries. This was the most extensive survey ever completed in our industry. The takeaways provide strategic direction for any size organization moving forward.

Supplementing that, the DestinationNEXT Scenario Model and Assessment Tool helps stakeholders strategically evaluate their destinations. MMGY NextFactor has now led more than 200 detailed assessments of destinations around the world. This has provided many additional insights into the opportunities and challenges present in both the leisure and business event markets.

We would like to acknowledge the important contributions of the Destinations International Foundation, whose funding has made DestinationNEXT possible. We also want to express our gratitude to our Advisory Council. Their advice and support have been invaluable.

**Yours truly,**

A handwritten signature in black ink that reads 'Paul Ouimet'.

**Paul Ouimet**

Partner, President,  
MMGY NextFactor

Managing Director,  
DestinationNEXT,  
Destinations International

A handwritten signature in black ink that reads 'Greg Oates'.

**Greg Oates**

SVP Innovation,  
MMGY NextFactor



This study references Appendixes that are not included in this workbook. For the full 2019 DestinationNext Futures Study visit: [destinationsinternational.org/reports/destinationnext-futures-study](https://destinationsinternational.org/reports/destinationnext-futures-study)

# Executive Summary

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## DestinationNEXT 2019 Futures Study

**Destination organizations today are collaborating more closely with their local communities to define a shared vision for the future that provides long-term benefits for both key stakeholders and residents.**

**There is also a much greater emphasis on community-driven destination development that aligns around the three integrated pillars of economic, social and environmental sustainability to drive competitive advantage in today's global visitor economy.**

**Lastly, the increasingly sophisticated digitization across the industry is connecting destination partners and individual consumers more directly than ever before.**

Those are the primary themes in the DestinationNEXT 2019 Futures Study, produced by MMGY NextFactor on behalf of Destinations International.

The 2019 Futures Study is based on a global survey that asked destination leaders worldwide to rank a predetermined series of visitor industry trends in terms of their relevance for their specific region. Participants were also asked to rank a number of strategies by importance that destination organizations are using to accelerate or manage visitor growth, based on those trends.

For 2019, more than 500 destinations in over 50 countries contributed to this year's rankings of 52 trends and 64 strategies.

The survey data was then used to develop the following three transformational opportunities to help destination leaders formulate strategic decisions heading into the future. Together, they provide an integrated framework designed to both grow the visitor economy and support the mandates of local government, industry and community organizations.

### 1. Destination Stewardship

Balancing economic development, sustainable tourism and quality of life.

### 2. Community Alignment

Building public support around a shared vision for the destination.

### 3. Digital Conversion

Connecting with visitors on mobile devices to drive real-time sales in-destination.

# Scenario Model

The DestinationNEXT 2019 framework also includes a Scenario Model that assesses the levels of destination strength and community alignment in relation to the visitor economy, based on 10 weighted variables for each.

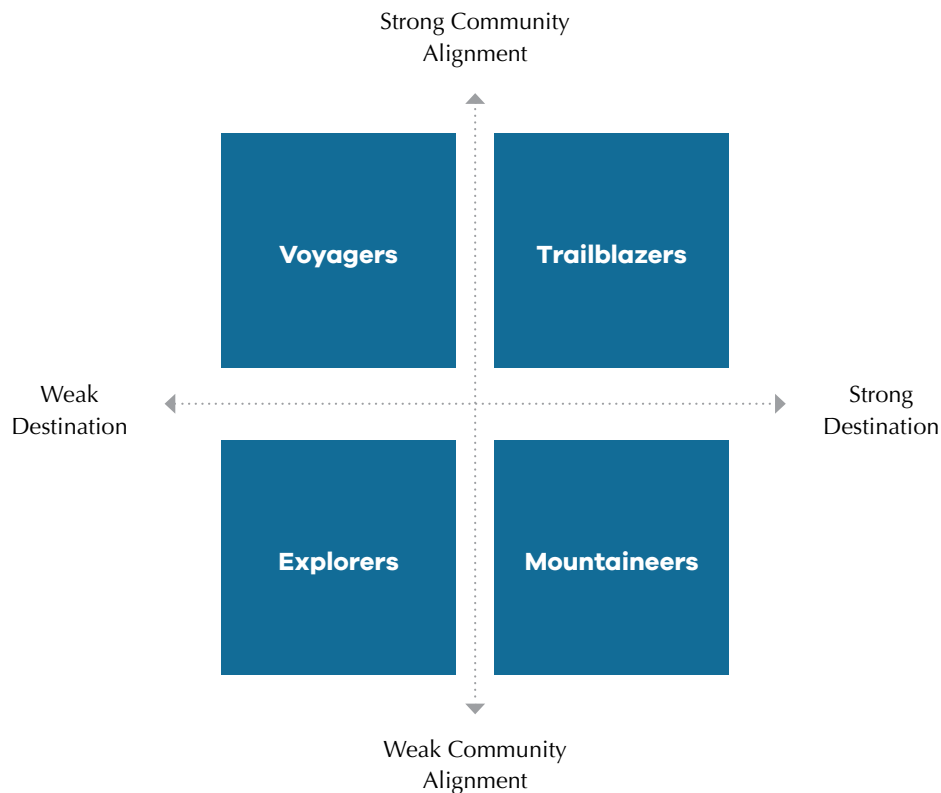
The survey data from the assessments is used to plot the destination in one of the four quadrants making up the Scenario Model. Each of those four scenarios have specific strategies that destination organizations should employ to address challenges and opportunities.

The present DestinationNEXT 2019 Scenario Model remains mostly unchanged from previous years. That illustrates its effectiveness as a platform for bringing together government leaders, civic organizations and other key stakeholders to co-create a strategic road map for the future of their destinations.

Since 2015, more than 200 destinations worldwide have completed the assessment.

Based on that success and growing demand, MMGY NextFactor has developed, and will soon be releasing, three new dedicated DestinationNEXT assessment models with revised surveys created specifically for global cities, luxury destinations, and small cities.

In just five years since the launch of DestinationNEXT, the global visitor economy has evolved in ways we never could have imagined. The insight here will help all destination organizations navigate the future more strategically based on the empirical data provided throughout.



# Introduction

---

## A Changing World

**From an industry perspective, much of the available insight informing the future direction of destination marketing and management is highly fragmented.**

**To help address that, the DestinationNEXT 2019 Futures Study is a comprehensive and integrated framework of data-driven intelligence for destination organizations of all sizes, models and budgets.**

**The Futures Study is designed to support strategic decision-making that aligns with any individual organization's mandates in almost any region of the world.**

Those mandates are wide ranging. For some destinations, the priority is driving visitor volume and spend above all else. For them, room nights, average daily rate, per person spend, and citywide event attendance metrics are the key measurements of success, and everything else is a distant second.

Many other destination leaders, meanwhile, are expanding the definition of why they do what they do. They measure visitor volume, naturally, but there's increasing focus on qualitative performance indicators that speak to their organization's relationship with local residents and community organizations.

These destination leaders are prioritizing greater collaboration and alignment with local government, key industry stakeholders, civic leaders, and the

non-industry community at large (referred to as "community" moving forward). They're investing time and resources in community-driven destination development and expanding their networks among a wider breadth of local organizations outside the hospitality and tourism industry.

This serves many purposes. It accelerates equitable economic development, and it provides more opportunities for more people in more neighborhoods. It also helps validate public funding, improve resident sentiment, build stronger communities, inspire the next generation of young leaders, protect local resources, support workforce attraction and development, and elevate the destination brand, among many other things.

The shift from destination marketing to management is not a new conversation. The DestinationNEXT 2019 Futures Study, however, illustrates just how significantly that trajectory is scaling today, and how organizations worldwide are adapting. The number of new trends and strategies this year, and how others from previous years have moved up the rankings, validates how many industry leaders are now much more intentional about destination management.

The most progressive organizations today are positioning themselves as a shared community value, with an integral role in uplifting a greater scope of different audiences — both local and global. There's also a much more focused sense of purpose around



integrated sustainability, where more destination organizations are addressing, collectively, the long-term economic, social and environmental impacts of their decisions in collaboration with their local community and key stakeholders.

This greater emphasis on destination management and community building is still very much aligned with the traditional mandates for destination organizations, in terms of driving higher visitor spend and new business development in the region.

“Our Sustainable Moments initiative has created an entirely new audience for both consumer and business events,” explains Tammy Blount-Canavan, President & CEO of the Monterey County Convention & Visitors Bureau. “The time spent on stewardship and engagement initiatives aren’t just feel-goods. There’s

a compelling business case because we can improve the visitor experience with stronger community buy-in. Yes, we have a heads-in-beds mandate, but that doesn’t mean we’re not creative in how we pursue it. And isn’t that our purpose, to create a better quality of life as a result of our contributions?”

That was a consistent theme that destination leaders shared during the development of the DestinationNEXT 2019 Futures Study. There is still much work to be done to clarify and codify how destination leaders can embrace this vision, but clearly, the industry is coming together around a new shared vision and mission for the future.



# Work Plan

## Phase 1: 4 Advisory Panels

The DestinationNEXT 2019 Futures Study includes a ranking of 52 marketplace and industry trends driving shifts in the global visitor economy. There are also 64 strategies that destination organizations are employing today based on those trends.

Work began in January 2019 to update the Futures Study. To start, MMGY NextFactor consulted with four expert advisory panels to identify new and ongoing shifts in the global visitor economy. The panels included:

### 1. Industry Disruptors

Leaders in the sharing economy, social and digital media, data and mobile technology

### 2. Industry Clients

Tour operators, meeting planners and event organizers

### 3. Community Leaders

Municipal and state governments, foundations and nonprofits, and civic and cultural organizations

### 4. Destination Leaders

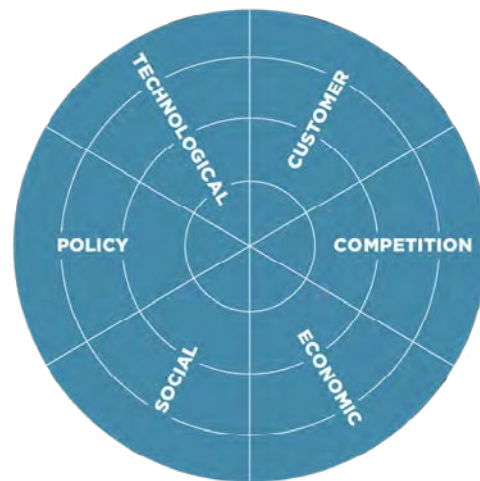
Top advisors and consultants in our industry

Together, the MMGY NextFactor team and the advisory panels defined the top 52 trends and 64 strategies. See Appendix A and B for a full list of each. Some of the trends and strategies are new for DestinationNEXT 2019, while others were rolled over from 2017 because they're still evolving and impacting the industry in new ways today.

## Phase 2: Strategic Radar Map

The top trends were categorized in a strategic radar map, utilized in previous Future Studies, segmented by trends relating to: Customer, Competition, Economic, Social, Policy and Technological themes

The lowest-ranked trends from DestinationNEXT 2017 were eliminated from the list, leaving a total of 52 trends to be considered for 2019. The lowest-ranked strategies from 2017 were also eliminated, leaving a total number of 64 strategies for 2019.



52 Trends

64 Strategies

## Phase 3: Global Survey

The 52 trends and 64 strategies were used to develop the DestinationNEXT 2019 Futures Study survey, which asked respondents to rank the trends and strategies in order of relevance and importance. There were also a number of additional general questions, which are included in Appendix D.

The survey was distributed to Destinations International members and several other industry mailing lists, including: UNWTO, ECM, AACB, PCMA, IMEX and U.S. Travel, among others.

A total of 521 destination and industry leaders in 55 countries participated in the survey. The results of the 2019 rankings were then compared against DestinationNEXT 2017 data to determine the major shifts driving the future of the global visitor economy.

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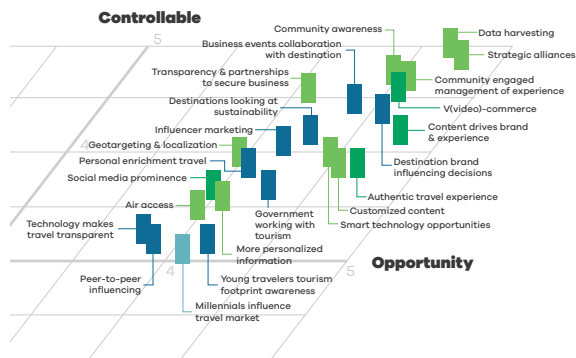
**521 Participants**  
**55 Countries**

## Phase 4: Future Map and 3 Transformational Opportunities

MMGY NextFactor completed a cluster analysis of the survey results to develop a new Future Map for DestinationNEXT 2019.

The purpose of the Future Map is to categorize the industry and marketplace trends in terms of how destination leaders can control, leverage, monitor or mitigate them.

The Future Map informed the development of the three new transformational opportunities for destination leaders today, based on the specific marketplace and industry trends that organizations can exploit most effectively.



# Advisory Panel Takeaways

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## Leaders and Disruptors

Here are the primary takeaways and top-line insights culled from the four advisory panels. These were crucial for determining the lists of industry trends and destination organization strategies that populated the DestinationNEXT 2019 survey.

Panel members provided much more contextual intelligence around the trends and strategies defining the future of the visitor economy, which has been integrated throughout this document.

“Greater focus on integrating economic, social and environmental sustainability will become imperative.”

## Industry Disruptors Panel

**Destination organizations are uniquely positioned to capture and synthesize key data for organizations outside the visitor economy.**

Developing destination data management and analytical capabilities creates high-value collaboration opportunities with other destination stakeholders in government, economic development, academic institutions, etc.

**Continued strong travel demand, especially from growing middle classes in Asia, India and MENA, will force more intentional destination stewardship.** Emerging source markets will challenge global iconic destinations (e.g. New York, Venice, Paris) to balance growth, quality of life and community support.

**Greater focus on integrating economic, social and environmental sustainability will become imperative.** Both established and emerging destinations can drive competitive advantage by developing strategies that align collectively with the long-term viability of profit, people and planet.

**Tourism and destination organization leaders will need to take steps to attract and retain talent with the appropriate analytical and developmental skill sets.** This will mean competing more aggressively for skilled talent with established, higher paying industries.

**The technological and sociological evolution outside the tourism industry is faster and more pervasive than within the tourism industry.** This is prompting the need for tourism enterprises of all sizes to consider new forms of business relationships (e.g. joint ventures, partnerships, etc.) with non-traditional entities in order to meet visitor and stakeholder expectations.

**Growing use of augmented and virtual reality in content delivery, and more use of artificial intelligence to customize content.** The whole issue of generational expectations around engagement and education delivery will have an impact on both leisure and business event markets.



## Industry Clients Panel

**Safety, security, climate change, and political/ economic realities are now top considerations for choosing destinations, especially for meetings.**

The industry is lacking risk management protocols to help stakeholders mitigate threats.

**Meeting and event planners are seeing the impact of consolidation within the industry.** Hotel consolidation is leading to concerns about competition, pricing and negotiations.

**Planners are demanding a different valuation of their business than “heads in contracted beds,” given shifts in the business and room-sharing.** The industry is long overdue in developing a new shared vision of success for the future.

**It is harder to differentiate what really makes a destination and its local experiences “unique.”** There needs to be greater emphasis on community-driven destination and product development.

**Sustainability in the industry is increasingly top of mind, especially for younger generations.** The industry can do much better in terms of managing overall impacts globally and locally.

**The balance between business event sales and services is out of whack.** The destination organization sales model is still too traditional, based on dates, rates and space. There is increased discussion about event outcomes, intellectual capital and knowledge clusters, but too few cities are delivering on that.

## Community Leaders Panel

**Destination management is becoming a key role for destination leaders.** Destination organizations are taking on more responsibility to lead and facilitate future-oriented planning with stakeholders in their communities.

**Visitor dispersal is a key strategy to manage high compression levels.** Developing experiences in places beyond the main draws for a destination are helping to alleviate impacts.

**Social impacts of tourism and business events are becoming more important.** Destinations need to better understand and plan for the societal effects their industry is having in their communities.

**Although common trends are impacting destinations around the world, many differences exist on the key issues from region to region.** Flexible and tailor-made destination strategies at a local level are key to success.

**The rise of emerging destinations will continue to accelerate.** Developing destinations and some completely new destinations are eagerly being sought after by leisure visitors and business event groups.

**Risk and crisis management is becoming the norm for destinations around the world.** Matters of safety and security, climate change and international public health are driving destinations and destination organizations to ensure they have mitigation strategies in place.





**“The rise of emerging destinations will continue to accelerate.”**

## Destination Leaders Panel

**More destination organizations are embracing their evolving role in sustainable destination management and equitable economic development.** Destination organizations are defining their missions as community leaders, stewarding the convergence of tourism, community, urban and economic development for the benefit of residents.

**Community advocacy and alignment are much more critical priorities today for destination organizations.** Destination leaders today are increasingly building coalition among the public and private sectors around a shared vision for the future of the destination, which prioritizes inclusivity, diversity, advanced mobility and connectivity, workforce development and higher quality of life.

**Destinations must bring new room-sharing platforms, mobility options and other emerging technologies into the fold.** Many public and private sector leaders are perceived as being afraid of real innovation and taking any level of substantive risk to try new things.

**Destination organizations are increasingly positioning their cities as a place to learn, grow and be inspired, both in the leisure and meetings markets.** The greater value proposition of a destination lies within the community's unique lifestyle and cultural DNA, above and beyond the attributes of the destination itself.

**Advancements in artificial intelligence and live inventory platforms are delivering consumers more personalized travel experiences and driving higher conversion.** The rise of on-demand, in-destination mobile booking options with platforms ranging from TripAdvisor to Airbnb are providing more business opportunities for independent tour and activity providers.

**City, regional and national budgets are declining, and governments are attacking tourism funding more than ever before.** Destination organizations are increasingly having to explore alternative funding due to increasing pressures from many different entities. They're also collaborating much more with local organizations to address an expanding scope of social issues in their communities.

# Survey Profile

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## Survey Profile

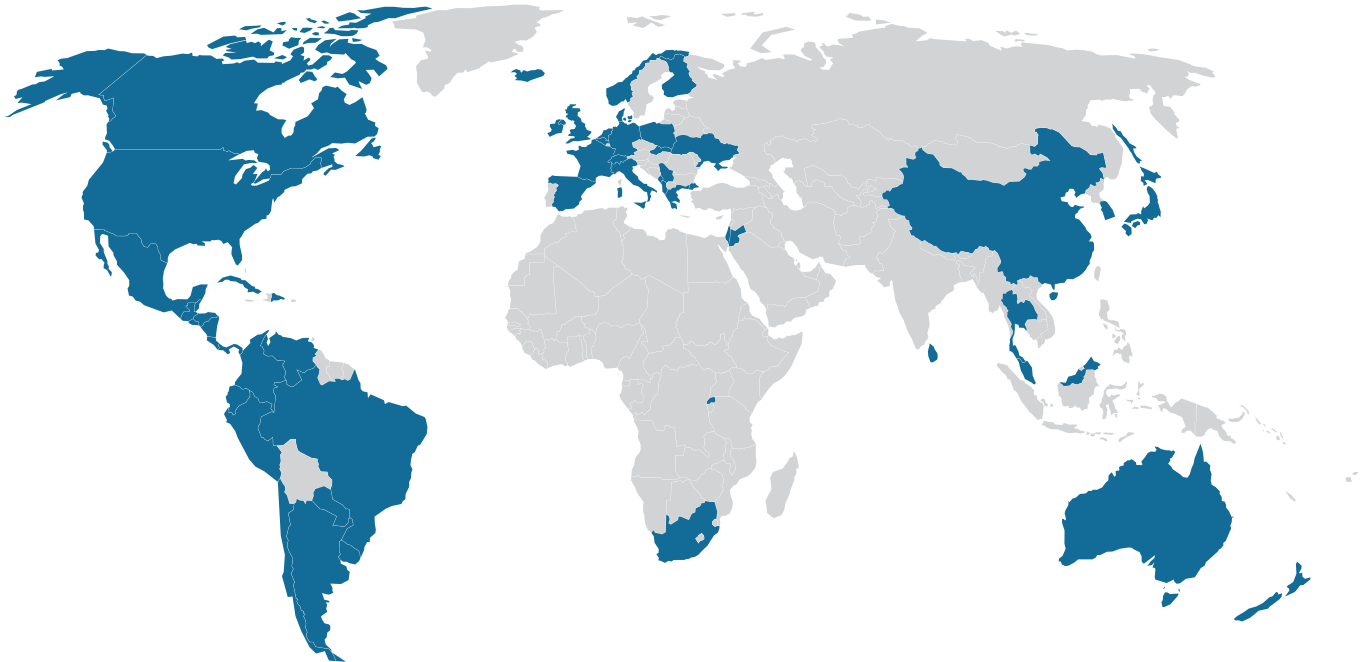
**An extensive global survey was sent to industry leaders in May 2019. It covered four areas:**

- 1. Business and governance profile of the destination organization**
- 2. Key trends impacting the industry and global visitor economy**
- 3. Destination organization strategies in response to key trends**
- 4. Future-proofing the destination organization to adapt to global socio-economic and environmental shifts**

The response was strong, with 521 industry leaders in 55 countries participating in the survey. The survey cast a wide net in terms of international coverage as well as the size, mandate and business model of organizations. A complete list of survey participants is included in Appendix G.

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## Survey Responses

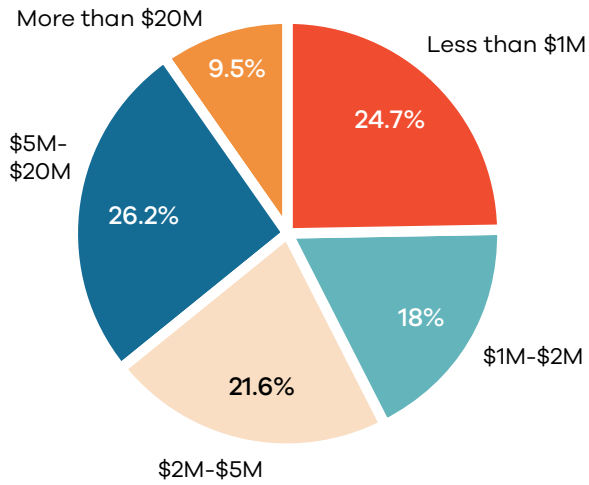


Albania	Cuba	Guatemala	Mexico	Poland	Ukraine
Argentina	Denmark	Honduras	Monaco	Rwanda	United Kingdom
Australia	Dominican Rep.	Iceland	Montenegro	Serbia	United States
Belgium	Ecuador	Ireland	Netherlands	Slovakia	Uruguay
Brazil	El Salvador	Israel	New Zealand	South Africa	Venezuela
Canada	Estonia	Italy	Nicaragua	South Korea	
Chile	Finland	Japan	Norway	Spain	
China	France	Jordan	Panama	Sri Lanka	
Colombia	Germany	Macau	Paraguay	Switzerland	
Costa Rica	Greece	Malaysia	Peru	Thailand	

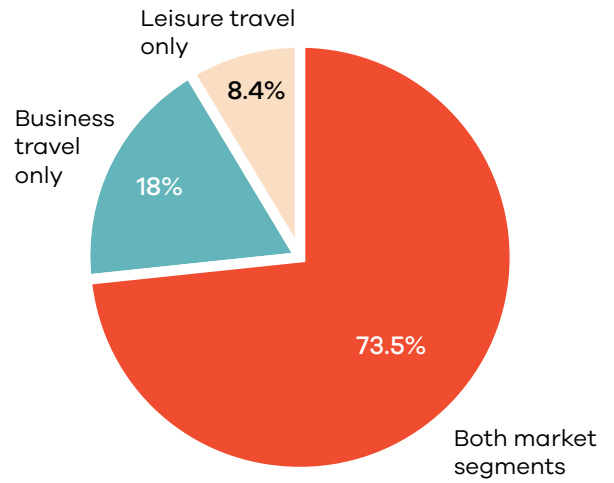
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**521** Participants  
**55** Countries

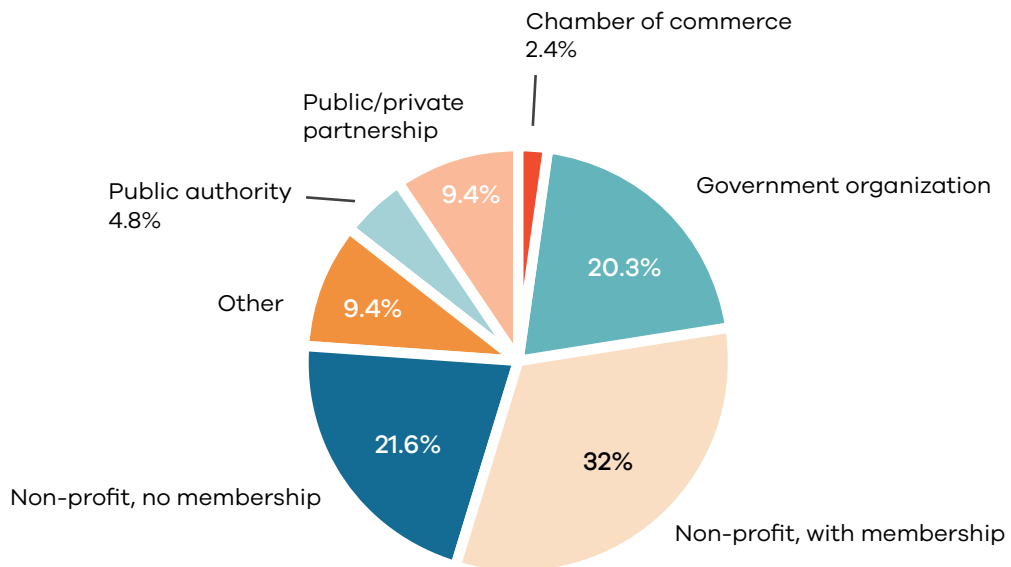
## Organization's Budget



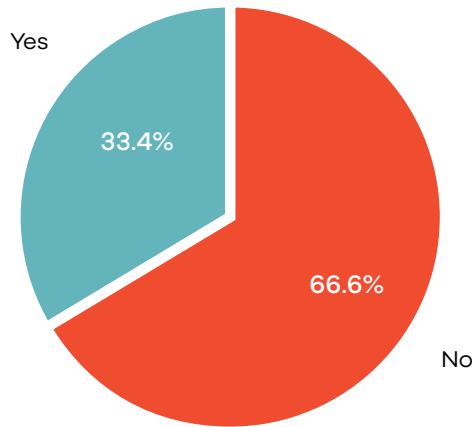
## Market Responsibility



## Business Model

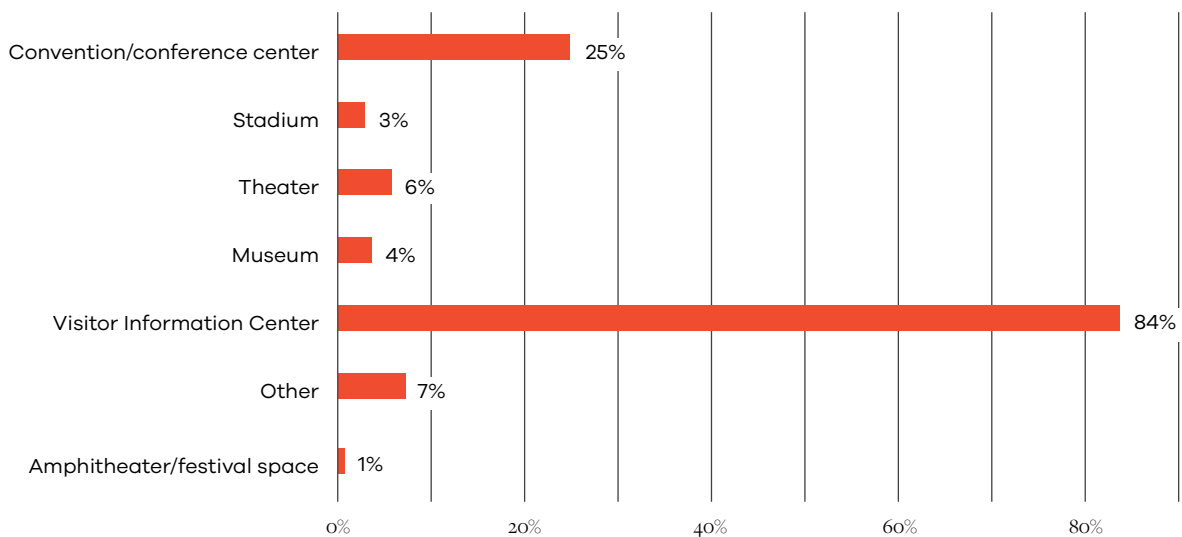


## Organization Manages or Operates Community-Based Venue(s)



## Type of Community-Based Venues

(Based on those that answered "Yes." Does not add up to 100% due to multiple answers.)





# Top 25 Trends

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## 2019 Trends

These are the top 25 out of 52 ranked industry and consumer trends. The change in ranking from DestinationNEXT 2017, or if the ranking is new this year, is indicated for each. The complete list of trends is included in Appendix A.

## Trend Rankings

## Change

1. Customers increasingly seeking a unique, authentic travel experience.	▲2
2. Content creation and dissemination by the public across all platforms drives the destination brand and experience.	0
3. Social media's increasing prominence in reaching the travel market.	▼2
4. Video becomes the new currency of destination marketing and storytelling.	▲2
5. Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations.	▲2
6. Mobile devices and apps becoming the primary engagement platform for travelers.	▼1
7. Travelers demanding more information, control, interaction and personalized information.	▲10
8. Customers increasingly expect highly curated and customized destination content.	▲5
9. Smart technology creating new opportunities for innovative new services and processes.	▼1
10. Geotargeting and localization becoming more prevalent.	0
11. Communities more engaged in the development and management of the destination experience.	▲13
12. Increasing importance of transparency and building partnerships to secure business to a destination.	▲39
13. Organizations are increasingly developing strategic alliances across multiple economic sectors in order to leverage resources.	▼2
14. More communities and municipal governments are aware of importance of tourism to local economy and job growth.	New
15. Air access to a destination is a key factor in attracting business.	▲1
16. Travelers are seeking more personal enrichment, including wellness and wellbeing.	New
17. Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts.	New
18. More third-party information providers aggregating content about destinations.	▲23
19. Peer-to-peer buyer influence driving customer purchases.	▲10
20. The brand of a destination becoming a more important factor for destination decisions.	▼6
21. Governments dealing with tourism from an integrated, multi-departmental perspective that is focused on economic development.	▲7
22. Technology makes travel products and services more transparent to the customer.	▲1
23. More information clutter and noise about destinations occurring in the marketplace.	▲31
24. Young travelers are more aware of their impact on the communities and environment they visit.	New
25. Influencer marketing is becoming an increasingly essential component of the destination marketing mix.	New

# Future Map

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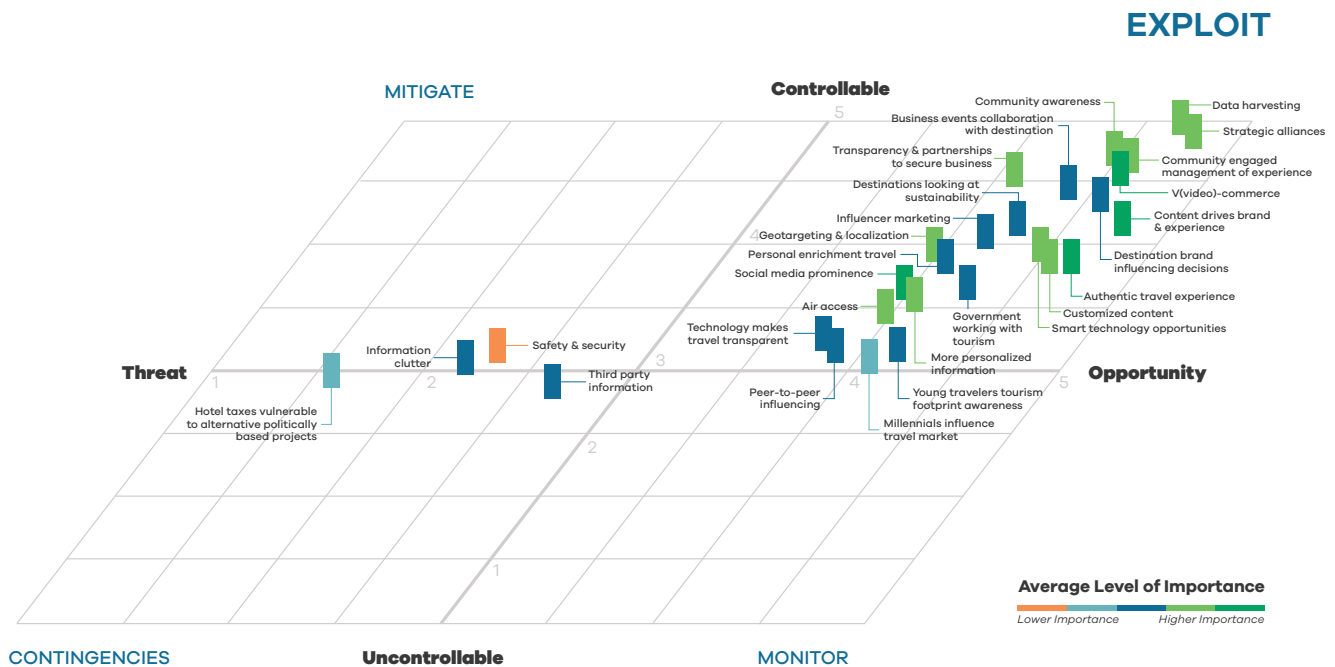
## 2019 Opportunities

The top 20 aggregate trends, plus a selection of other top trends from leisure-only and business event-only destinations, were plotted on a Future Map that assessed each trend based on:

- Degree to which the trend is an opportunity or threat to the destination
- Degree of control that a destination organization has to influence or capitalize on this trend

Rather than a conventional SWOT analysis, a Future Map helps destination organizations focus on the trends that they can impact or affect. The analysis identified a significant variety of opportunities to exploit, as illustrated in the upper right quadrant of the grid.

“A Future Map helps destination organizations focus on the trends that they can impact or affect. The analysis identified a significant variety of opportunities to exploit.”



# Top 25 Strategies

---

## 2019 Strategies

Following are the top 25 ranked destination organization strategies among the 64 strategies overall. Their change in ranking from DestinationNEXT 2017, or if the strategy is new this year, is indicated for each. The complete list of strategies is included in Appendix B.



## Strategy Rankings

## Change

1. My destination organization will enhance our engagement with the local community to manage future tourism considerations.	▲5
2. My destination organization will play more of a central role in advocacy in my destination.	▲3
3. My destination organization will focus significant attention to content creation and dissemination strategies.	▼1
4. My destination organization will invest more effort and resources into video content to market the destination.	▼3
5. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations.	▲10
6. My destination organization will act as conduit to build social networks among our local business community.	▲33
7. My destination will focus on developing authentic experiences for the customer.	▼4
8. My destination will have a tourism master plan to define long-term destination development.	NEW
9. My destination organization will design digital customer engagement primarily around mobile platforms.	▼1
10. The economic impact of tourism and conventions will be better understood in my destination.	▲2
11. My destination will better integrate tourism, economic development and talent attraction.	NEW
12. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics.	▲19
13. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact.	▲3
14. My destination organization will form more strategic alliances outside the tourism industry.	0
15. My destination will develop strategies to protect what we have while attracting events and visitation to our community.	▼8
16. My destination will develop ways to connect with customers through all stages of their experience from awareness to interest to booking to visiting to post-visit.	▼12
17. My destination organization will balance the need for growth with responsible and sustainable development.	▲11
18. My destination organization will develop outreach programs in our local community to broaden our networks.	NEW
19. My destination organization will leverage our region's priority sectors to generate business.	NEW
20. My destination organization will be more involved in economic development initiatives.	▼10
21. My destination organization will place greater emphasis on engaging with customers in two-way conversations, more so than one-directional communication.	▼12
22. My destination organization will acquire competencies and skillsets to effectively compete in a disruptive economy.	▲2
23. My destination organization will participate more in building platforms to improve the visitor experience.	0
24. My destination organization will connect visitor experience with the quality of life of residents in my community.	▼11
25. My destination organization will put a greater emphasis on market segmentation.	▼8

# 3 Transformational Opportunities

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**We believe that the future of destination organizations revolves around three transformational opportunities. Destination leaders need to leverage all three of these opportunities collectively to effectively lead their organizations today.**

## **1. Destination Stewardship**

Building public-sector coalition between the visitor industry, economic development agencies, academic institutions, and civic and philanthropic organizations. The goal is to curate more immersive destination experiences, manage sustainable visitor growth, promote equitable economic development, and elevate quality of life and quality of place.

## **2. Community Alignment**

Improving resident sentiment and government support around a shared vision for the future to accelerate important destination development initiatives, protect public funding, and improve hospitality culture. The value of the visitor economy and role of destination organizations must be better understood and appreciated.

## **3. Digital Conversion**

Developing more video and personalized digital strategies on mobile platforms to improve marketing effectiveness and drive higher sales in real time. Advancements in artificial intelligence, chat and other technologies are connecting industry and visitor audiences in new ways to accelerate conversion in our on-demand world.

Together, the three transformational opportunities provide an integrated framework to formulate strategic decision-making in any destination organization of any size or budget. They have evolved since DestinationNEXT 2017 based on:

1. Changing consumer motivations, behaviors and expectations in a highly disruptive marketplace impacting all facets of the global visitor economy
2. Digital advancements in search, customer targeting and engagement, artificial intelligence, mixed realities, voice and text chat, mobile e-commerce and other technologies
3. A more comprehensive understanding globally of sustainability through an integrated, three-pillar prism aligning long-term economic, social and environmental impacts
4. The critical need to include local community and key stakeholders in strategic planning, destination management and equitable economic development
5. All of the new and continually evolving macro social, political, environmental and economic issues disrupting the world order
6. The increasingly intense review of public funding and governance models reshaping how destination organizations drive business and engage their various audiences



“Destination leaders are collaborating more strategically with local organizations to develop more community-driven visitor experiences.”

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## Destination Stewardship

The most significant shift overall for destination organizations worldwide is the expanding role from destination marketing to destination management. According to the UNWTO in May 2019, “Destination management addresses the interactions between visitors, the industry that serves them, the community that hosts them, and the environment (natural, built and cultural).”

A growing number of destination leaders prefer the term “destination stewardship,” which speaks more to the growing role they have in influencing how government, the industry, visitors and residents interact, rather than directly “managing” the destination in any literal sense.

Today, destination organizations are focusing more intentionally on developing new destination experiences and stakeholder networks that incorporate a wider breadth of local companies and organizations, including many outside tourism and hospitality.

This is because there’s greater awareness today about how the visitor economy can be leveraged more effectively to drive equitable and sustainable economic development that benefits a broader spectrum of communities in a destination.

Likewise, destination leaders are collaborating more strategically with local organizations and residents to develop more community-driven visitor experiences.

In addition, destination organizations are stewarding their cities through many political, social, economic and environmental challenges disrupting the global visitor industry. They’re expanding resources dedicated to developing inclusivity and diversity initiatives; improving workforce development and customer service training; increasing partner education around emerging technologies and consumer trends; addressing myriad social issues impacting both the community and the visitor experience; and a host of other non-sales and marketing responsibilities.

That said, destination stewardship is not about distracting destination organizations from their traditional roles of promoting the region and driving higher visitor volume and spend.

Rather, by expanding their organization’s role in destination development and community building, destination leaders can increase sales and marketing opportunities because there’s a more immersive, connected, multidisciplinary visitor experience, and a more layered brand story to promote to the world.



## Trends Related to Destination Stewardship

1. Customers are increasingly seeking a unique, authentic travel experience.
12. Increasing importance of transparency and building partnerships to secure business to a destination.
15. Air access to a destination is a key factor in attracting business.
16. People are seeking more personal enrichment in their travels, including wellness and well-being.
17. Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts.
20. The brand of a destination is becoming a more important factor for destination decisions.
21. Governments are dealing with tourism from an integrated, multi-departmental perspective focused on economic development.
24. Young travelers are more aware of their impact on the communities and environment they experience.
26. Business event customers are looking for better collaboration with destinations and suppliers to achieve greater business outcomes.



## Redefining Sustainability

Destination stewardship is about embracing a more comprehensive definition of integrated sustainability, which collectively addresses the long-term economic, social and environmental viability for a destination. It's about balancing new business opportunities, visitor growth, environmental responsibility and quality of life while ensuring that residents across the region participate in, and benefit from, community-driven tourism and destination development.

This is not new. As far back as 2005, the UNWTO defined sustainable tourism as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities."

However, for most people both within and outside the visitor economy, the concept of sustainability is still typically used in relation to environmental stewardship. As the front door to the global visitor economy, destination organizations worldwide must unite around a more comprehensive definition of sustainability in order to guide the future of how they connect with global citizens more successfully, inclusively and responsibly.

The vision statement for the Yukon Government Department of Tourism and Culture in Canada expresses this long-term perspective well: "Our vision is for tourism to be a vibrant, sustainable component of the Yukon's economy and society for the benefit of future generations."

## Strategies Related to Destination Stewardship

7. My destination will focus on developing authentic experiences for the customer.
8. My destination will have a tourism master plan to define long-term destination development direction.
11. My destination will take steps to better integrate tourism, economic development and talent attraction.
12. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics.
15. My destination will develop strategies to protect what we have while attracting events and visitation to our community.
17. My destination organization will balance the need for growth with responsible and sustainable development.
19. My destination organization will leverage our destination's priority industry sectors to generate business.
20. My destination organization will be more involved in broader economic development projects and initiatives.
22. My destination organization will acquire competencies and skillsets to effectively compete in a disruptive economy.

“My destination organization will enhance our engagement with the local community to manage future tourism considerations.”

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## Community Alignment

The most effective destination organizations have the support of government officials and area residents who believe that the visitor industry positively impacts the local economy and elevates the overall quality of life for a diverse range of communities.

Clearly, more destination leaders are aware of this. The #1 and #2 strategies in the 2019 Futures Study are, respectively: 1) My destination organization will enhance our engagement with the local community to manage future tourism considerations; and 2) My destination organization will play more of a central role in advocacy in my destination.

This is not easy to accomplish in the short term. Building coalition among the public and private sectors to move a destination toward a common goal requires engaging many different audiences with opposing agendas. Therefore, destination organizations are focusing more on community advocacy to serve their residents.

This increases buy-in and improves community alignment, which helps drive competitive advantage for the destination. When government and residents agree on the value of the visitor industry to accelerate long-term economic and community development, then it's much easier to build support for new

destination stewardship initiatives that benefit locals and visitors.

Strong community alignment also helps destination organizations protect their public funding, which is being attacked more aggressively than ever before, often, but not always, for politically motivated reasons. That's why it's more critical than ever for destination leaders to show how their organizations are engaging and understanding their local community with the same level of intention directed at elected officials and industry stakeholders.

Today, some successful destinations are doing this by changing their key performance indicators and replacing traditional metrics such as room nights booked. The Hawaii Tourism Authority, for example, calculates resident sentiment as one of its four key measures of success (along with visitor satisfaction, per person spend, and total visitor expenditure).

Progressive destination organizations are visionary, innovative and aspirational, with the best interests of their communities at heart. But without a high level of community alignment, support and engagement, it can be challenging to implement new strategic initiatives that elevate the destination experience for travelers and improve livability for residents.



## Trends Related to Community Alignment

11. Communities more engaged in the development and management of the destination experience.
13. Organizations are increasingly developing strategic alliances across multiple economic sectors in order to leverage resources.
14. More communities and municipal governments are aware of the importance of tourism to local economy and job growth.
21. Governments dealing with tourism from an integrated, multi-departmental perspective, focused on economic development.
28. Business events increasingly shifting to be regarded as agents of long-term economic development for communities.

“The economic impact of tourism and conventions will be better understood in my destination.”

## Strategies Related to Community Alignment

1. My destination organization will enhance our engagement with the local community to manage future tourism considerations.
2. My destination organization will play more of a central role in advocacy in my destination.
5. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations.
6. My destination organization will act as conduit to build social networks among our local business community.
10. The economic impact of tourism and conventions will be better understood in my destination.
11. My destination organization will connect visitor experience with the quality of life of residents in my community.
13. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact.
14. My destination organization will form more strategic alliances outside the destination organization industry.
18. My destination organization will develop outreach programs in our local community to broaden our networks.
24. My destination organization will connect visitor experience with the quality of life of residents in my community.



Destination  Analysts

# The Importance of DMOs in a Crisis

A cooperative research study of 60+ official DMO Websites

## Overview

Preliminary Findings as of June 9<sup>th</sup>, 2020

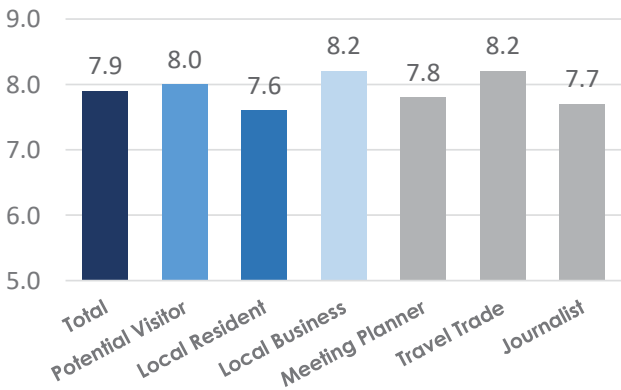
To benchmark the critical role Destination Marketing Organizations play during an active crisis like the coronavirus pandemic and measure the value of their communication assets, Destination Analysts is conducting a cooperative research study of the users of over 60 DMO websites. This study is the largest ever of its kind, and is designed to provide important insights into the audiences that the DMO serves—from local businesses, residents, and media to potential visitors, meeting planners and the travel trade—and the expansive amount of content the DMO is asked to provide. Following are key preliminary findings from this study.

## Destination Marketing Organizations: An Important and Valuable Resource to Many Audiences

A diverse set of people use the communication assets DMOs maintain, such as their websites—from those that represent significant economic generation potential like travelers, meeting planners, the travel trade and media, to those that foster the heart of the community, like local businesses and active residents.

Across these audiences, the DMO website is heralded as valuable, with an average score of 7.9 on a 10-point scale. It is also seen as important that the DMO is available to offer the information that it does on its website: 81.9 percent of DMO website users surveyed agreed that it was “important” or “extremely important” that the organization provided the information it did.

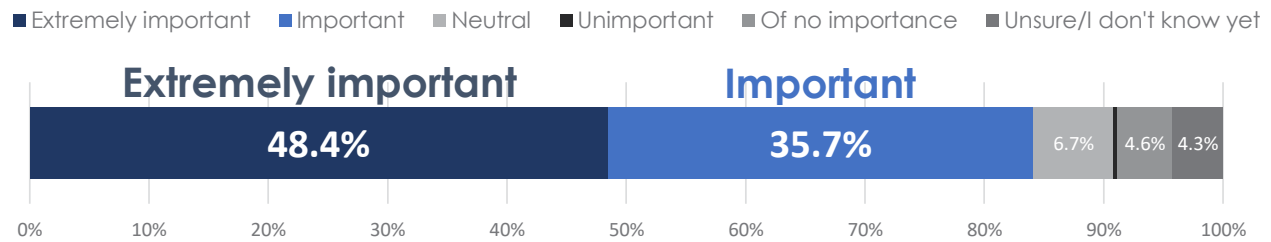
Value Rating of DMO Website as a Resource by Audience type



Q: How valuable of a resource do you consider this website? Base: 12,619



# Importance of DMO Information Offered on Website



Q: How important is it that our organization offer the information available on this website? Base: 12,619 completed surveys



## DMO Websites: An Engine for Economic Impact and Unparalleled Resource for Visitors During a Crisis

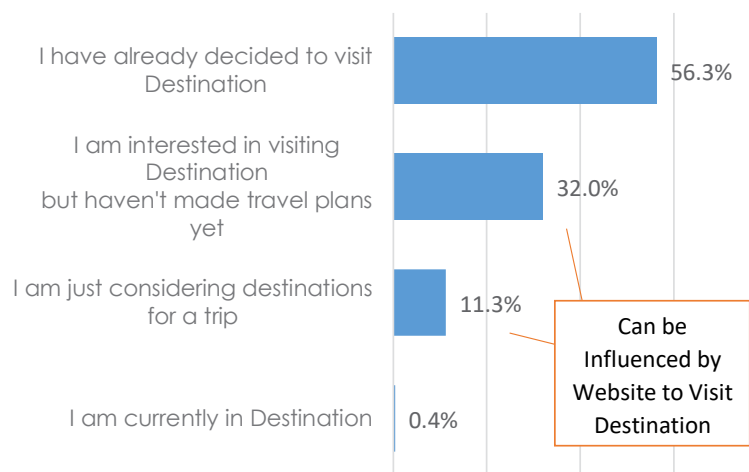
On average, nearly three-quarters of a DMO's non-resident site traffic is comprised of upcoming or potential visitors to the community they represent. While over half of these travelers have already made their decision to visit, 4-in-10 are still in a state of potential influence—highlighting the significant opportunity DMOs can capitalize on to convert these travelers into actual visitors and creating significant economic impact for their community.

### Non-Resident Users: Reason for Website Visit



Q: Which of the following best describes you? (Select one) Base: Non-resident, non-professional website users. 8,420 completed

### Point in Travel Planning Process



Q: Base: Which best describes where you are in the trip planning process? Base: DMO website users who are potential visitors. 6,173 completed surveys.



# DMO Websites: A Valuable Service for Local Businesses & Residents

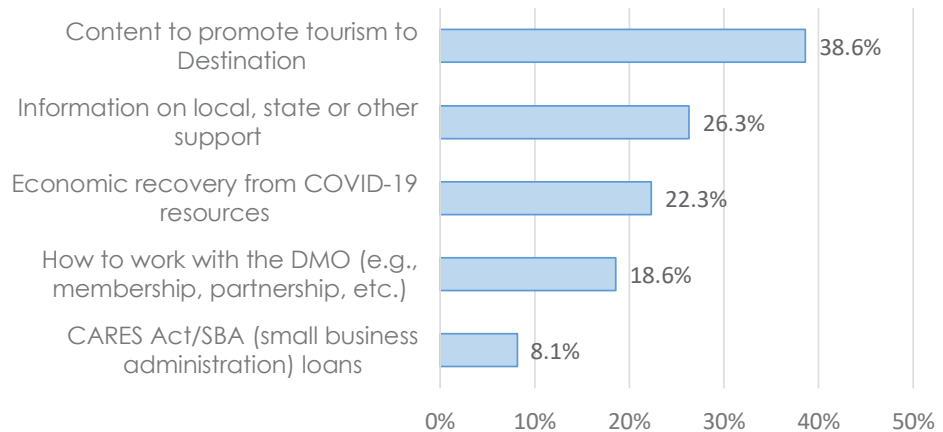
In addition to being rated as important, DMO websites provide a valuable service to their local business community and residents during a crisis like the coronavirus pandemic. With focus on tourism recovery, local businesses are turning to the DMO for not only content to promote tourism to their community, but advocacy and business-support related information.

Residents are most commonly coming to DMO websites right now looking for ideas, activities and things to do while practicing social distancing and researching activities for themselves and/or local family and friends: information, it should be noted, that largely encourages economic activity.

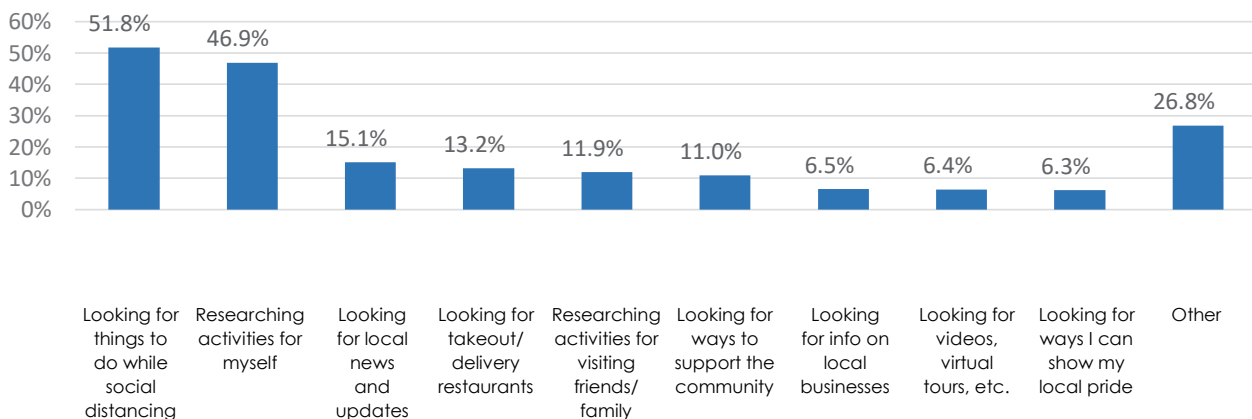


Q. Are you looking for any of the following information on our website? Base: DMO website users who represent local businesses and using the site for professional reasons. 479 completed

## Local Businesses: Information Sought on DMO Website



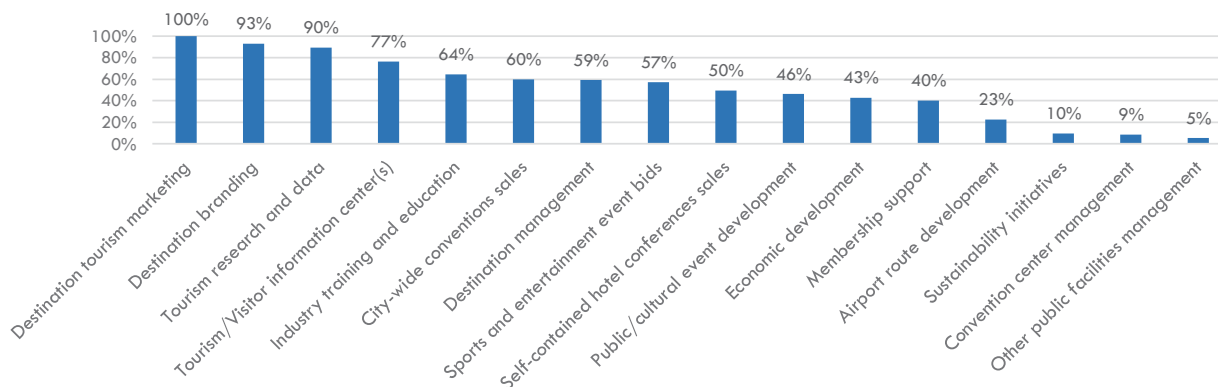
## Residents: Information Sought on DMO Website



Q: Which of the following describes your reason for visiting our website? (Select all that apply) Base: Local resident DMO website users. 3,707 completed surveys

# We Know How Important DMOs are to Their Communities. *We Have Measured It Many Times.*

On average DMOs are responsible for **10.1** different functions, including:



The work done by DMOs also has **MAJOR** fiscal impact:



For every unique DMO website visitor, **\$306** in direct **VISITOR SPENDING** is generated in that destination.

For every out-of-market social media follower of a DMO, **\$270** in direct **VISITOR SPENDING** is generated in that destination

For every unique DMO Visitor Guide requestor, **\$335** in direct **VISITOR SPENDING** is generated in that destination

Sources: The Future of Tourism Funding Study; DMO Website User & Conversion Study; DMO Social Media Follower Profile & Conversion Study; A Study of DMO Visitor Guides User, Profile, Usage & Conversion, Destination Analysts, Inc.

## Destination Spotlight: San Francisco

San Francisco's DMO, San Francisco Travel, employs a number of research studies to demonstrate their organization's expertise and advocate for their local tourism industry, including:

- **Visitor Profile**—to help tourism-serving businesses deeply understand their visitors and identify the global traveler segments with the highest positive impact to the city
- **Brand Awareness and Understanding**—to ensure the long-term health of the destination brand and identify and develop new markets, as well as protect their share in existing markets
- **Marketing Asset Economic Impact Studies**—to demonstrate the organization's accountability to top performance and ROI
- **Resident Research**—to track the awareness and support of the tourism industry's contribution to the local community

# COVID-19 U.S. Travel Sentiment Survey

## March-September Summary

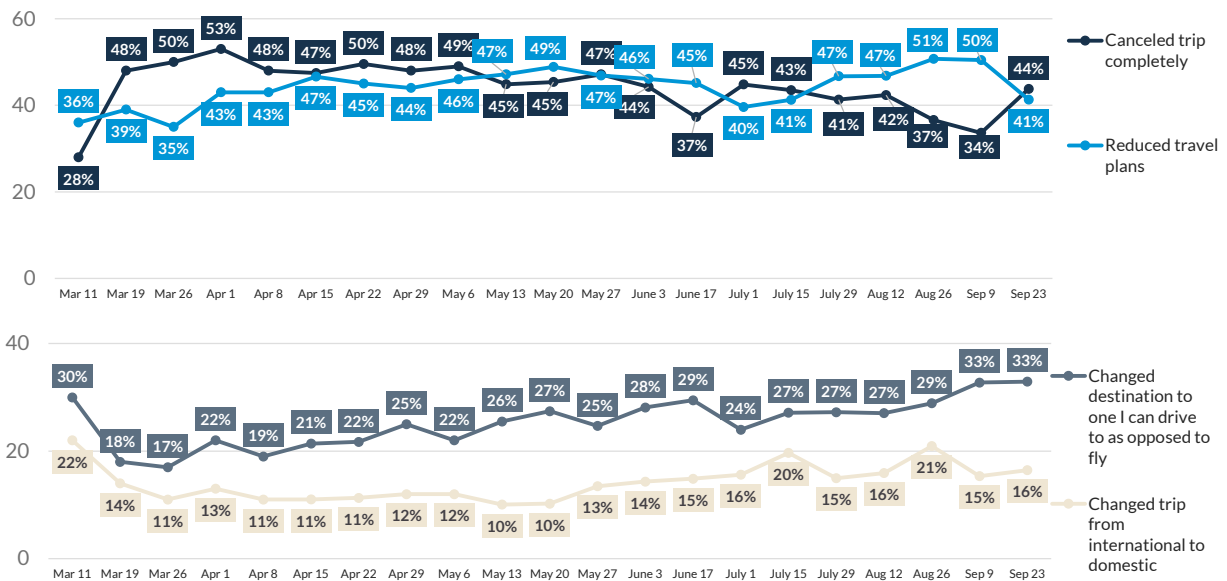
Since March 2020, Longwoods International's COVID-19 Travel Sentiment Study has tracked the perceptions, intentions and behavior of U.S. travelers during the Coronavirus pandemic. Sponsored by Miles Partnership, the study has surveyed a consistent set of questions every one to two weeks with a rotating list of custom questions probing topical issues. Just over six months into the pandemic, we have summarized the major trends and issues, challenges and opportunities that the research has highlighted.

[Learn more at longwoods-intl.com.](http://longwoods-intl.com)

### 1. A CAUTIOUS RECOVERY IN TRAVEL IS UNDERWAY

The initial spread of COVID-19 in March 2020 impacted or stopped the vast majority of travel across the U.S. and internationally. As of April 8, 85% of travel plans by Americans were canceled or deferred – the peak point of disruption. During the early lock downs and slow reopening in April and May, there was little sign of a recovery. Immediate travel intentions improved and then dropped back down through July as COVID-19 case numbers declined and then surged again. August and September saw stronger evidence of a cautious recovery with the number of travelers changing rather than canceling their trips growing sharply. The long-term outlook for tourism's recovery also looks robust. Pent up demand is real, and the desire to travel has remained strong and consistent. Throughout the entire pandemic around two-thirds of Americans still have travel plans in the next six months – tracking in a narrow band of 64% to 72% since April 1.

IMPACT OF COVID-19 ON UPCOMING TRAVEL PLANS COMPARISON



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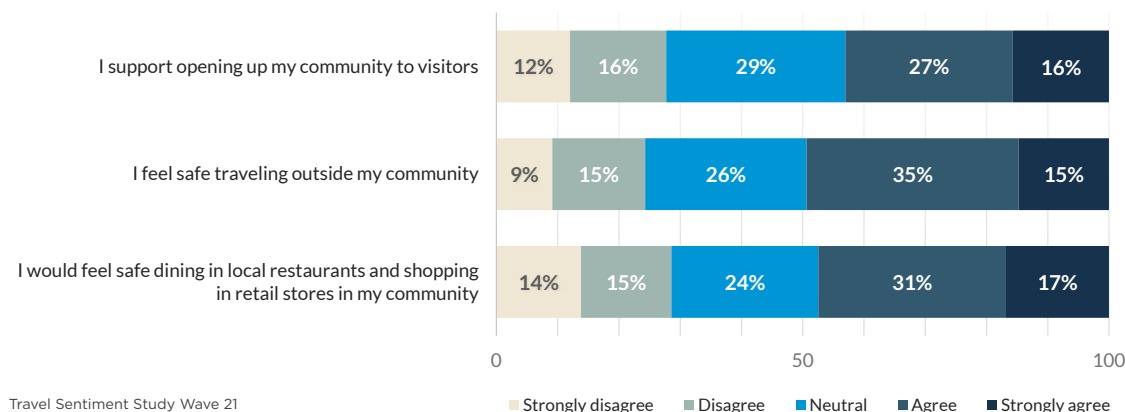
# COVID-19 U.S. Travel Sentiment Survey

March-September Summary

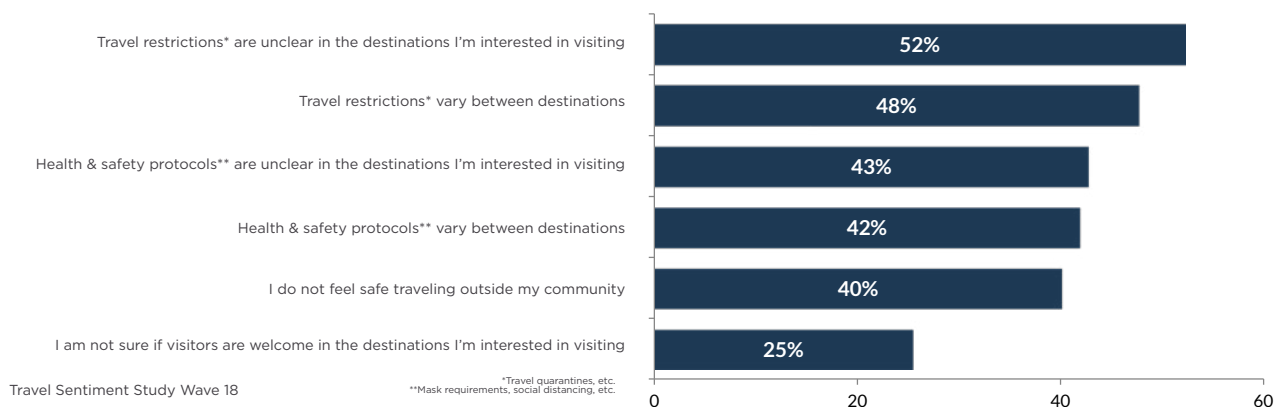
## 2. THE RECOVERY IS BUILT ON PERCEPTIONS OF HEALTH & SAFETY

Throughout the pandemic, the strong demand for travel collided with health and safety concerns. The survey has tracked how U.S. travelers feel through three fundamental questions for recovery: do they feel safe shopping or dining in their local community, opening up their community to visitors or traveling themselves? The percentage of U.S. travelers feeling safe in these decisions and activities remains at or below half of all U.S. travelers in late September in the range of 43% to 52% of respondents. A similar percent of U.S. travelers either do not feel safe in these activities or are undecided. One primary challenge has been inconsistent public advice and protocols. As of September, 86% of U.S. travelers are confused or unclear on travel restrictions and/or health and safety protocols in the destinations they are interested in visiting. U.S. travelers overwhelmingly want clear, consistent and mandatory health and safety information and protocols. For example, almost two-thirds (63%) want mandatory mask wearing. More clear and consistent health and safety protocols will be critical to the recovery of travel.

### PERCEPTIONS OF SAFETY AND TRAVEL



### I AM HESITANT TO TRAVEL BECAUSE...



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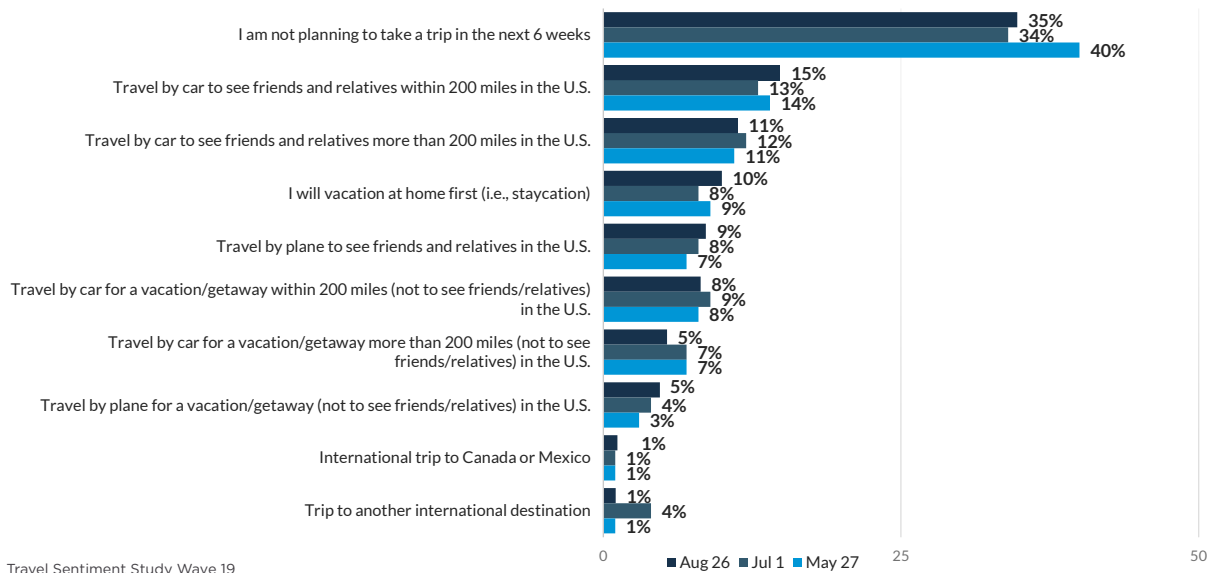
# COVID-19 U.S. Travel Sentiment Survey

March-September Summary

## 3. REACHING & ENGAGING WITH TRAVELERS DURING COVID-19

The research has reinforced how locals are fundamental to recovery. They are critical to the recovery of local businesses and to officials feeling comfortable reopening their communities to travelers. They are also central to stimulating travel to visit friends and relatives (VFR) – an important motivator for a majority of trips in the immediate recovery of travel during COVID-19. Much of these VFR trips are by road which has also grown in the pandemic, along with outdoor activities and exploring outdoor destinations in natural areas. Many of these have enjoyed record late summer travel volumes. Urban destinations, those relying on business travel and/or conference and events, remain heavily impacted. To reach travelers willing to explore, the research has highlighted the importance of a multimedia strategy. Print resources, along with short form video and traditional media (e.g.: TV) were the top three sources of travel content consumed by U.S. travelers during the pandemic.

### FIRST TRIP TRAVELERS WILL TAKE IN THE NEXT SIX WEEKS



## BOTTOM LINE

The brighter outlook for travel in the fall and winter remains clouded by a possible rise of COVID-19 cases, illustrating how the health crisis is the driving factor. As long as COVID-19 remains a significant part of American life, the recovery of travel will be cautious and uncertain. In the short-term, clear and consistent health and safety information and protocols need to be evident in tourism's response. Inspiration and calls to action will only work with travelers who feel more confident and clear on the risks and practical realities of traveling during the pandemic. In the long-term, the recovery for travel looks strong and the fundamentals driving tourism's remarkable growth over recent decades remain robust. The tourism industry needs to navigate the many challenges of the coming months in order to prepare for the recovery ahead, which will be certain to have a new landscape.

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# FUNDING FUTURES

Research Study into the Options & Opportunities for New or Enhanced Funding of Tourism & DMOs in Response to COVID-19

## Research Overview

Funding has never been more important to DMOs. In recent years as tourism has grown, questions have arisen about the fairness, sufficiency and effectiveness of tourism-related taxes and revenues in addition to the most appropriate way to fund DMOs.

Funding Futures is a major research project assessing the future of tourism and DMO funding. Undertaken by [Civitas](#), [Miles Partnership](#) and [Tourism Economics](#), the first phase reviewed and surveyed 115 North American cities, all 50 U.S. states and 10 Canadian provinces and modeled three recovery scenarios. The report also outlined 10 new or enhanced funding models for DMOs to consider for more balanced, resilient and sustainable funding.

Additional opportunities exist to understand the proposed funding models in more detail, including better defining the implementation and management of best practices, and Civitas and Miles Partnership are available to help with those services.

## Get in Touch!

Civitas and Miles are offering a **complimentary 30-minute discovery call** to discuss opportunities available for your DMO and support services we can provide. If you are interested in setting up a call, please [email info@longwoods-intl.com](mailto:info@longwoods-intl.com) and our teams will be in touch soon.

[EMAIL INFO@LONGWOODS-INTL.COM](mailto:info@longwoods-intl.com)

## 10 Key Recommendations

The Funding Futures report presented the following suggested actions items as short and long-term recommendations for both the collective tourism industry and individual DMOs.

- Review Your Role, Responsibility & Structure
- Gain a Deep Understanding of Your Current Funding Vulnerabilities
- Be Data Driven: Seek the Latest Research & Data
- Ensure That You Have Exhausted Every Option to Secure Emergency Funding
- Strengthen Predictability & Mitigate Risk in Your Current Revenue Streams
- Take Advantage of the Current Political Environment to Secure Action
- Explore Additional Funding Streams
- Build the Long-Term Diversification of Your Funding
- “Force for Good” and Review Regenerative Funding
- Be Agile

Review the full Funding Futures report at [milespartnership.com/FundingFutures](https://milespartnership.com/FundingFutures) for more information on these recommendations and additional insights for your DMO.

Request the report by emailing [info@longwoods-intl.com](mailto:info@longwoods-intl.com)



[milespartnership.com/FundingFutures](https://milespartnership.com/FundingFutures)

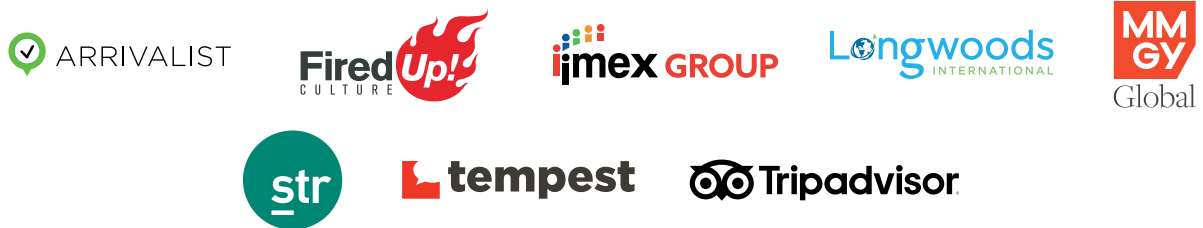


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# Room to Roam

Sun-drenched days, epic stays and good clean fun aren't cancelled in Greater Fort Lauderdale. Our hotels, attractions and restaurants have taken the Visit Lauderdale Safe + Clean Pledge so you can relax and explore with confidence. [Learn more at sunny.org](https://www.sunny.org)

## VISIT LAUDERDALE







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