



DESTINATIONS
INTERNATIONAL

CEO **2020** SUMMIT

TRANSFORMATIONAL LEADERSHIP

DECEMBER 15-17, 2020
SUMMIT PROGRAM BOOK

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WELCOME TO THE 2020 CEO SUMMIT.

DEAR MEMBER,

Let me begin by thanking you for taking the time to participate in this year's virtual CEO Summit.

It goes without saying that 2020 will go down as one of the more difficult years in history. However, it will also go down as the year of progress and a year where we collectively work together to address the issues directly resulting from the global pandemic. This year has also been a year that we all came together to collaborate with each other across the world and coordinated with our industry partners for critical data and resources.

This year's summit theme is "transformational leadership" and we are thrilled to take you through a journey led by thought leaders focusing on thought provoking conversations and inspirational ideas.

Special thanks to all of our partners who have been unwavering in their commitment to provide important research, data and thought leadership on the many subjects and topics so important during the pandemic. In addition, special thanks to all of our members for their commitment to Destinations International and our industry during this highly challenging year.

We at Destinations International are grateful and humbled by the incredible level of support that we have received during the global pandemic. We thank you and we will continue to do our very best as we enter the very important stage of recovery.

Best regards,



A handwritten signature in black ink that reads "Don Welsh".

Don Welsh
President and CEO
Destinations International

AGENDA

ALL TIMES ET

DECEMBER 15

Welcome & Orientation	1:00PM-1:15PM
Opening Keynote: Designing Your Business for the 21st Century	1:15PM-2:10PM
Breakout Discussions	2:20PM-3:20PM
Fireside Chat with Brand USA	3:20PM-3:55PM
Reflecting on the Good of 2020	4:05PM-4:25PM
Transformational Leadership in Action	4:30PM-5:00PM

DECEMBER 16

The Brains of Influence	1:00PM-1:20PM
What's Next for Simpleview?	1:20PM-1:35PM
Breakout Discussions	1:35PM-2:40PM
The Elephant in the Room	2:50PM-3:25PM
Breakout Discussions	3:30PM-4:30PM

DECEMBER 17

Adaptation Advantage: Leading in a Post Pandemic World	1:00PM-2:05PM
Looking Ahead: What Will Leadership Look Like in 2021	2:15PM-3:15PM
A View From The Top	3:15PM-3:35PM
Closing Wrap-Up	3:35PM-3:50PM



CORPORATE
PARTNER

ABOUT

Adara, the global leader in permissioned data and verified identity, combines the power of global data consortiums to inform its one billion digital identities with over 22 billion data elements across 130 countries and serving Global 2,000 customers. Whether informing digital marketing, programmatic advertising, search, identity and verification, or stopping fraud, Adara provides you with more customers, less friction and better outcomes.

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ARRIVALIST

PREMIER
PARTNER

ABOUT

Arrivalist is the leading location intelligence platform in the Travel industry. The company uses mobile location datasets to provide actionable insights on consumer behavior, competitive share, media effectiveness, and market trends. Over 200 travel marketers, including 100 Cities, 40 US States, and 4 of the top 10 US Theme Parks, use these insights to inform media strategy, operations, and destination development.

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Arrivalist



Geo-location Data

- 120 million device panel
- Multiple GPS Sources
- Balanced to geographically represent the U.S. population
- Transportation agnostic



Omni-Channel Measurement

- AD ID based solutions: Digital, TV, OOH, Radio
- Integrated with LiveRamp
- Managed Service or Self-Service options available



Incremental Impact

- Measure Arrival Rate, Arrival Lift, and Stay Lift
- Origin Markets of Visitors
- Locals vs. Non-Locals
- Days & Distance to Arrival

Media Measurement

Case Study: Connected Device Measurement

Doubling Down on Connected TV: Utah Office of Tourism

Case Study Courtesy of:





1 Day, 19 Hours

Average Length of Stay in Utah for Consumers Exposed to the '3 Season' Connected TV Campaign

77.8%

Incremental increase on consumer arrivals to Utah

Consumers exposed to the '3 Season' connected TV campaign were 1.8X more likely to travel to Utah than a control group



103 Days

Average number of days between exposure to the '3 Season' campaign and arrival by exposed consumers in Utah.



More Case Studies at Arrivalist.com

Summary

The Objective

The Utah Office of Tourism and their media buyers at Love Communications needed to measure the incremental impact of a connected TV campaign on qualified consumer arrivals to the state.



The Campaign

The '3 Season' campaign utilized connected TV advertising to target potential leisure travelers in 5 western U.S. states. Over 261M impressions and over 130,000 exposed arrivals related to the campaign were recorded between March 2019 and July 2019.



The Results

The campaign returned strong results. Consumers exposed to the '3 Season' campaign were 1.8X more likely to arrive in state than unexposed consumers and 72.9% spent at least one night in Utah. Based on these strong results the client and agency doubled their connected TV spend for a follow up campaign focused on skiing in Utah.



ABOUT

ASAE is a membership organization of more than 46,000 association executives and industry partners representing 7,400 organizations. Our members lead, manage, and work in or partner with organizations in more than a dozen association management disciplines, from executive management to finance to technology.

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ASSOCIATIONS
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MARTIN BARRAUD/GETTY IMAGES

Shifts in an organization's mission, strategy, and leadership can feel like an earthquake for staff, which makes focusing on **organizational culture** a critical **element of change management**. Seasoned leaders describe what it takes to navigate the cultural aspects of change well. **BY MARK ATHITAKIS**

The Project Management Institute is changing. A new CEO came on board last spring, and last year PMI began retooling to become what it calls an “association of the future.” It’s established a new set of values statements, and consultants have arrived to perform talent assessments of staff. Lines of authority are being redrawn. Silos are getting busted.

For the staff, it can all be a little scary, says Kristin C. Hodgson, CAE, PMI’s manager, global chapter development, North America.

“We’re working on moving from a silo to a matrix organization, and that makes a lot of people very nervous,” she says. “For people who don’t like change, managing organizational culture is really a tough thing to take.”

Association leaders who’ve guided their staffs through change recognize that a strong organizational culture is critical—including at times when the CEO is the change. Transformation likely won’t be painless, but with a lot of communication and an emphasis on transparency, leaders can reduce the turbulence and help staff weather the storm.

How Things Work

Any substantive change at an association—a merger, new executive leadership, a retooled strategy or mission—is going to affect its culture. So, what exactly is an association's culture?

"The most simple definition is 'It's the way things really work here,'" says Jim McNeil, executive vice president and chief executive of business and trade industry practice at SmithBucklin. "It's easy to define a culture on paper or [write] a wonderful cultural statement, but it's how things really work, and that's what you need to figure out if you're going to lead and change around that."

At PMI, the need to develop that understanding led to the launch of a dedicated office focused on change management. A team, including Hodgson, was charged with helping to shepherd the staff through the reorganization and to better understand their concerns.

Transparency about the process, Hodgson says, made staffers more comfortable talking, but they had pointed questions: How much more

will be asked of me? How "voluntary" are those voluntary roles on transformation projects?

"You really have to understand your staff and what is going to unsettle each of them," she says. "And if they don't bring it up to you, you have to be able to bring it up to them."

Since 2015, the American Association of Pharmaceutical Scientists has been implementing a new strategic plan, restructuring its annual conference, and flattening its component structure. For Joy Davis, CAE, AAPS managing director, member products, those changes have required the association to connect with staff one-on-one and collectively. She talks with staff individually, because each needs their own kind of reassurances. "There are people lined up outside my office some mornings," she says.

But, she says, staffers also want visible evidence that the changes are happening collectively, and that they matter. To that end, last year AAPS coated a wall in its office lobby with

blackboard paint and invited staff to add successes, large or small, to the board as the year goes on.

"Some of it is relatively small that relates to a couple of teams, and other things are very, very important, that a board member would absolutely get," she says. "But they're writing up their successes for everyone to see, and that blackboard has a psychological impact on people."

Such activities are manifestations of the critical need to engage with the staff's concerns early on to better understand how things really work in the organization.

"A lot of change management is uncovering the stories people tell about the organization," says Carol Hamilton, principal of Grace Social Sector Consulting. "You're airing the assumptions people have about how they do their work to bring those to light. There are also microcultures within an organization, and people are likely to experience the culture differently depending on where they're sitting."



YOU REALLY HAVE TO UNDERSTAND YOUR STAFF AND WHAT IS GOING TO UNSETTLE EACH OF THEM."

Kristin C. Hodgson, CAE
Project Management Institute



PHOTOGRAPHY BY COLIN LENTON



I HAVE COACHED OUT PLENTY OF STAFF OVER THE YEARS WHOSE WHAT WAS FANTASTIC, BUT WHOSE HOW DID NOT COMPORT WITH THE CULTURE WE WERE TRYING TO BUILD.”

PETER J. O’NEIL, FASAE, CAE
ASIS INTERNATIONAL

Talk It Out

Association executives leading through change agree that it’s all but impossible to overcommunicate during the process. Rhea M. Steele, CAE, chief operating officer of DECA, which prepares emerging leaders for careers in marketing, finance, hospitality, and management, says that change processes often require new terminology for staff and volunteers, and leaders need to be attentive to how that new terminology is taken up—or isn’t.

“If I’m looking to get employees to shift from using the term ‘customer’ to the term ‘member,’ I want to be thinking about cues that’ll help me see it’s actually started to be embedded in the organization,” she says. When she sees the change taking hold, “I can reinforce that with them, saying, ‘Hey, thanks so much for using the new language we’ve been talking about.’”

Jeffrey Shields, FASAE, CAE, president and CEO of the National Business Officers Association, recently led his staff through a culture-change process as part of a retooling to move away from a dues-heavy financial structure. That process codified four main themes: respect, collaboration, trust, and accountability. Those words are familiar enough, but centering organizational conversations on them—and having a lot of those conversations—has been transformative, Shields says.

“It’s part of how we talk to people about joining our staff—it’s part of our interview and hiring process,” he says. It’s also surfaced candid conversations about how work is done at the office, which has led to a new, more open policy about telework.

“It may sound like a small incremental thing, but for us it was a big deal. I don’t think those issues would have come to the surface had we not explored our culture more fully,” Shields says.

Act Fast

AAPS’s Davis says she wishes her association’s change process had gone faster to better clarify the changes for staff and make their attendant frustrations as brief as possible.

“One of the problems we have with big change initiatives, especially in associations, is we want to slow down and get consensus and get

everyone on board,” she says. “But in slowing down, the people who were leading the change start to cycle out. It becomes difficult to convert the people who are cycling in. You must worry less about consensus and more about ‘We need to get through this so that we’re through the painful part and we can get to the part where things are good faster.’”

When Peter J. O’Neil, FASAE, CAE, became CEO of ASIS International in 2016, he moved quickly to identify trouble spots among staff. Within his first month on the job, he began encouraging employees who had not been performing well or who seemed a poor fit for the organization to consider other options.

“What you do is very important to your success and to the success of the organization, but I also believe that *how* matters more in culture,” he says. “I have coached out plenty of staff over the years whose *what* was fantastic, but whose *how* did not comport with the culture we were trying to build.”

That kind of quick action can feel brusque, but it minimizes confusion about where an organization wants to go. During any major change initiative, leaders agree, staff are owed clarity about what the change will mean for them.

“You can’t just not talk about what’s going on,” DECA’s Steele says. “If you’re not communicating with staff, they’re going to make up their version of events.”

MARK ATHITAKIS is a contributing editor to *Associations Now*.
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Read More Online

READ THESE STORIES AND MORE AT ASSOCIATIONSNOW.COM

- “How Change-Management Coaching Helped One Group Deal With Growing Pains,” Allison Torres Burtka, February 6, 2019
- “First Steps to Better Employee Engagement,” by Mark Athitakis, February 3, 2019
- “Avoid the Pitfalls of Change Management,” by Mark Athitakis, August 26, 2018



BARKLEY

**CORPORATE
PARTNER**

ABOUT

Barkley is an independent, creative idea company that builds potent modern brands, inside and out. We believe the only brands to survive will be the ones that evolve at the rate of the consumer. In the last decade, Barkley has become one of the preeminent experts on the Modern Consumer. We're committed to knowing the modern consumer better than anyone else and building brands to meet and lead them. We do this through our three idea centers: strategy, design, and activation.

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The 360° Advantage

How Whole Brands Dominate

This is the most vital time in history to be in the brand-building business.

While most brands — what we call fragmented brands — are scrambling to find their footing, whole brands are creating sustainable and dominant growth. This reveals a new mindset for how modern business leaders are embracing a new, 360-degree definition of brand — as the sum of every experience a consumer has with a company or organization. Such leaders understand that every action they take, inside and out, is their brand.

Whole brand thinking leads to companies, organizations, teams and people that understand they are all responsible for the brand, not just the marketing department. They apply creativity across the whole brand spectrum (see right page), the vast array of actions available for brand-building, from business ideas to marketing ideas. This spectrum is a workshop

and playground, a starting point for idea development that will make the brand as valuable as possible.

Whole brand thinking solves for the complicated problems that result when the parts that make up a business aren't working as one. It is a powerful tool for opportunity spotting, internal integration, collaboration, alignment, communication and growth. When a business works as a unified whole, it evolves into something much greater than the sum of its parts: A whole brand.

Such brands are designed for growth, outperforming competitors and building market value and superiority as a result.

The following report contains the results of our first Whole Brand Study: an analysis of 123 brands in 16 categories. It's an introduction to both the model and measurement (Whole Brand Index) of the power and performance of such brands.

Four elements of a whole brand

We developed these 4 attributes of a whole brand based on how modern consumers view and experience brands. While our study delves into the performance measurements of such brands — product, brand culture, experience, design and communication — we have made correlations to complete this definition and determine which brands are truly “whole.”

Becoming a whole brand is no easy feat: Most brands live in a space between fragmented and whole. Our prediction: whole brands will continue to dominate now and well into the future.

THE 360-DEGREE ADVANTAGE | FOREWORD

In today's market, brands can't hide. Now more than ever, consumers and communities demand transparency and valuable impact for brands. No longer can a company be one thing and a brand be another. They are one in the same forevermore. This requires business leaders to scrap old definitions and commit to a new mindset that treats everything as brand.

This is the first of many examples of how whole brands will dominate markets to come, giving marketing leaders for brands and their C-suite counterparts proof of the impact of 360-degree thinking and how a collective, systematic approach to brand building can change the trajectory and future of brands.

Whole Brand Spectrum

Business Ideas

Inside

Brand Culture

Model

Products + Services

Design + Experience



Marketing Ideas

Outside

Content

Actions

Experiential

PR

Advertising

1

A whole brand is an organization that treats everything it does as the brand.

2

A core, long idea guides, inspires and connects every action a whole brand takes, across the spectrum of marketing ideas to business ideas. We call this the red thread.

3

A whole brand is full of purpose and action, and it matches what it says and does internally with what it says and does externally.

4

A whole brand measures success holistically by balancing profit and performance across the Whole Brand Spectrum with its impact on people, communities and the planet.

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**PINNACLE
PARTNER**

ABOUT

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011. As one of the best levers for driving economic growth, international travel to the United States currently supports over two million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked in close partnership with more than 900 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America. According to studies by Oxford Economics, over the past seven years Brand USA's marketing initiatives have helped welcome 7.5 million incremental visitors to the USA, benefiting the U.S. economy with nearly \$55 billion in total economic impact, and supporting more than 50,000 incremental jobs a year. Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

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CFOby design

**PRINCIPLE
PARTNER**

ABOUT

We are a virtual CFO firm working with our clients to establish a solid operational foundation. We focus on understanding your financial health, forecasting, cash flow projections, budget development, scenario planning, internal controls and policies, exceptional financial reporting and outsourced accounting and CFO services.

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ABOUT

At Clarity of Place, we look beyond the traditional linear, cause-and-effect approach to problem solving and consider how the various parts of a destination are interconnected and influence one another. We believe this iterative process helps destination organizations more effectively manage their programs. Connect with us and let us show you how our process can help your destination rebuild.

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Plotting a Post-COVID Path

As the devastating effects of COVID persist, our industry continues to look for ways to get back on track.

Rather than channeling our best fortune-teller persona to predict what our post-COVID world will be, we think a more helpful discussion tool for destination leaders is a primer on ways communities can rebuild through tourism and nurturing and sharing the community's quality of place.

This article shares our thoughts on how destination leaders might plot their new path forward using a mix of design thinking, a systems approach, and channeling our industry's superpowers.



Anchoring Destinations in the Community System

Whether written in their mission statement or exhibited in the things they do, destination organizations function as part of their larger community's growth and place-making efforts.

They are part of the "system" of their community in which different parts (e.g., destination management, economic development, municipal government, residents, companies, etc.) interact with each other through defined (and sometimes undefined) processes to make their community a better place to live, work, and visit.

Within each community system, there are a series of relationships and leverage points. If you understand what the parts (nodes) of a system are and how they influence and affect one another (links), you can find ways to adjust the leverage points and make the system work better. The "parts" are the same whether you are a destination organization, the city manager, or the economic development agency, but the relationships and the leverage points you control are different.

At Clarity of Place, we built our practice on the supposition that if we can identify those relationships and understand the leverage points, we can help destination organizations. We can help them recover and pivot from the devastating effects

of COVID; we can identify ways to regroup and chart a path forward; and/or we can interpret the role they play in their community, and devise targeted actions that have greater impact.

Understanding the System

It starts with understanding the community system in which destination organizations work.

Consider the difference between trying to impact two different types of systems: forecasting the weather and managing a baseball team.

"Natural" Systems

Altering the weather requires introducing forces that can change chemical or physical reactions. For example, if we wanted a better chance of snow, we would have to cause a warm front to flow up and over cold air and cause its water vapor to condense into ice particles. The relationship between the warm and cold fronts is understood and the impact of the effect of many variables for a given point in time can be calculated.

The variables affecting weather are relatively finite, but they are difficult to impact (unless you have a plane that seeds clouds or pushes fronts).

"Human-driven" Systems

Altering a baseball team's season is trickier given the inherent human element. Unlike weather fronts, when a batter meets a pitcher, the

outcome isn't as easy to predict as a natural, chemical reaction.

The batting outcome depends not just on whether the pitcher throws a strike or if the batter makes contact with the ball, but also if the ball is fielded correctly and if the runner is fast enough to beat the play. The game's outcome is dependent on multiple batter-pitcher encounters and player-ball fielding instances over the course of the season.

Continuing the analogy, however, finding the levers or potential ways to effect the game is easier than changing the weather. If the catcher notices that the batter is swinging early, she can call for a change-up (slower) pitch and likely watch the batter strike-out. However, player reactions are more difficult to predict.

Community Systems

Having an impact on communities and destinations is more similar to managing a baseball team. The "system" that makes up communities is comprised of people and is driven by human-decision-making. While there are some patterns beyond our control, the majority of links (i.e., where destination organizations can have impact) can be influenced. If we know what the links are and the characteristics or strengths of the given node (partner, stakeholder, or other placed-based organization), we can be more effective in our response and a stronger contributor to our community.

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The “system” in which our industry operates has fundamentally changed. Many of the existing programs and solutions that served destinations well in the past are now obsolete – or at least need to be re-examined and re-thought.

Ill-defined & Unknown Paths

Even before the start of the pandemic, this task of finding effective impact points for destination organizations was complicated. The speed at which content has become digitized, the ability to track mobile devices as a way to measure impact, the continued trend towards experiential tourism, or the ability of would-be-travelers to learn about a community at the touch of a button (or more specifically the launch of a Google search) are just a few examples of the many new variables destination leaders must consider when deciding how to impact travel and encourage economic activity in their community.

Add the impacts of closures and the need for social distancing brought on by COVID and the new (or perhaps, “revitalized”) relationship between destination organizations and their local businesses and residents and the complexity of issues facing destination organizations increases exponentially.

Enter Design-thinking

Because the community system in which the travel and hospitality industry operates has fundamentally changed, many of the existing programs and solutions that served destinations well in the past are now obsolete—or at least need to be re-examined and re-thought. To find a new path forward and address the new market realities, destinations leaders need to approach “what’s next” from a different mind-set.

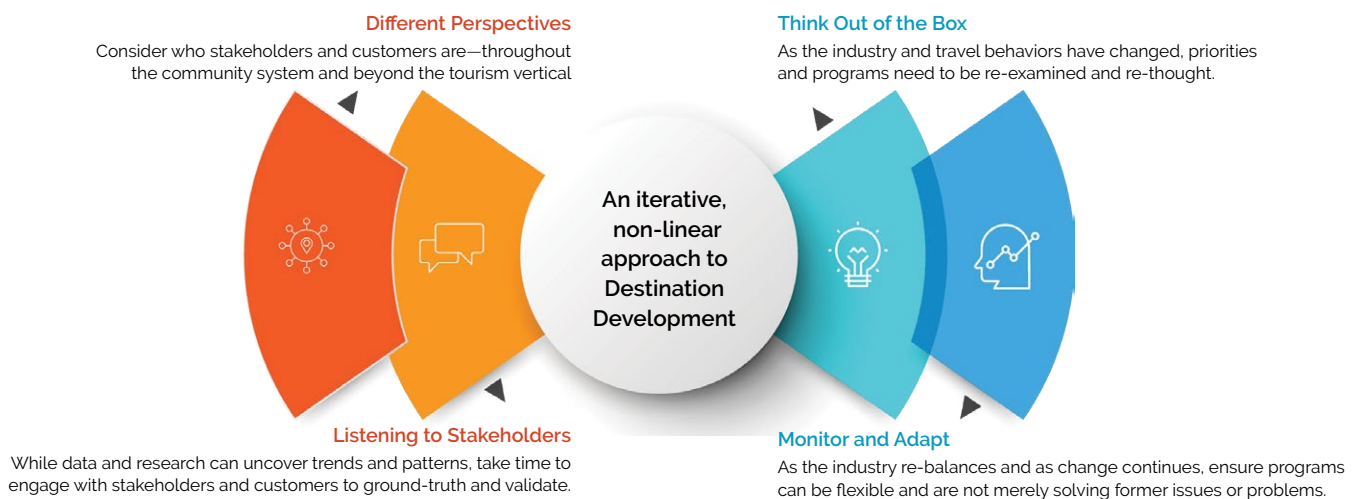
In *The Design of Business*, Roger Martin posited that organizations could use “design-thinking”—a mixture of analytical thinking and intuitive thinking—to maintain long-term competitive advantage. The non-linear, iterative process helps teams or organizations find a balance between relying on proven processes that solved past problems, while not losing sight of what is different and identifying potential ways to exploit what is new in the market. The combination of the two perspectives allows organizations to analyze the past, take advantage of available data, and understand the new systems to plan for a more optimal future.

At Clarity of Place, we believe that destination leaders can use this iterative process to plot their path forward in the new travel market that emerges on the other side of COVID. This means finding new approaches and new alternatives to balance desirability (what visitors and residents need/want from the destination) with feasibility (what assets and products the destination has or can develop) and economic viability (what can the community afford given resources and other needs).

Desirability ↔ Feasibility ↔ Viability

However, merely making incremental tweaks to existing programs or continuing with linear cause and effect solutions around past problems will not suffice.

Thinking Iteratively About Destinations



Channeling the Avengers

Now that we've made the case for adopting a different mind-set in plotting the course forward, we'll channel our Avenger-geekdom to offer skills destination leaders can put to use.

With apologies to Marvel fans, we couldn't resist using an Avenger-style story-line to illustrate our point. For non-Avenger fans, please continue reading; like all good Marvel productions, if you stick around until the end, the themes and plots will come together.

Regaining Balance

In *Infinity Wars*, the penultimate movie of the Marvel Avenger series, a cosmic villain named Thanos assembles the necessary Infinity Stones and destroys half of all life in the universe. Some of the Avengers (i.e., super heroes and all around good guys) survive, but some are disintegrated with a snap of Thanos' finger.

Fast-forward to *Endgame*, the final movie in the series. The Avengers that remain are found trying to pick up the pieces. The universe that they were sworn to protect looks a lot different. Their status quo has been shaken. Through various plot twists, they reunite and decide their mission is to restore the balance in the universe.

Without digressing even more, while destinations don't face a cosmic super villain, they do face an disheveling of their industry and the behaviors that drive it.

Since destination leaders don't have the luxury of time travel that the Avengers eventually availed themselves of, they will need other problem-solving processes to regain balance and begin addressing the many trends and new variables facing their community's system.

Avenger-inspired Lessons

Here are three existing skills inspired by a mix of design-thinking and lessons from the Avengers that destinations can employ as they start plotting their new path forward.

Three Superpowers to Employ

1. Understand Community Needs

And build solutions for their needs



2. Think Out of the Box

Re-imagine skills and partners



3. Don't Wait for Perfection

Innovate and test



1. Understand what your community needs and build solutions to meet those needs.

A relatively new Avenger, Mantis is a *Guardian of the Galaxy* (a separate movie series) whose superpower is empathy. Her ability to sense and experience a person's emotions allowed her to understand fellow Avengers' (and villains') potential and vulnerabilities. Her character is a reminder of why it's important to understand the situation and everyone's perception of the current state and their needs.

As conversations around community shared value have emphasized, the "customers" that destination organizations serve extend beyond visitors and traditional destination assets and partners. Campaigns to encourage communities to support local visitor-facing businesses during COVID and pivots in marketing to

residents and drive-markets are examples of broadening a destination organization's footprint.

Moreover, as local governments feel the impacts of reduced tax revenue, destination organizations are reminded of the critical role lodging and other sales taxes play in balancing budgets or paying for infrastructure. Organizations across the community (e.g., economic development, cultural and arts, or philanthropic organizations) also appreciate the role, as well as are reminded of the importance of tourism in nurturing quality of place.

In plotting their new path forward, destination organizations should consider their broader audience and uncommon suspects—both as customers and potential allies.

2. Think out of the box and out of traditional silos

Endgame is replete with examples of how the group was forced to step out of their comfort zones to devise a way to regain balance in the universe. Thor's re-entry into the fight is one notable act of thinking beyond traditional silos and solutions. To make a long story short, in *Endgame*, Thor falls victim to turning to nachos and beer to cope with the post-Infinity Wars world (Marvel was rather prescient in predicting the impact of sheltering in place). The former God of Thunder known for his strength, competitive zeal, and resilience devolved into a despondent couch potato, unsure of his worth.

Never giving up on a fellow Avenger (and needing all hands on deck), the remaining Avengers convince Thor to rejoin the battle and pair him with Rocket (an unlikely partner also of *Guardians of the Galaxy* fame). Together with his new weapon, Stormbreaker, and some critical mentoring from his mother and Rocket, Thor is able to re-focus his power and contribute to the epic battle.

So what does this mean for destinations? The immediate and continuing impact of closures and social distancing due to the response to COVID is unprecedented. Unlike the effects of past market shocks, COVID has altered many of the foundations and strengths upon which the travel and hospitality industry rests. While some of the fundamentals of our industry will endure, others have changed drastically and many of our partners are wounded.

To respond to the new reality and an industry left with fewer players and resources, destination organizations can take cues from the Avengers and re-examine how they find new alliances to employ their "powers." It may mean programming their talents in a different way—as destination organizations did when they stepped up to market inward to local audience during the closures of the spring. It could also mean crafting new tools to solve new problems. Finally, it should entail taking stock of their new universe or system and re-envisioning ways to work with new or old allies towards new shared goals.

3. Don't wait for perfection

In *Spider-Man Homecoming* (admittedly not directly in the sequence of the Avenger series, but necessary to build up the reference), the young Peter Parker uses his high-school chemistry knowledge to create a webbing formula and his sewing skills to create a make-shift suit, knowing that he needed tools to fully leverage his new found powers. Neither are of the quality of suits or tools that would eventually emerge out of Tony Stark's lab, but they were sufficient enough to carry out the tasks at hand and to prove to Spider-Man how he could make an

impact. They were his own minimum viable product that helped address problems thrust upon him and his school friends.

"Just because something works, doesn't mean it can't be improved."
— Shuri, Black Panther

Just as Peter Parker couldn't wait for Tony Stark to build the perfect suit to battle the Q-ship (the enemy's Trojan Horse for inter-stellar travel) in *Infinity Wars*, destination leaders should be willing to "fail fast" as they devise programming and partnerships to test new possibilities.

Destination organizations can begin by brainstorming potential solutions/paths based on the new system in which they find themselves (remember super power #2) and know that the ultimate solutions to these ill-defined problems will be a series of adjustments and improvements. Using existing tools, historical trends, and industry intuition as a guide, destinations can begin crafting their new tools and practices.

Closing Credits

Spoiler Alert: The Avengers are victorious, in large part because they banded together, marshaled their superpowers (actions), and devised a plan to alter the course of their new reality.

Destination organizations are facing our own version of a drastically changed universe. Whether the effects on travel behavior or gathering can be completely reversed is still to be determined. Nevertheless, resilience and nurturing (and fighting for) their community is in every destination organization's DNA—as is banding together as an industry to help each other in times of need.

By thinking out of the box to apply strengths and existing skills to exploit what's next, sharing best practices, and watching each other's back, destination organizations can continue to bring value to the partners, communities and the industry they serve.

■ ■ ■

As Marvel fans know, after the credits roll a film snippet appears to offer extra context or provide comic relief. In addition to this Avenger inspired framework, we leave you with a few post-credit gems:

- The Avengers version of what destination organizations do: https://youtu.be/gnEl_QlxO1Q
- TED Talk by Tim Brown, CEO of IDEO: *Design Thinking's value in solving extremely complex challenges*: <https://youtu.be/UAinLaT42xY> - (especially 2:06 - 4:20 and 12:41 - 13:37).
- Roger Martin's The Design of Business: <https://roger-lmartin.com/lets-read/the-design-of-business>



Please contact us to continue this discussion!

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Connect

PRINCIPLE
PARTNER

ABOUT

We help planners and suppliers gain education and professional development to advance their careers while getting business done through one-on-one marketplace appointments.

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*Senior Director of Marketing
& Events*

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THE SHOW MUST GO ON.

Read more
about our
Safe + Clean
plan on pg. 4.

This became our leadership philosophy in 2020. Pivot, flexibility, change... these words have become synonymous with 2020, but our leadership truly walked them out over the course of nine months.

We consistently told our attendees and the industry that we were going to produce Connect Marketplace 2020 regardless of any roadblocks. Our leadership was adamant that the show must go on. And we found a way.

We moved our 2020 event not once, but twice, to make that happen. The easier thing to do would have been to cancel our conference and go completely virtual. To bow out and just focus on 2021. We knew that. But we made a commitment to safely restart the meetings industry and we were going to keep that commitment. In October 2020, Connect was the first large U.S. meetings industry conference to happen since the pandemic began. Connect Travel followed soon after in November.

Connect promised our furloughed and out-of-work colleagues (who were counting on continuing education, networking to get back on their feet and

**We made a
commitment
to safely restart
the meetings
industry and
we were going
to keep that
commitment.**

getting meetings back on the books) that we would step out in front and do everything we could to deliver an event that would get our industry restarted. Hosting a live event meant revenue for the hotel, its employees (everyone from sales to valets to housekeeping), airlines, car rentals, the city itself and surrounding businesses who depend on tourism dollars. We kept that promise.

And you know what? Our industry embraced all the pivoting and joined us in relaunching meetings in America. We had 1,000 people attend in person and 175 virtually. Everyone from the front desk clerks to the valet to the housekeeping staff thanked our attendees for coming to the hotels and restarting business. The attendees themselves thanked Connect and Connect Travel staff for being there and getting them back out on the job.

Now, we're ready to take that same philosophy of the show must go on and dive into 2021. Safety will always be our No. 1 priority and we've learned so much.

We have many shows on the books right now for 2021 and we've got a fresh new vibe for all of them.

2021: CONNECT TRAVEL IS BACK.

(And it's gonna be **big**.)

Connect Travel's appointment-only reverse-style trade shows offer business, networking, education and entertainment. Each show attracts a unique set of attendees specific to that event, eliminating crossover at other Connect events.

Q2

April 21-22

Connect Travel Marketplace (Virtual)

May 24-26: Las Vegas—Red Rock Casino Resort & Spa

RTO Summit West + TOUR West

June 30-July 1: New York City—Grand Hyatt New York

RTO Summit East + TOUR East

Q3

Aug. 30-Sept. 1: Tampa, Florida

RTO Summit South

Sept. 18-19: Las Vegas—Resorts World

Connect THRIVE Summit

Sept. 20-22: Las Vegas—Resorts World

eTourism Summit

Sept. 20-22: Las Vegas—Las Vegas Convention Center

Connect TOUR National

Q4

Nov. 30-Dec. 1: Washington, D.C.

Active America China

Connect

WE'VE GOT A SHOW FOR THAT.

Save the date for these 2021 Connect Events.

Connect's appointment-only reverse-style trade shows offer business, networking, education and entertainment. Each show attracts a unique set of planners specific to that event, eliminating crossover at other Connect events.

Q1

February
CONNECT CYBER

February: Kamuela, HI
• Luxury Summit

Q2

May: Las Vegas
• BizBash*
• Corporate: Financial/
Technology/Pharma/
Insurance
• Diversity
• Diversity Sports
• Incentive
• West

Q3

Aug. 30-Sept. 1: Tampa, FL
CONNECT MARKETPLACE

- Association
- BizBash Live*
- Corporate
- Express
- Luxury
- Specialty
- Sports

Q4

Oct. 27-29: Round Rock, TX
• Faith
• Texas

Nov./Dec.: Washington, D.C.
• Association
• Medical | Tech
• Intermediaries

Hospitality is our business.

We will take care of you.

We want you to know unequivocally that your health and wellness is Connect and Connect Travel's No. 1 priority. Throughout our planning process and on-site, we work closely with hotel staff and medical professionals to keep you safe.

**We aim to cut down contact while still coming together.
Here are some of the safety measures employed by Connect at our events:**



Temperature checks
administered to attendees
prior to entry.



Masks required
and provided.



Hand sanitizer
is distributed.



Wider aisles
in the trade show.



Planners and suppliers
seated at either end
of a 6- or 8-ft table.



Disposable glove
stations on-site.



Boxed meals
distributed to attendees.

For more information, contact Sales@ConnectTravel.com.



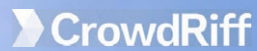
CORPORATE
PARTNER

ABOUT

CrowdRiff is the leading visual marketing platform used by 800 travel and hospitality brands to discover and deliver visuals that influence today's travelers.

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Vice President of Marketing
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The marketing tool for a post-COVID world has arrived.

The CrowdRiff Story Network enables state, province and country level destinations to standardize content creation, distribution and insights with their industry partners.

Learn more at crowdriff.com/story-network





PRINCIPLE
PARTNER

ABOUT

Cvent is a leading meetings, events, and hospitality technology provider with more than 4,300 employees, 27,000 customers, and 300,000 users worldwide. The Cvent Event Cloud offers software solutions to event planners and marketers for online event registration, venue selection, event management and marketing, onsite solutions, and attendee engagement. Cvent's suite of products automate and simplify the planning process to maximize the impact of events. The Cvent Hospitality Cloud partners with hotels and venues to help them drive group and corporate travel business. Hotels use the Cvent Hospitality Cloud's digital marketing tools and software solutions to win business through Cvent's sourcing platforms and to service their customers directly, efficiently and profitably - helping them grow and own their business. Cvent solutions optimize the entire event management value chain and have enabled clients around the world to manage millions of meetings and events. For more information, please visit Cvent.com, or connect with us on Facebook, Twitter or LinkedIn.

CONTACT

Cvent Sales

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sales@cvent.com

ABOUT

Destination Analysts is a travel and tourism market research firm based in San Francisco, California. We are a team of travel industry experts with extensive, hands-on experience working with some of the world's greatest tourism brands and Destination Marketing Organizations. We are widely known for our pioneering, customized travel and tourism research that is second to none for its reliability, affordability and transparency. We not only assist clients with the interpretation of their research results but the architecture and execution of strategy based on that research. Our travel studies, The State of the International Traveler™ and The State of the American Traveler™, are standards in the industry. We serve every type of Destination Marketing Organization and specialize in: Visitor Profiles, Economic Impact Analysis, Return on Investment Studies, Destination Brand Research, Website ROI, Social Media ROI, and Website Usability Research.

CONTACT

Erin Francis-Cummings

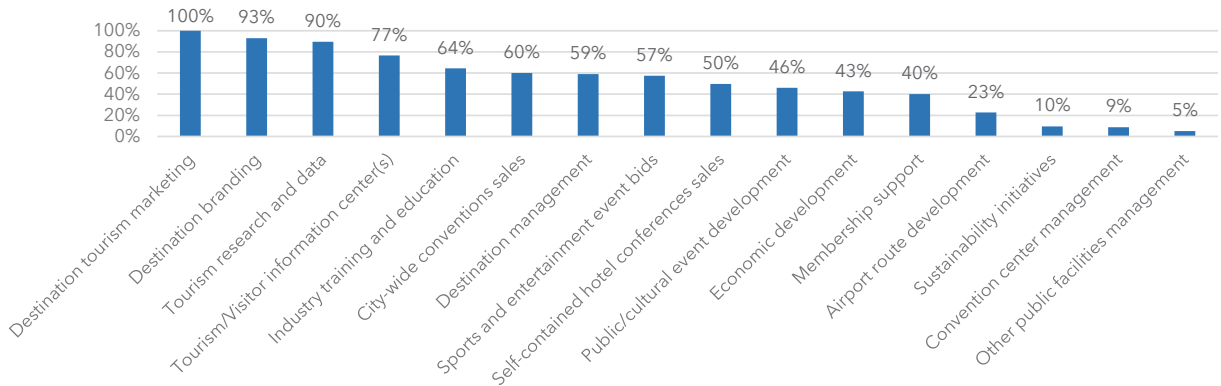
President & CEO

415.716.7983

erin@destinationanalysts.com

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 return of investment
- **Resident Research**—to track the awareness and support of the tourism industry's contribution to the local community

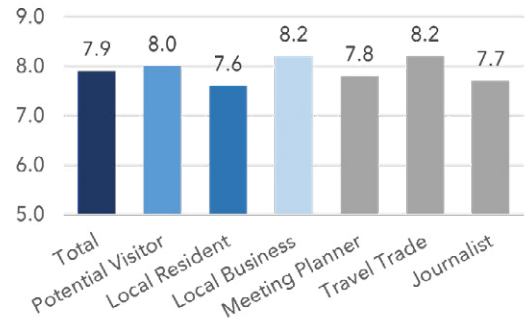
Destination Marketing Organizations: An Important and Valuable Resource to Many Audiences

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 research has highlighted that 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



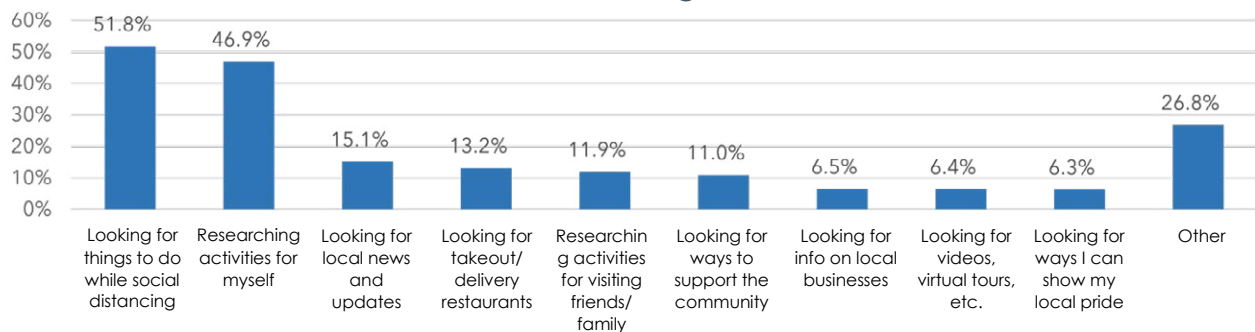
DMO Websites: An Engine for Economic Impact and Unparalleled Resource for Visitors During a Crisis

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.

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.

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



There were a number of things in travel—and thus destination marketing and management—that needed to evolve prior to the pandemic, which the COVID-19 crisis has only accelerated—from negative environmental perceptions to meeting customers desires for wellness. Based on our extensive traveler consumer research, here are key takeaways on how destination marketing and DMOs as organizations can meet and succeed at these.

Key Takeaways

- **Leverage existing and emerging tech-driven tools to evolve your strategies** to keep up with the ever-changing needs and desires of consumers.
- **Listen to your customers. Have them evaluate your digital and mobile brand strategy.** This feedback loop of information and data will allow your organization to better serve consumers and be more effective in converting them into actual customers.
- With growing environmental consciousness, **travelers will increasingly be seeking destinations that address, manage and communicate their environmental sustainability.**
- Americans see travel as a means to achieving their desired emotional states, and **marketers will be most successful in positioning how their destination experiences contribute to well-being.**
- **The marketing of a destination’s fresh and unique dining scene is particularly relevant now** as it can inspire travelers to get back out on the road again.

Destination Analysts Can Help You

- **Visitor & Target Audience Profiles**
- **Visitor Activity Analysis & Segmentation**
- **Brand Performance**
- **Audience/Persona Research**
- **Resident + Stakeholder Research**
- **Advertising Testing + Focus Groups**
- **Meetings & Events Planner Insights**

info@destinationanalysts.com





In the Fall of 2020, Destination Analysts conducted a survey of over 240 DMO executives about change and disruption in the tourism industry, commissioned by BVK, as part of their Destination Tailwind: A Strategy Series. The findings have important strategic implications for DMOs--from where to focus resources, to the skills that should be hired for in order for these organizations to stay competitive in this increasingly fast-moving world.

When we asked DMOs to describe their organizational purpose and mission with a single response, it's clear that DMOs see themselves as there to strengthen the local economy and quality of life, far more so than as existing for the purposes of destination promotion or as travel demand generators. But some sense is compelling 70% to agree that their organization needs to change or evolve their mission and purpose.

DMO executives see a need to change in important ways. Nearly all agreed--and 41% strongly--that their organization recognizes the need to transform in response to disruptive industry trends, including changing customer needs, technology, and on a vastly different side, local community and resident sentiment. In fact, in part to this, DMO executives agree the ways they need to change are significant. There is strong agreement across the DMO industry that their organizations need to change or evolve their funding model and even change or evolve their core offerings.

DMO executives are challenged with how to create an internal culture prepared for change with the funding and resources they currently have, as well as grapple with the inevitable external forces that impact their ability to adapt and change, even when the internal structure is there. 25% say that new concepts, products and ideas at their organization often or always get LESS attention than they should because key constituents tend to favor the way things have always been done. 61% say this sometimes happens--only 11% never. Many DMO executives cited getting internal buy-in and a lack of compelling ideas as obstacles to their ability to transform. Clearly, they need people on their teams that are skilled at obtaining resources and inspiring internal buy-in.

Competitive pressure is intensifying and coming from all angles--56% of DMOs believe the competitive intensity they feel now will only increase moving forward. Just within the next year, almost 70% say they expect increased competition just within their own industry, and 61% anticipate increased competition from adjacent industries, such as technology or travel influencers. Over half of DMOs say they anticipate competition for their services and offerings from entirely new industries, and over a third even anticipate competition for their services from organizations within their own communities. As DMO executives look out over the next five years, a majority of them feel they will face increased competition for the very core services these organizations are likely most currently known and valued for, including Destination Branding, Product/Experience Development, Tourism Marketing, Visitor Information, Economic Development.

A "working together" ethos may thus be more critical than ever.

ABOUT

Two former DMO professionals have taken their unique experience working for CVBs on both the sales and marketing side to create an agency specializing in meetings marketing for destinations. We ONLY work with DMOs. We're brick and mortared in The Sunshine State, one of the fastest growing companies in Jacksonville and on the Inc. 5000 list of fastest growing companies in the US. With 100+ combined years of DMO and hotel sales and marketing experience under our belts, we develop marketing solutions for some of the coolest destinations in the country; however, you won't find a behemoth of an agency here.

CONTACT

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Co-Founder

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We Work Closely with Trade Publishers and Associations

- Northstar
- MPI
- PCMA
- ASAE
- Connect
- Smart Meetings
- Meetings Today
- Association Forum
- Mountain Meetings
- Midwest Meetings
- Meetings Database Institute
- Skift
- Cvent
- HelmsBriscoe
- ConferenceDirect
- Experient



Group Sales Services

You Won't Find Anywhere Else. We Bridge

the Gap Between Marketing & Sales.

Sales Services

- Sales Activity Email Marketing
- Third Party Partnership Management
- Mid-West & Mid-Atlantic Client Event Coordination
- Destination Experiential Programs A.K.A. FAMs
- Focus Groups
- Client Database Evaluation
- Growth Markets and Persona Development
- Sales Reports Evaluation

Marketing Services

- Digital Media
- Media Management
- Traditional & Digital Creative
- Content Marketing
- Email Marketing
- Social Media
- Website Audit & Strategy
- Video & 360
- Attribution & Reporting

Our Leaders



Shirley Smith
Co-Founder



Mya Surrency
Co-Founder



Mae Demdam
VP of Marketing Strategy



Kim Ritten
VP of Business Relations

Client Family



The Reality

Percent of Planning Possibilities

A common action that the meetings & conventions industry has been clinging onto amidst the COVID-19 pandemic is *surveying*.



79%

79% of planners are choosing dates beginning in 2021, while only 10% will wait until 2022 or beyond.

(Northstar Meetings Group Pulse Survey: 6.15.20)

60% of Americans view outdoor activities safe which can drive attendance to a destination that offers open-air opportunities for groups.

60%



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www.DigitalEdge.Marketing

The Pivot

Think Creatively, Shift & Adapt

Outside the box

In order to do business during an ever-changing time of uncertainty, DMOs had to think outside the box for a meetings marketing strategy to keep their destination top of mind.

×



The Heroes

Hybrid/Virtual is the Path Forward

DMOs took notice of the hybrid & virtual events (those with in-person & virtual components) solution for getting back to safely meeting—adapting for the **nearly 80%** of planners expecting an increased need for virtual event platforms.

The Change

Standards of Safety & Health

Safety is the #1 priority. DMOs, planners & hospitality partners must collaborate on plans for upholding the enhanced standards of convention services moving forward.

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The Recovery

Paving the Way on the Road Ahead

To help bring live meetings back, DMOs can utilize meetings marketing, launch virtual destination experiences (FAMs), collaborate with hospitality partners & communicate with planners.



The Next Normal

The Day We Meet Again

With enhanced safety & health protocols being implemented, in-person meetings & events will begin to resume—with **nearly 3 in 4 events** requiring & supplying face masks (*Northstar Meetings Group Pulse Survey, 7.15.20*), increased signage & new room configurations for planners.

**nearly
3 in 4
events**

digitaledge

www.DigitalEdge.Marketing



ABOUT

Expedia Group Media Solutions builds innovative media partnerships for travel advertisers, leveraging Expedia Group's network of travel brands and global sites. With a growing portfolio of advertising and sponsorship opportunities and nearly a decade helping our partners in times of crisis, Expedia Group Media Solutions has revolutionized how brands reach and connect with online travel consumers.

CONTACT

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*Senior Director, Business
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A New View on Leisure Travel in the Time of COVID-19

By Monya Mandich



We are big believers in data and know that insights into traveler decisions and motivations are more critical for our advertising partners than ever before. Our media experts regularly harness billions of travel intent and booking data points to help our advertising partners connect with highly engaged travel shoppers across Expedia Group brands around the globe, including Expedia.com, Hotels.com, Vrbo, Wotif and many more. As the industry continues to combat the impacts of COVID-19, this ability to understand traveler intent and purchases, in real time, has never been more crucial.

To help our advertising partners understand continually shifting travel shopper behaviors, we combine our exclusive Expedia Group data of what travelers are searching for and booking on our brands globally with the latest insights on *the why* behind these decisions from our user research team and custom industry studies.

Given how quickly the landscape is changing in the current crisis, we conducted a Traveler Sentiment Study in July with research experts dscout. We asked a panel of travelers in the U.S. as well as in Australia, Canada, France, Germany and the U.K. to tell us about their upcoming travel plans and explain what is driving their decisions when it comes to booking trips at this time. Respondents to the online survey were qualified as already having had a leisure trip planned and/or booked for

June-December 2020. As well as detailed study responses to a number of questions, we were also able to see and hear from travelers through online video testimonials, helping uncover deeper insight into their attitudes and motivations.

Health And Hygiene Information Is Key

As travel shoppers evaluate their destination, accommodation, and transportation options, around 9 in 10 of them want to see information on health and cleanliness before booking. Above all else, travelers want to be reassured that it is safe for them to travel and they want to see relevant information and messaging from travel brands. We recommend that destinations, lodging and transportation advertising partners use marketing messages and content to explicitly outline the health measures they are taking.

Domestic Car Trips are Trending

With only 26% of travelers comfortable traveling by plane this summer, destinations should target drive markets to attract potential visitors. Proactively sharing information on open businesses, off-the-beaten-path activities, socially distanced experiences, and more will help would-be visitors get inspired and plan their trip. The likelihood of visitors renting a car for a leisure trip is three times higher than pre-COVID levels, representing a huge opportunity for rental companies.

Expedia Group™ Media Solutions

Top Considerations When Choosing A Destination:



9 in 10

Travelers will make decisions based on health and hygiene protocols within a destination



86%

Activities and experiences open for business



80%

Ability to travel via preferred mode of transportation

Planned Leisure Trips:



3X Higher

Likelihood to rent a car for a leisure trip 3X higher than pre-COVID levels



62%

Traveling by car



76%

Of planned trips are domestic



2/3

Traveling under 1000 miles



53%

Traveling by plane

Top Accommodation Considerations:



31%

Travelers are most comfortable staying in a **Vacation Rental**

28%

Chain hotels

15%

Resorts



9 in 10

Travelers would use an Online Travel Agency (OTA) to book their trip

Top Trip Types:



28%

Family leisure trips



29%

Visiting friends or relatives



15%

Romantic trip

Vacation Rentals Prove Popular

- Travelers are most comfortable staying in a vacation rental—chain hotels and resorts come in a close second during the COVID-19 crisis. Lodging providers can attract potential guests by leading with their flexible cancellation policies and detailed health and safety information. Hotels and resorts can also share information on nearby activities that are open for business and incorporate special deals to help make the booking decision even easier.

Travelers Turning To OTAs Throughout The Purchase Journey

- Along with insights into destination, accommodation, and travel preferences, the research shows travelers are turning to a variety of resources for trip inspiration, planning, and booking right now, including online travel agencies (OTAs). Nearly half of respondents turn to an OTA for inspiration, 73% for planning and 93% would use an OTA to book travel in this environment, illustrating an opportunity for travel brands to drive awareness and demand with a highly qualified audience.

The findings from this study, combined with our Expedia Group data, provides us with current insights into how travelers are thinking about travel in the time of COVID-19.

► **For more information, go to:**

<https://info.advertising.expedia.com/traveler-sentiment-study>

A New View on Leisure Travel in the Time of COVID-19

It's insights like these will ultimately help our partners navigate this rapidly changing landscape and ensure that all planned marketing activity hits the right travelers, with the right messages, when the time is right. We believe that by learning more about what is driving travel decisions, we can boost recovery efforts and get travelers traveling again.

Want to understand more about current traveler motivation? Get more insights into what is influencing travelers in the time of COVID-19 by listening to our on-demand webinar series.

► **For more information, go to:**

<https://info.advertising.expedia.com/webinars-covid-19>

Data collection method: qualitative online survey (July 14-20, 2020), conducted by dscout, a leading qualitative research platform
Sample size: 141 respondents from the U.S., Canada, Europe, UK and Australia
Qualified survey respondents must have had a leisure trip already planned/booked for June 2020-December 2020

expedia group™
media solutions

Expedia Group Media Solutions is dedicated to building innovative media partnerships for travel advertisers enabling them to leverage Expedia Group's network of leading travel brands and global sites. Expedia Group Media Solutions has revolutionized the way brands reach and connect with online travel consumers, emerging as a thought leader in online advertising sales among travel and e-commerce brands. With a growing product portfolio offering a multitude of advertising and sponsorship opportunities, Expedia Group Media Solutions has created a viable marketing platform for advertising partners to reach the 144+ million worldwide monthly unique visitors that visit Expedia Group sites.

For more information, visit

www.advertising.expedia.com.



PREMIER
PARTNER

ABOUT

Fired-Up! Culture has partnered with organizations and leaders around the globe to build business cultures that engage people and achieve breakthrough results. Our data-driven solutions assess, equip and build resilience and leadership capacity through talent management-focused consulting services.

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EVP, Principal

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A Comprehensive Guide to **Leading Through Difficult Times**



At the end of 2019, the economy was wrapping up one of its best years on record.

According to The Pew Charitable Trusts, every state reported economic gains in the months before the pandemic hit. But things have changed dramatically since then.

Since the COVID-19 pandemic the global impact has been staggering. In the United States, 43% of small businesses closed their doors. Some were temporary. Some became permanent. Those that remained open reduced their employment by 39%, on average. In a period of just two months, 36.5 million Americans lost their jobs. Numbers like this haven't been seen since the Great Depression.

Being prepared is a hallmark trait of all great leaders, but many have been left to wonder how they could have ever prepared for what happened in 2020. And, as things continue to evolve, it's all too easy for leaders to simply react, instead of thinking strategically about their next steps.

Even though this year has been extremely unique, leading through crisis is an inevitability. Knowing how to prepare for a crisis and adapt to it in the moment is a critical skill for great leaders. And this has never been clearer than in 2020. This guide is dedicated to solving those challenges.

CONTENTS

Your team depends on your leadership in times of crisis. In this white paper, we'll show you how to take action, prepare for rough roads, and see opportunities through uncertainty.

Why True Leadership Shows up When the Heat Is On

How to Become a True Leader in Times of Crisis

Developing Empathy for Employees

Making the Most of an Unforeseen Situation

Connect with Fired Up
www.firedupculture.com
(855) 9-FIREUP



Why True Leadership Shows Up When The Heat Is On



We always tell our clients that true leadership shows when the heat is on. It's easy to say and do the right things when everything is going well – when money is coming in, customers are happy, and the future looks bright.

But when things get rough, sticking to the right path isn't so simple. Crisis forces leaders to make difficult decisions that reflect their true values. When that happens, great leaders are calm, thoughtful, and invested in personal relationships.

Going to the Pressure Going to the pressure is a reminder to regularly examine the challenges that exist within your organization. It allows you to handle issues from the beginning – before they have time to manifest into a real danger to your organization. There is no way to “outrun” issues. Things don't magically just go away. Successful leaders take time to regularly assess problems and challenges and take action.

Challenges Blocking Leaders from Their Best When great leaders stumble in crisis, it's often because they are too willing to focus on the day-to-day tasks when they should establish boundaries, delegate tasks, and look to the future. Two of their biggest roadblocks are an inability to zoom out and avoid management tasks.

How to Become a True Leader in Times of Crisis

During a crisis, everyone's attention turns to leadership to offer solutions and a path forward. But that doesn't mean you only need to rise to the occasion in difficult times. Truly great leadership is always being developed and improved upon. Crisis amplifies that development by calling on you to go to the pressure now, even when now is a chaotic environment. Why? Because chaos offers opportunities to those who are prepared and forces the unprepared to crumble.

In times of crisis, poor leaders will: 1) Blame others 2) Point fingers 3) Avoid decisions 4) Give up

You must clearly acknowledge the issues at hand, assess the situation, and address each challenge head-on.

People often think leaders are naturally gifted, charismatic, and gregarious. True leaders do often have those personality traits, but more importantly, they combine it with:

- An ability to create a vision and organize a plan to move forward.
- Demonstrated compassion, kindness, and empathy for people at all levels of the organization.
- Selflessness and a dedication to working through issues and celebrating wins as a team.

Core Elements of Great Leadership



Speak the Truth – By receiving accurate information from you as their leader, especially in a challenging time, your team's trust in you will grow.



Give Hope – Express a commitment to working on and developing a solution for addressing the current crisis



Listen to Hear & Involve – Being willing to listen shows caring and support for those affected.



Chart a New Course – Leaders who show the way forward will make the best of the situation and maintain the respect of those they lead.



Serve & Shine – When leaders serve and shine by speaking the truth, giving hope, listening and showing the way forward, they become a figure to whom teams have a deep commitment.

“Leadership is delivering inspiration through clear vision, authenticity, inclusion, and understanding. Those we lead must be grounded in the confidence that we are right alongside them on this journey.”

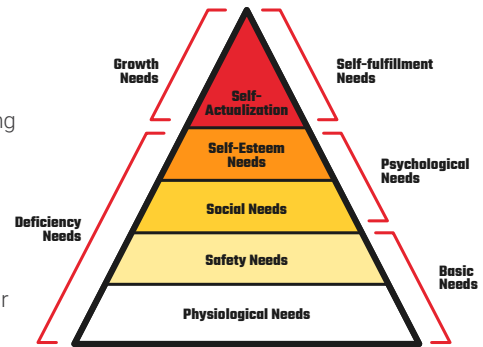
– Tammy Blount-Canavan, EVP & Principal, Fired Up Culture



Maslow's Hierarchy of Needs

Turning these core elements into direct action requires an understanding that the manner in which team members will behave and perform when things are humming along will likely be quite different when challenging times arrive.

For example, Maslow's Hierarchy of Needs tells us that in times of stress and challenge, leadership must express a message of caring and kindness. People are scared, uncertain, and frustrated. They need their basic needs met. Taking time to listen to concerns and empathize will help both you and your team members deal more effectively with the realities of the crisis. Connecting with teams to calm their anxieties makes it easier to deliver difficult messages when the time comes.



Practical Tips for Improving Leadership Skills During Crisis



1 Focus on Positive Relationships – approach things with a positive, empathetic, and supportive attitude.



3 Extend Grace to Your Employees – Extend abundant grace to employees so they feel trusted and supported.



2 Acknowledge the Harm – Recognize that things are hard in order to begin rebuilding trust with your teams.



4 Practice Mindful Leadership – Adopt an open mind and reserve judgment until you have all relevant information.

Developing Empathy for Employees

Leaders do not treat empathy as a tool to break out when crisis occurs. Rather, it is an integral part of the way they interact with others.

How to Express Empathy During a Crisis

Empathy encompasses the day-to-day investment you make in the well-being of your team members. Through empathy, you can rise to the challenge, be clear and kind in your words, speak the truth, and prove yourself as an exceptional leader.

When hard times come, leaders express empathy by...



Letting the Numbers Wait There's no question your bottom line will suffer in a crisis, but your real investment is in your team, not your product or your service. Communicate empathetically before you tackle the hard numbers.



Showing Heart Early & Often In a crisis like COVID-19, the focus cannot be on profits and margins. When the health and well-being of your team members and families are at stake, you must show compassion, sympathy, and caring. Combat uncertainty with support and fear with hope.



Getting a Second Pair of Eyes Crisis breeds sensitivity. Ensure your communications are well-received by reviewing them with trusted colleagues.

Empathy is not just when things are tough. Empathy is seeing someone's potential and helping them go further. It is not just an expression but a genuine demonstration of awareness and love."

— Tim Yeomans, Executive Vice President at FiredUp!

Using Empathy to Tackle Underperformance

In stressful circumstances, it's understandable for your team members to lose focus, become disorganized, and lack direction.

Your job as an effective leader is to use empathy to open direct, transparent communication with your teams and establish clear norms and values that dictate how they spend their time.

- Drives engagement by providing people with clear expectations, meaningful work, and accountability.
- Creates a sense of shared ownership that engages individuals to work as a team toward unified outcomes.
- Allows for flexibility, so leaders and teams can adapt to suit the unique needs, concerns, and opportunities of the existing crisis.



Making the Most of an Unforeseen Situation

No matter how prepared you are, a true crisis is inevitable. What you make of it as a leader is the real test.

In crisis, systems can improve, Team capacity can flourish, And creativity can ignite bigger, bolder ideas than ever before. In every crisis, you have two options. You can react, blame others, and isolate, or you can take charge, go to the pressure, exhibit empathy, and move forward in a new direction. Crisis offers a chance for cultural metamorphosis. Leaders need only trust in the process, remember their core values, and embrace the change. When leaders view crisis as a chance for cultural metamorphosis, anything is possible.

Recognize the Opportunity to Improve

Crisis is a time to return to your organization's core values and long-term plans.

A few examples of crisis-specific opportunities include...

- **Improve Internal Capacity** – When the horizon for your business is obscured by factors that feel out of your control, looking inward for improvement and efficiency can be a rewarding direction to focus your energy as a leader.
- **Make It a Team Effort** – Enlisting the help of team members to improve internal capacity builds inclusion, improves a sense of ownership, and focuses the efforts of teams so they're more engaged and efficient.

As a leader, once you recognize you are in a crisis, ask yourself these questions...

- Are we honest with people about it?
- Have we done everything we can to research it and understand what the dynamics are?
- Have we thought about how the current crisis impacts with the planning we've already done?
- How can we modify our 30-, 60-, 90-day plans to support our team?



Become a Master Communicator

Uncertainty is a breeding ground for speculation, rumor, and gossip. Leaders who do not make an early commitment to clearly communicate in the face of crisis risk alienating their organization and losing trust.

Consider these communication strategies whenever you face a crisis...

- Make your message heard by utilizing all communication channels (email, print, in-person meetings, etc.) to their full potential.
- Prevent gossip by communicating early and often.
- Get the details right, avoid speculation, and be honest about what you may not know.
- Focus on the future and how you see opportunities to improve in the midst of difficulty.

Many of these conversations will not be easy, but they're necessary. And, there is a way to have them that will soften the edge. Always begin and end a difficult conversation on a positive note.



Turn Difficult Conversations into Positive Practices: Lessons From COVID-19

When the coronavirus first turned most office spaces into ghost towns, it was hard to think about the benefits. But remember, a crisis can create as many opportunities as it takes away. Here are a few COVID-inspired practices that actually improved the way many organizations function.

- **Committing to Positive Relationships** – When the health and well-being of teams was threatened, coworkers became confidantes, collaborators, and friends sticking together through the bond of difficult shared experiences.
- **Fostering Flexible Work** – We've known for a long time that flexible work schedules are valued by employees. COVID proved it was possible, paving the way for a better work-life balance and lower overhead costs in the future.
- **Offering Abundant Grace** – Organizations that couldn't be together found new ways to connect, extended each other empathy, and moved forward united in new and inspiring ways.

Connect with us to get the support you need to lead your team and organization well. www.firedupculture.com • (855) 9-FIREUP

ABOUT

Greenberg Traurig is a full-service law firm with extensive experience in hospitality and the travel & tourism industry. The firm has geographic reach of 41 offices and 2100 attorneys globally, but our approach has always been “local” and “on the ground.”

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GT GreenbergTraurig

Travel, Tourism, Hospitality

YOUR ONE-STOP 'DESTINATION' LAW FIRM



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Bryan counsels corporate clients, trade associations, destination marketing organizations, and public-private partnerships (P3) providing industry-specific, cost effective, outside counsel services, operational consulting, and advocacy. Drawing from his nearly 15 years as COO & General Counsel at NYC & Company, Inc, New York City's official marketing, tourism, and partnership organization, Bryan lead the organization on legal, business development, sponsorship, licensing, government relations, regulatory, and policy matters.

Bryan provides strategic counsel and advises clients on matters that advance an organization's mission, while growing and protecting its funding streams. Bryan has developed a reputation as a go-to problem solver for his clients as well as with businesses experiencing legal and policy troubles with their stakeholders. He is known for his work in the travel & tourism industry, government relations, not-for-profit management and public/private partnerships. With a deep knowledge of politics and the ability to navigate complex issues in dynamic environments, Bryan provides clients a unique perspective on how to deftly handle government relations, and bridge the gap between business goals and legal issues, while providing value to stakeholders.

Having served three mayors of New York City, Bryan has deep government experience, credibility, and broad knowledge of the private sector, including sports leagues, marketing firms and industry associations, particularly in relation to the travel, tourism, and hospitality industries. He draws on his wide-ranging understanding of policy issues and the regulatory schemes of cities, states, and the federal government to represent clients in policy initiatives and transactions. Bryan previously served as general counsel in the Mayor's Office of International Affairs, where he provided legal counsel and support to city agencies and senior administration officials in dealings with the United Nations, foreign governments, diplomats, and federal agencies.

Greenberg Traurig Hospitality Practice at a Glance

Greenberg Traurig's Hospitality Practice sits at an intersection with the firm's Government, Law and Policy Group. The multidisciplinary capabilities of Greenberg Traurig allows us to not only deal with critical issues but also day to day operational issues and large-scale projects.

We counsel clients on revenue diversification opportunities, industry-best governance practices, community engagement, advocacy/traditional lobbying, negotiation and deal making and unique transactional matters and the contracts to implement them. The Hospitality Practice also works closely with other groups at Greenberg Traurig including the Sports Group, Land Use, Real Estate, Labor & Employment and Franchise practices. This provides a "one-stop shop" for our hospitality clients while ensuring attorney-client privileges and lower legal costs that are competitive in the local jurisdiction in which our clients are located.

Working hand-in-hand with our Government Law & Policy Team we represent clients in legislative, regulatory and procurement matters at various levels of government. CEOs of *Fortune* 500 companies, leaders of civic associations and important non-profit organizations regularly turn to us for legal counsel and ability to assist their organizations to pursue their business goals through legislative means. We serve corporate and civic organizations as well as a wide variety of other clients.

Experienced Government Relations Professionals

Greenberg Traurig has a unique practice – a team with seasoned lawyers and lobbyists who have real government experience. These capabilities are more relevant than ever for today's challenging environment as we help clients address the Coronavirus Disease 2019 (COVID-19) health crisis, and even more importantly, help them navigate issues and opportunities once the crisis has subsided.

Over the last year, the GLP team has added experienced personnel and capabilities that include lawyers with multidisciplinary economic development and government relations experience. Currently, the GLP team is helping clients deal with their new unique challenges – governmental, financial, and otherwise.

GT's Value Proposition

At GT, we take pride in a collaborative atmosphere, including engaging with colleagues in matters which result in creative counsel and advocacy before government and its agencies. The GLP team, is supported by and working with our multidisciplinary lobbying and legal teams in the firm's offices around the country to provide multifaceted counsel for our clients' needs. In addition to the depth of our GLP team, GT has a [Health Emergency Preparedness Task Force: Coronavirus Disease 2019](#). Members of the Task Force are monitoring actions anticipated or being taken by state and local government closely and have written many alerts on the issues that may impact municipalities and businesses in a wide-range of industries. We update the site in real time and you will find those insights on the [GT website](#). Our GLP team is also following up with clients in real time as these decisions are being made, and updating clients on Executive Orders, proposed legislation, and regulatory action that may affect their businesses.

We create tailored strategies for clients experiencing legal and policy obstacles with their local government. Each member of the team has broad experience in government, law, and policy, as well as in the hospitality sector, travel and tourism industry, and not-for-profits.

Below is a list of the types of issues we anticipate in areas where we may be helpful to you. All lawyers on the GLP team are also registered as lobbyists, affording clients the ability to combine services, for an economical approach to their needs.

- Small Business Relief under the CARES Act
- Budget & Funding
- State Budget
- Municipal Budget Process
- Lobbying
- Regulatory - Employment & Related Issues / Tax Credits / Other Relief
- Ethics and disclosure laws
- Government Contracts, Economic Benefits, or other government relief programs
- Political Law & Compliance

Greenberg Traurig At a Glance

Greenberg Traurig is a full-service law firm with extensive experience in a wide-range of industries and a geographic reach of 41 offices and 2100 attorneys globally, but our approach has always been “local” and “on the ground.”

Greenberg Traurig – U.S. Locations



Alternative Fee Arrangements

At GT, we understand our clients’ businesses and offer them a highly entrepreneurial approach to legal counsel. Our multidisciplinary team includes senior lawyers who have served as chief legal officers at major multinational companies and have spent years solving real-world problems in the business, political and legal environments of major commercial centers. We also recognize that clients expect and are entitled to high quality legal work and, equally important, superior client service. Accordingly, we strive to provide our clients with the highest quality legal work and service at a reasonable cost.

We have developed fee arrangements for every budget need, and can assist clients in fostering a level of predictability in an engagement, while creating a baseline for forecasting. These approaches can range from the utilization of fixed fees for handling a portfolio of routine matters as “on-call” outside counsel or for a fixed duration to address specific needs such as review and republishing of employment policies or adapting modern governance practices to discounted hourly rates for specific, limited assignments.

For more complex matters, an engagement may be broken into phases each with its own fixed fee. Typical matters would include complex commercial litigation and large real estate or corporate transactions.

For consistent, recurring matters, typically within a legal specialty, a fixed fee per matter or retainer may be charged to handle a specific volume of matters annually. Examples include routine employment litigation and charges; patent, trademark and copyright prosecution; visa applications; etc.

A Multidisciplinary Firm

- Banking & Financial Services
- Blockchain
- Corporate
- Data Privacy & Cybersecurity
- Emerging Technology
- Energy & Natural Resources
- Entertainment & Media
- Environmental
- Food, Beverage & Agribusiness
- Franchise & Distribution
- Gaming
- Government Contracts
- Government Law & Policy
- Health Care & FDA
- Hospitality
- Immigration & Compliance
- Infrastructure
- Insurance
- Intellectual Property & Technology
- International Trade
- Labor & Employment
- Latin America Practice
- Life Sciences & Medical
- Technology
- Litigation
- Marketing, Advertising, Sweepstakes & Promotions
- Law
- Pharmaceutical, Medical Device & Health Care
- Private Wealth Services
- Public Finance & Infrastructure
- Real Estate
- Regulatory & Compliance
- Restructuring & Bankruptcy
- Retail
- Tax
- Technology, Media & Telecommunications
- Transportation & Automotive



PREMIER
PARTNER

ABOUT

Proud of its roots in Brighton, UK, the IMEX Group owns and operates two market-leading, annual trade shows for the meetings, events and incentive travel market globally: IMEX in Frankfurt and IMEX America. These shows have grown into extraordinary events that showcase the changing landscape of the business events industry around the world. Innovation, discovery, exploration, transformation, oh—and strong business value—are all on the menu, and every year that menu evolves to reflect a rapidly transforming global marketplace with new players, new technologies, new bends and new trends.

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ABOUT

JLL's Tourism & Destination Advisors are industry pros who have walked in your shoes. We use our practitioner lens as former CVB executives, convention center operators, destination marketers and hoteliers to deliver customized solutions to our clients across all their destination needs. JLL's Tourism & Destination Advisory practice specializes in representing the DMO and adding value to the public sector's investment in this important sector of the global economy. We have delivered customized solutions for more than 100 destinations, cities, regions, states and countries—partnering to attract visitors, convention delegates, improve the overall tourism landscape and ultimately make our clients' destinations more competitive. Our Global Tourism & Destination Advisors offer market research and tourism development services to clients to increase value through strategic and master planning efforts including asset development and public investment. Our clients represent some of the most extraordinary and iconic destinations in the world as well as the extraordinary destinations yet to be discovered. We judge our success on how well our work supports and transforms destinations of the future. As a consultancy practice within JLL, we are able to leverage the power of JLL's Fortune 500 professional services and investment management expertise. This includes supporting public private partnerships, leveraging our capital markets division, sourcing foreign investment, driving tourism asset development and fueling tourism economies to create jobs, increase income and improve their quality of place.

CONTACT

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Tourism & Destination

Advisory

Providing strategic advice to maximize
your destination's potential

Winter 2020



*Achieve
Ambitions*

We know destinations

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Achievements

A detailed look at our practice's 25+ year track record in supporting destinations, identifying needs, stimulating growth and measuring success in tourism economies:

100+ convention & conference center studies

50 tourism and destination strategic planning clients

30 entertainment and sports venue asset clients

35 multi-jurisdictional destination plans

22 public-private hotel development & advisory projects

20 governance and model restructuring efforts

Track record

JLL provides a full range of destination development and strategic direction services for both public and private clients seeking to maximize tourism results. Our team has the breadth and depth of practical experience to lead a full range of advisory services for the destinations we serve. A sample of our past client connections include:

Destination Strategic Planning & Destination Development Strategy



Destination Governance & Structural Models



The JLL clients above provide a small glimpse of our past range of destination service.

Team



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ABOUT

For over 40-years Longwoods International has served the industry as a leading tourism market research partner that helps clients meet their objectives through our exceptional team, groundbreaking research leveraging new technologies, strategic partnerships with organizations like the Travel and Tourism Research Association (TTRA), thought-leadership and excellent counsel and service. As a market research consultancy, Longwoods provides clients comprehensive solutions, working with major multinational firms to collect the highest quality data, and then apply our expertise to move beyond numbers to strategic insight that helps guide clients' marketplace success. Longwoods is known for a multitude of destination marketing services, especially: Overnight and day visitor profiles, including visitor volumes and expenditures, through Travel USA®, the largest American domestic travel study, begun in 1990; Destination advertising awareness, return-on-investment on advertising campaigns, and measuring the impact of advertising on a destination's overall image as a leisure trip across over 40 specific attributes; "Halo Effect" of destination advertising on the wider field of economic development; Resident sentiment research, which investigates both practical and emerging/growing concerns among residents in a destination, including topics such as economic development, perceived environmental impacts, overtourism, and quality of life; and Custom qualitative and quantitative research.

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Evolving KPIs For a Carefully Planned Recovery

The COVID-19 pandemic has drastically disrupted the travel and tourism industry since March 2020. These unprecedented times has forced the industry to create innovative solutions for reopening and rethink how it measures itself. During this time Longwoods International collaborated with the industry to identify new ways of measurement and define those KPIs that are essential for a safe and sustainable reopening.

The pandemic and subsequent phased reopening of the industry has resulted in a travel market that looks vastly different from before: travel markets have shifted, with the resident being the first traveler to a destination and a central component of reopening plans; and the considerations that go into travel planning have expanded to include vital factors like perceptions of the health and safety of a destination, mode of transportation or accommodations. Reopenings may look different across the country, but the industry is in agreement that travel will be different and take through 2023 to recover 2019 peak demands.

To develop a successful reopening, DMOs need to focus on three key areas of insights: understanding their traveler, resident sentiment, and the ROI of the organization's initiatives. The travel marketplace is guaranteed to be different from what a destination has understood to be true before, and with the evolving nature of the travel environment, it is imperative that organizations keep a pulse on these factors throughout the reopening to be successfully poised for recovery.

Traveler

At the peak of the pandemic and the country's shut down, 85% of Americans were changing their travel plans due to COVID-19, according to the Longwoods International/ Miles Partnership ongoing Travel Sentiment Study. While this number has decreased slightly over time, as an industry we are facing a domestic travel market where the majority of people are changing their travel plans. Coupled with shifts in school dates and changes in the activities travelers plan to engage in this summer, the market fundamentally has changed.

2020 will be the year of the road trip with 29% of Americans changing their travel destination to one to which they can drive. In addition to shifting destinations, Americans are increasingly planning on spending time outdoors with top activities ranging from going to parks, hiking and enjoying the water. While travel plans and activities are changing, one thing has remained constant since destinations began lifting shelter-in-place restrictions -- Americans plan to travel in the next six months, with the percentage planning to do so hovering around 65% throughout the Fall.

DMOs can be assured Americans will travel this year, and with restrictions being eased, it is time to shift focus to the early indicators of travelers returning to destinations. Taking the next step beyond evaluating travel intent and measuring trends of travel returning to a market, DMOs can keep an early pulse on the resiliency of their market as well as how their travelers are or are not the same from pre-pandemic times. These insights can keep a DMO agile with the programs and promotions designed to help their community recovery.

Resident Sentiment

Residents are at the core of a local travel industry, being the face of a destination and the partners for a DMO. The knowledge of how residents feel toward travel and the DMO itself is vital for a DMO's success. At no time has the value of the travel industry to local communities been seen so prominently, and this has created an opportunity for DMOs to engage with their residents and partners together to welcome travel back.

The pandemic and the processes around reopening are a delicate topic across communities. To have a meaningful partnership with residents, a DMO must understand how their residents fall along the spectrum of being ready to engage with their local establishments and welcome travelers into their communities. Prepared with this information, a DMO can create programs and promotional initiatives that engage local residents and create positive partnerships across communities.

The ever-evolving nature of the pandemic guarantees that how a community perceives reopening and the welcoming of travelers from outside their community will shift over time. While a benchmark is important to establish in the early days of the summer travel season, the ongoing exercise of understanding residents is essential to continuously keep a pulse. Visit www.longwoods-intl.com to view the latest National Resident Sentiment Study.

ROI

Historically DMOs have closely tracked the return on investment for their organization's use of tax dollars, and their ability to improve the image of their destination. Now more than ever, this is a vital evaluation as the travel market has undergone considerable transformation, and the impact of DMO advertising will, for most, differ from prior years.

Consumer demand, channel engagement, and factors influencing travel decision making have all shifted, making a reevaluation of advertising programs vital to both show value of the DMO to stakeholders and to enable a DMO to be a proactive marketer. With half of Americans saying concerns over COVID-19 will greatly impact their travel plans according to the latest Longwoods Traveler Sentiment Study, perceptions of safety, feeling welcome, ease of travel and familiarity are all hot-button attributes that DMOs must ensure they are moving the needle for their destination.

Coupling intelligence to meaningfully engage travelers with destination messaging with an understanding of the investment needed to drive incremental travel, DMOs can both be personalized and effective with their marketing initiatives to support their destination re-opening and community wide economy.

An evaluation of both the ROI and the image of a destination post-pandemic informs a strategy that is tailored to the new travel market and demonstrates the value of the DMO to their local community.

For more information contact Longwoods International at: info@longwoods-intl.com

ABOUT

We align top consumer brands with destinations and travel suppliers to increase visibility, deepen brand loyalty, build excitement and grow market share.



ABOUT

Miles Partnership markets destinations and hospitality businesses by working with state tourism offices, convention and visitors bureaus, hotels and other organizations in the tourism industry to create forward-thinking digital and print content marketing solutions.

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DMOs Leading in Supporting Locals

When you think of favorite spots in any destination, how many of those are local businesses? These shops, restaurants and hotels—and the people who keep them up and running—capture visitors’ hearts, giving destinations flavor, character and a reason to return. In the face of extraordinary challenges for local communities, Destination Marketing Organizations have been uniquely called this year to bring the focus inward to their hometown people and places.

Read on to learn how four DMOs have led the way in supporting the businesses, communities and neighbors that color their destinations and make them hum.

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Chattanooga Tourism Company: Building Connections

Challenge: A focus on local community is a key pillar of Chattanooga Tourism Company’s brand identity, so when their city began to feel the effects of COVID-19, the DMO focused communications almost solely on their local audience. Then, less than one month after Chattanooga Tourism Co. closed their visitor center, a tornado touched down, causing damage to thousands of homes and businesses and injuring multiple residents. Their city needed them more than ever.

Strategy: Within days of Tennessee’s stay-at-home order going into effect, Chattanooga Tourism Co. launched **#ConnectChatt**, a collection of virtual experiences focused on two pillars: entertainment and education. Virtual scavenger hunts and tours hosted by local partners, including attractions like the Tennessee Aquarium and Charles H. Coolidge National Medal of Honor Heritage Center, are showcased on the [DMO’s website](#) and Facebook page, [@VisitChatt](#). The Facebook page became a hub for fun virtual concerts featuring local talent whose gigs and livelihoods have been affected by restrictions.

Results: What began as a way to engage Chattanoogaans and support local talent has also helped increase the city’s brand awareness among regional markets as a music destination. In addition to the hundreds of positive comments and impressive number of people tuning in, performers reported tip amounts of \$300+ for single sets.

“From Chattanooga Tourism Co.:

“Don’t be afraid to be a trusted resource. We found our partners and community needed Chattanooga Tourism Co. to be a centralized hub of information and resources. We stepped up and did regular discussions with our partners—daily at first, then weekly. Post-crisis, we’ll transition to monthly discussions and keep this format of being a trusted local resource. People outside your organization might be able to provide information or research, but no one else will do it through a local tourism lens.”

Colorado Tourism Office: Protecting Colorado and Coloradans

Challenge: Colorado Tourism Office partnered with Leave No Trace Center for Outdoor Ethics to launch the [Care for Colorado Principles](#) in 2017, a campaign aimed at educating visitors how to mindfully explore Colorado’s landscape. Care for Colorado had been running successfully (and even earned [national recognition](#)), but when the COVID-19 pandemic hit, Colorado’s residents had new worries about tourism. CTO needed to a way to convey the importance of protecting both the environment and the people of Colorado during the health crisis.

Strategy: CTO developed a new definition of responsible tourism that promoted care for the state’s natural resources and for the people who call Colorado home. They shared this message with consumers and created a sense of urgency for adopting new safety practices via a fresh video entitled “[Care for Coloradans](#),” which was distributed across social media and through paid media. They also developed an [updated edition of their “Are You Colo-Ready?” brochure](#) for their Welcome Centers across the state. To support the local tourism industry in spreading the word, CTO created a Care for Coloradans Responsible Tourism Toolkit for industry partners, including downloadable social graphics and poster templates promoting safety requirements.

Results: Care for Colorado videos have been viewed more than 200,000 times across CTO’s website and Facebook and even more on partners’ channels. In addition to engagement from potential travelers and residents on social media, the Care for Coloradans initiative has earned industry recognition and even support from the state’s governor. Regarded as an industry leader for their proactive approach and for balancing their marketing to leisure travelers with protecting Colorado from overtourism, CTO Director Cathy Ritter recently spoke about their efforts at City Nation Place and Alaska Tourism Conference.



From Colorado Tourism Office:

“As we’ve seen across the nation, it is absolutely vital for tourism offices to work closely with their public health counterparts, both to allay concerns and lay the groundwork for effective tourism promotion. Like never before, our offices often are in the position of seeking permission to promote and sharing messages we never thought we’d be sharing -- like stay home if you’re sick. To be relevant to the times, to be of value to our destinations, it’s absolutely imperative to be sensitive to these new realities.”

Delaware Tourism: Providing a Cinematic Platform

Challenge: Small businesses make up 98% of the businesses in Delaware and contribute significantly to the state’s tourism sector. These small businesses also employ 55% of Delawareans, so stay-at-home orders have dealt a tremendous hit to the state’s residents and hospitality community. As Delaware residents have ventured out with new social distancing guidelines, many businesses have been anxious to safely welcome them back and stay afloat.

Strategy: The Delaware Tourism Office developed a campaign called Local Discoveries, which provides a platform for the Office to promote small businesses via user-created video content on [social media](#) and [YouTube](#). The series showcases how businesses are adjusting operations to keep customers safe, while also reiterating the importance of buying local. This idea also stemmed the Protecting Delaware video series. Working together, Delaware Tourism and the Delaware Division of Small Business developed videos that show the steps the businesses are taking to comply with the Delaware Customer Protection Standards.

Results: In addition to raising awareness for small businesses across the state and creating a sense of appreciation between small businesses and their local communities, the videos have strengthened partnerships between Delaware Tourism and Delaware Division of Small Business, along with the businesses they partner with. They are tracking video views and reach but have been even more encouraged by the relationships they are building by helping local partners during these hard times.



From Delaware Tourism Office:

“We measured success by video views and reach but also by how important it is to the partner. A few thousand views go a long way when the partner feels we were there for them during a difficult time... At such a hard time, it can be easy to feel like we’re not doing enough. But, we are. Keeping in consistent contact by phone, not just email, gives businesses a personal connection, shows we’re making the effort and helps them get the best resources from our office. The direct contact is also better for businesses fighting to survive that don’t have time to do things like fill out a survey.”



Discover Puerto Rico: Celebrating Local Culture

Challenge: Exercising an abundance of caution, Puerto Rico was one of the first destinations in the US to move into a restricted state of shelter-in-place in mid-March. With all nonessential business and travel paused, and the majority of the population staying home until further notice, Discover Puerto Rico needed an inventive solution that would support the local community, empathize with their audience and keep Puerto Rico top-of-mind.

Strategy: Discover Puerto Rico reacted quickly, launching its first “virtual vacation” over the last weekend of March. The lineup featured unique live happenings meant to virtually transport viewers to Puerto Rico through Zoom and Instagram, including [salsa dancing lessons](#) and [cooking and cocktail-making tutorials](#). They connected locals, past visitors and future visitors alike to celebrate, learn about and partake in Puerto Rican culture.

Results: The near-instant success of the [Virtual Vacay](#) prompted Discover Puerto Rico to keep the momentum going with a calendar of additional events. Already, Discover Puerto Rico has received an impressive response through earned media and social media, including more than \$6 million in ad equivalency and nearly 600 million impressions, a 13% increase in Instagram impressions and a 23% increase in Facebook impressions. Instagram profile views increased 112% and there was an influx of 6,800 new followers.

From Discover Puerto Rico:

“It was important that the initial activations were rooted in the Island’s culture – a unique combination of African, Spanish and Taino Indian history, that makes Puerto Rico a one-of-a-kind destination. We highlighted dance, food, nature and wellness, which are differentiating products and experiences that set Puerto Rico apart...Our local industry was so excited that many of them started reaching out to us to pitch ideas for how their businesses could help support this effort. During these uncertain times, our industry partners were eager to get exposure for their businesses and collaborate on the initiative.”

» Additional Resources: Miles Partnership is curating the latest research and updates from industry leaders related to COVID-19 and the tourism industry at covid19.milespartnership.com.





PREMIER
PARTNER

ABOUT

MMGY Global is the world's leading integrated marketing company specializing in the travel, tourism and hospitality industry representing multiple agency brands with one goal: to inspire people to go places. Our communications practice is comprised of multiple best-in-class brands including MMGY, the company's flagship integrated marketing agency, Digital Spring, Grifco, Hills Balfour, Myriad, NJF and Travel Intelligence. Together, we represent more than 400 travel and tourism marketing experts across the globe.

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Honoring Leadership In Tourism Recovery.



On the heels of the most challenging year travel and tourism has ever faced, we look to four key pillars driving recovery for destination organizations in 2021 and beyond and the CEOs within the industry who are leading the way.



Focus on Community Stewardship

Cathy Ritter / Director, Colorado Tourism Office

Never has there been a greater need for tourism organizations to advocate for the communities in which they serve. Under Cathy's leadership, the Colorado Tourism Office has been a leader in identifying resident sentiment, establishing marketing strategy that caters to community need, and maintaining proactive dialogue and communication within the destination.



Transforming the Approach to Diversity, Equity and Inclusion

Elliott Ferguson / President and CEO, Destination DC

The tourism industry has the opportunity and responsibility to harness the power of travel to create substantial change in how we serve the underrepresented communities of this country. Not only has Elliott led a team in our nation's capital around this effort but he has also served as a voice for the entire industry to drive actionable transformation.



Resetting Expectations for Responsible Tourism

Paul Nursey / CEO, Destination Greater Victoria

It's not just the right thing to do – there is true consumer demand for travel options that drive community sustainability and environmental responsibility. Under Paul's vision, the Victoria region has proven the financial business case for embracing responsible tourism as a cornerstone of its destination strategy.



Evolving the Industry

Gretchen Hall / President and CEO, Little Rock CVB

The boundaries of travel and tourism are blurring, with arts, sports and entertainment at the core of a new approach to destination marketing and management. Leading an organization that not only markets the destination of Little Rock but also manages its premier arts and entertainment venues has been a hallmark of Gretchen's success – and a model for future growth and revenue diversification for DMOs across the country.





INDUSTRY
PARTNER

ABOUT

Meeting Professionals International (MPI) is the largest meeting and event industry association worldwide. Founded in 1972, MPI provides innovative and relevant education, networking opportunities and business exchanges, and acts as a prominent voice for the promotion and growth of the industry. MPI has a global community of 60,000 meeting and event professionals including 15,000 engaged members. It has nearly 70 chapters and clubs, with members in more than 70 countries worldwide.

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Reuniting to Recover

Through detailed research and an in-person gathering laser-focused on safety, MPI and its members are looking ahead to a brighter future for the meeting and event industry.

BY RICH LUNA, ALLAN LYNCH AND MICHAEL PINCHERA

The 2020 Summer Edition of *Meetings Outlook* saw the most negative business projections in the history of Meeting Professionals International's (MPI) award-winning, quarterly survey. The saving grace then was hope, optimism and the knowledge that meeting professionals excel at thinking on their feet.

The survey results from the 2020 Fall Edition—announced at the start of MPI's 2020 World Education Congress (WEC) in Grapevine, Texas, Nov. 3-6—however, actually show a sizable shift in business projections over the next year, suggesting a perception, at least, that the industry has or will soon be turning a corner (albeit, with some major medical developments necessary before business can truly take off again). More than 58 percent of respondents expect favorable business conditions over the next year, with 34 percent anticipating a negative landscape. Compare that to the results from last quarter's survey (36 percent favorable, 59 percent negative) and we clearly see a polar shift.

"I believe that 2021 will start out pretty much virtual with some hybrid events. Hopefully a vaccine will be tested and widely distributed by the end of 2020 or





early next year,” said Timothy Neill (MPI Oregon Chapter), sales manager, AV Rental Services. “Even when this happens, there will be reluctance to resume meeting in person, especially in large groups. Based on this, I believe all of 2021 will be hybrid, with the ratio of in-person versus virtual attendees slowly transitioning to more in-person.”

“It will be better than 2020, but nowhere close to returning to pre-pandemic levels,” Neill believes.

In fact, the majority of respondents (65 percent) believe business won’t return to pre-coronavirus levels until 2022 or 2023.

While it’s certain that live, face-to-face events will come back, 63 percent of respondents are concerned that the proliferation of virtual/hybrid events during the pandemic will permanently affect the desire for face-to-face gatherings in the future. Some respondents even commented that face-to-face meetings/events will never return to pre-COVID levels.

The data suggesting a fuller return to live, face-to-face events is reinforced in the survey’s attendance projections, even though respondents overwhelmingly report that virtual technology options are indeed here to stay and will be leveraged in place of some events that, pre-pandemic, would have been in-person.

Live attendance projections are creeping back up from an all-time low, as 27 percent of respondents now envision favorable in-person



numbers next year (last quarter, only 11 percent said the same). At the same time, projected virtual attendance remains incredibly strong, with 83 percent of respondents expecting favorable remote numbers over the next year.

Safety and the Future

With more than 600 industry professionals at the Gaylord Texan Resort and Convention Center in Grapevine for MPI’s signature education event, the president and CEO of MPI acknowledged on Nov. 3 that WEC was about to launch in earnest with attendee safety as the top priority.

“That is the intent this week, to demonstrate how a conference, a live event could be put on in the new normal, a conference with safety and wellness at the forefront of everything we do,” Paul Van Deventer said at a news

conference. “Duty of care is the most critical thing we can demonstrate this week. Attendee wellness is our top priority.”

More than 1,700 meeting industry professionals participated in WEC, with 608 attending in person and 1,739 joining via the digital experience.

The event, which was moved from June, is believed to be the first fully live, hybrid industry education event—with no pre-recorded content—since March to test the boundaries of a large in-person gathering and is being viewed as a litmus test on how to safely return to face to face.

Each in-person attendee received a registration kit in advance and filled out daily questionnaires and went through daily temperature checks onsite. Masks were required (except when actively eating or drinking) and

all sessions featured social-distanced spacing throughout plus single-serving food and beverage.

MPI made several other announcements at the news conference. Its signature European event, the European Meetings and Events Conference, will align with IMEX Frankfurt in 2021 rather than be held in Brighton, England (where it will go in 2022). MPI has also signed a new five-year agreement with the IMEX Group, its largest strategic partner.

Darren Temple, MPI's COO, gave an organizational report at the news conference, while chairs Steve O'Malley and Chandra Allison gave updates on the International Board of Directors and MPI Foundation Global Board of Trustees, respectively.

Reuniting for Recovery

Elizabeth Zrelak, director of meetings and events for InHouse Physicians, which monitored attendee health and had a physician on site at WEC, said 1,820 attendees were screened over the course of the event. Four people visited the clinic for illness or injury not related to COVID-19, while seven attendees requested a quick-response coronavirus test.

Annette Gregg, senior vice president for experience at MPI, said security reported willing compliance, finding no one without a wristband. In MPI's duty of care and personal accountability statements, the association has asked that anyone testing positive for COVID-19 within 14 days of leaving WEC contact MPI so attendees can be notified regarding contact tracing.



"I could not be any prouder of our team that was the first to author a robust duty of care for our industry," said Darren Temple, chief operations officer for MPI. "We took what we knew to be the best standards in a pandemic and coupled them with our own innovative and rigorous expectations, and the rest was a [duty of care] that is now the standard."

In-person attendee Zoe Moore (MPI Northern California Chapter) says her anxiety level

was high before arriving in Grapevine.

"But upon arrival I observed a lot of protocols that put me at ease," she said. "There were hand-sanitizing stations, temperature checkpoints, floor signage, staff reminding attendees to 'mask up y'all' and several other methods used to ensure safety of attendees."

The conference also featured a Hosted Buyer Program and live Digital Connections for business appointments, and there were more than 20 participants live for the Thought Leaders Summit.

WEC was not the first hybrid event to take place in the industry, but it is believed to be the first to feature all live programming. Part of the digital experience included a five-hour *MPItv* broadcast each day that incorporated the general sessions for the digital audience and exclu-

listening from afar—I can only imagine what it was like in person."

MPI made several announcements during WEC. The MPI Diversity & Inclusion Committee was honored with the MPI Chair Award during the President's Dinner, which also honored MPI's chapter presidents, outgoing board members and recipients of the RISE Awards. Ray Bloom and Carina Bauer of the IMEX Group—which donated US\$250,000 to MPI to provide support to meeting professionals facing distressed financial situations this year—were recognized as Industry Champions. The MPI Foundation raised more than \$60,000 through its WEC activities.

MPI is planning substantial research and education to show how WEC was executed, including a December webinar to "give trans-



David Allison

sive interviews and content. Speakers who gave presentations in Grapevine to a live audience would go to a green room and make the same presentation live for the digital audience.

Yvonne Dewar (MPI Toronto Chapter) said she was grateful that MPI took the risk to host a hybrid congress without pre-recording and was transparent throughout WEC with challenges.

"It warmed my heart seeing my fellow meeting professionals attend in person at the Gaylord Texan," she said. "The content was essential for our industry and speakers were engaging. It was very emotional watching and

parent, tangible tools to planners and suppliers about our entire WEC planning journey," Gregg said.

A Values-driven Approach to Events

David Allison presented "The Breakthrough Power of Shared Values - What Buttons to Push" during one of the WEC general sessions.

After a decade as a top marketer and strategist on the U.S. West Coast, Allison sold his company and invested four years pursuing what former colleagues would call his "kooky idea"—developing Valuegraphics. It turned out to be so kooky it became the basis of a bestselling book and recommended read by *Inc.* magazine. *We Are All the Same Now* attracted the attention of Fortune 500 companies and made him an in-demand speaker.

Frustrated by the usual demographic and psychographic metrics that are such a part

Bridging the Gap

By Tanida Mullen

As we take a deep look at what diversity and inclusion means for the meeting industry, it is clear now more than ever that we have different struggles and challenges as individuals. What does this mean for you as the meeting professional reading this article right now? It means that you have a new responsibility, a new charge.

Our experiences in this industry are different. How do you learn about different experiences and perspectives? You ask. You listen. In my opinion, without taking the time to inquire from a place of curiosity, you start your journey without a roadmap or idea of how you'll get there. Imagine someone reaching out to say they want to help you get to a destination, but they have no idea how far you've traveled or where you want to go. It's important that we listen with the intent of letting the voices of the oppressed be heard. Here are a few questions you can ask of professionals who have been marginalized, excluded or underserved.

- Who do I need to engage in conversation?
- What do I need to know about the community to offer the best programming or service?
- In what way do you feel unheard?
- What have you not felt comfortable sharing up until now?
- What are your challenges?
- What do I need to know about the community to offer the best programming or service?
- How can I be of assistance today?
- What am I not seeing?

Ultimately, the path to change starts with you, your mindset and how far you are truly willing to think beyond



what you know at this moment. While organizations like MPI will help to facilitate conversation, provide resources and work to change our industry for the better, the big shift, the one that will be pivotal for change, starts with your commitment to individual action and commitment to change the current narrative of the industry as it relates to diversity, equity and inclusion for those who are underrepresented.

Over the next few months, you will hear voices that might be new to you and see faces of the members that want to help bridge the gap of diversity, equity and inclusion (DEI) and the meeting industry at large. Listen intently and ask questions from a place of curiosity. Those steps alone can begin your personal journey to facilitating the change our industry needs. I look forward to taking this journey together.

Tanida Mullen is co-chair of the 2020 MPI Diversity & Inclusion Committee, which was honored with the Chair Award at the World Education Congress in Grapevine in November.

of the marketing DNA, Allison set out to increase our understanding of target markets through a disruption that embraced scaling up metrics used by MMPI, Myers-Briggs and therapists to get values in line with actions.

"Demographics tell us what people are, not who people are," Allison said. "And if you know what people are, that doesn't tell you very much. It doesn't tell you anything about their motivation, fears, anxieties, values,

wants and needs. Nothing. It just gives you a way to put a fence around them. These people are here and they exist. That's as far as we can go with a demographic description."

To better understand motivations and motivators, Allison's team conducted more than 500,000 surveys in 152 languages to create an exact, unique model of the world's population.

"It's called a random stratified statistically representative sample—and it's never

been done before," he said. "We've built the world's very first database of what everybody on the planet cares about. And we can segment this based on any product, industry, service, brand or idea."

Allison brought his groundbreaking research into what people want from the meetings and events they attend to WEC to help meeting professionals with future program design, marketing and every other aspect of a meeting or event. ■



SearchWide Global

PRINCIPLE
PARTNER

ABOUT

SearchWide Global is a full service executive search firm primarily for companies in Destination Organizations / Hotels & Resorts / Venue Management / Experiential Marketing, Tradeshow & Exhibition / Industry Associations / Sports & Entertainment. Specializing in C-Level and Director level executive searches for companies ranging in size from Fortune 500 corporations to mid-sized public and private companies and associations. Founded in 1999, SearchWide Global is headquartered in the Twin Cities and operates worldwide. For more information visit SearchWideGlobal.com.

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The Future of Tourism Leadership

Leading a DMO has certainly gotten harder over the years as it relates to every aspect of running the business. COVID, social injustice and civil unrest have all added a new level of complexity and uncertainty that none of us have been trained for. This has also elevated the psychological impact and stress that is on our DMO leaders every day. What to do in the short term:

- Take care of your mental and physical health. We cannot lead others until we first care for ourselves
- Treat your DMO like your own business and run it as such. Don't be afraid to re-build it.
- Keep your head up and don't forget to lead – It is so easy to put our heads down and try to survive every day/week/month. Your team needs you now more than ever!
- Continue to over communicate with all stakeholders either live or by ZOOM. Curate the content and be the thought leader on things that will help them get their business' through this.

What will DMO's look like post COVID:

We think that the organizational charts will likely have some new positions:

Health, Wellness and Safety Leader – This will be important going forward for destination organizations. Who better to capture all that is being done in the destination to keep travelers safe, than the DMO? People from other industries that have this type of experience will likely be a great asset to our industry.

Diversity, Equity, and Inclusion Leader – If you have not yet committed to a DE&I strategy, now is the time. Much more on this later.

Community Ambassador – In addition to the long list of important community stakeholders there will be a need to have effective resident communication and engagement. This will require “showing up” at every chamber, rotary and township council meeting on a consistent basis to establish meaningful relationships and awareness.

We should also see a lot of job sharing, cross training and part time or consulting opportunities. As the industry recovers and needs to bring talent onboard, yet remain nimble due to budget, this offers a solution to that. For those laid off or furloughed, there might be some great opportunity for them to get back into the workforce and possibly hold multiple roles at once.

Although we're adapting to technology, everyone still craves human interaction. Consensus building, diplomacy and connection cannot be reached to its fullest without the organic nature of meeting face-to-face. A leader will need to navigate those waters as the COVID-19 situation evolves.

Great teams need great leadership. Today's leaders need to focus energy on motivating their teams, retaining their top talent, recruiting up-and-coming talent, and dedicate opportunities for students and recent graduates. Being innovative can be as simple as planting seeds with the youth so that our industry benefits for years to come.

Board Diversity

SearchWide Global along with key partners, Destinations International and DMO Proz, are committed to providing resources for destination organizations seeking to diversify their boards and internal teams for the betterment of their communities.

In our recent study, we found that Destination Organization Boards were typically boomer-male dominated, and 65% of Destination Organization CEOs were dissatisfied with the ethnic diversity on their Boards. This absolutely needs to be addressed as we seat new leadership. Other findings from the study:

- While LGBTQ representation has improved, it is still rarely addressed at the Board level.
- There are very few Boards that include those that are physically challenged in some way.
- Young professionals need to be better represented as the future leaders of their communities.

In their initial incarnations, these Destination Organization Boards were often comprised of hoteliers. The managers of these properties were the ones responsible for remitting the hotel occupancy tax to local government and, thus, it was initially believed these individuals were best suited to guide the work of the Destination Organization. Over time, it became apparent that a more diverse set of individuals needed to be at that table. Restaurateurs, retailers, attractions, and cultural and business leaders were recruited to better represent the community the Destination Organization was promoting.

Today, we realize a much broader diversification of the Destination Organization Board is needed; one that takes into consideration a more comprehensive understanding of those we represent through our work to enhance quality of place and life. A recent study out of Indiana University found that only 7.5% of nonprofit Board rosters were made up of African Americans, when the black population of the United States is nearly twice that.





As the nation increasingly recognizes its lack of diversity and inclusion in opportunities for minority communities, it is clear that change must begin at home. Destination Organizations must more accurately represent the community they serve, both internally (staff) and at the Board level, which may require a change in bylaws or state statutes.

While Board members must share the same values and mission of the organization on which they serve, the best Boards are made up of individuals who have experienced different life paths from which they can share their unique perspectives on the challenges and opportunities ahead. Without diversity, Destination Organization leadership will not be prepared to advocate for the interests of their community when speaking to legislators, community leaders or investors.

Without Board diversity, it is unlikely that key diversity initiatives will remain a top priority for Destination Organizations and a consistent pillar in strategic plans. History has shown us that without diversity at the Board level, these conversations will, over time, become less and less important in the boardroom and, thus, be more likely to slip off the radar for the CEO.

Significant steps need to be considered and taken in order to advance the mission of diversifying boards. SearchWide Global, Destinations International and DMO Proz have identified the steps needed to begin the process.

Diversity, Equity & Inclusion (DE&I)

Workplace diversity focuses on the differences and similarities that people can bring to an organization or culture within that organization. Diversity has many dimensions which influence the identities and perspectives that people bring, such as profession, education, parental status, geographic location, disability, ethnicity, race, and gender. As an industry we have to strive to be inclusive of everyone.

Apprenticeship Program

SearchWide Global has partnered with Destinations International (DI) and the International Association of Venue Managers (IAVM), to foster a 600-hour apprenticeship program to provide talented apprentices with hands-on professional work experience, with the participating Destination Marketing Organization and the selected Destination Partners.

The goal of the program is to expand the hospitality and tourism workforce by attracting underrepresented and ethnically diverse college graduates and students to career opportunities they may not have considered. We recognize the importance of cultivating a tourism industry that represents a wide variety of individuals and celebrate the broad range of human differences among us while embracing the commonalities we share.

In order to have an impact on ethnic diversity in the tourism and events industry long term, we must first engage with young professionals in a meaningful way. For this apprenticeship program to truly succeed, there must be career planning, ongoing mentorship, support from our industry partners, and job placement at the end, and we hope to add value in all those areas.

We encourage all DMO leaders to consider an apprentice in the years to come. Imagine the difference we can make if we train, hire and mentor 30 young people a year in 30 different destinations.

Closing

2020 has brought challenges that no leader could have been fully prepared for. The travel and tourism industry came to a screeching halt, and although we don't know exactly what recovery looks like or how long rebuilding will take, we do know the industry needs the best possible leaders to pave the way. Those leaders need to look inward first, focus on their health and wellness so they have the stamina to lead a dynamic team and weather this storm.

Lastly, and most importantly, we have to remember not to stray from our core mission – selling and marketing our destinations. Our residents, elected officials, board, community stakeholders and staff depend on it.





**PINNACLE
PARTNER**

ABOUT

Simpleview is the worldwide leading provider of CRM, CMS, website design, digital marketing, revenue generation, and mobile technologies for destination marketing organizations (DMOs). The company employs 350+ staff and works with 900+ travel, tourism and convention marketing customers on six continents, from towns of less than 30,000 to world capitals, including Los Angeles, New York and 14 more of the top 20 U.S. meetings destinations, Dubai, East Sweden, Guadalajara, Melbourne, Prague, Reykjavik and the countries of Malaysia, Norway and Scotland.

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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 Crowdriff



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

future **tourism** group | simpleview

For more information, visit 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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**PREMIER
PARTNER**

ABOUT

STR provides premium data benchmarking, analytics and marketplace insights for global hospitality sectors. We deliver data that is confidential, accurate and actionable, and our comprehensive solutions empower our clients to strategize and compete within their markets. STR was acquired in October 2019 by CoStar Group, Inc. (NASDAQ: CSGP), the leading provider of commercial real estate information, analytics and online marketplaces.

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HOW SHOULD TOURISM INDUSTRY LEADERS THINK

about returning to “normal”
operations, in an industry that looks
vastly different than it did just a few
months ago?

Let's begin with a look back at past industry downturns. In 2001 and in 2009 it took between 18 and 22 months to fall from the pre-downturn peak to the trough of the downturn, on an annualized basis. It then took between two and a half to three years to return to pre-downturn levels, or over one and a half times longer than the decline.

For the current downturn, STR along with Tourism Economics, is projecting a much more severe downturn, and a slower recovery. While the industry is forecasted to reach the lowest point of annualized performance within 12 months, demand is not projected to return to 2019 levels until 2023. ADR is projected to take longer to recover, so RevPAR is not forecasted to return to 2019 levels until after 2024, about four times longer than the decline.

Two main factors set this recovery apart. The first is the unprecedented severity of the downturn. Tourism Economics projects a cumulative GDP decline that is three times larger than the 4% decline due to the Global Financial Crisis and the 0.4% decline in 2001. This is projected to result in a RevPAR decline of over 50% in 2020.

The second factor is the conditions necessary for a

recovery to occur. For the industry to begin to rebound, travelers need to be more than just financially able to travel. They also need to be confident that traveling will not put their health at risk, and they need to comply with state or local restrictions on traveling or congregating. The same is true for business travel; tightening travel budgets is not the only restriction to the return of corporate and convention travel. Companies also want to be sure that they are keeping their employees safe.

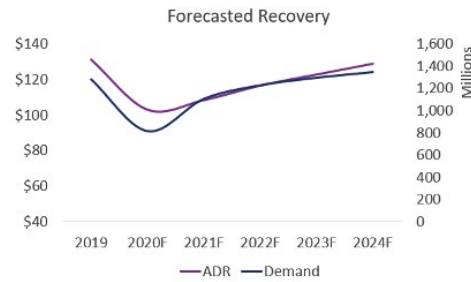
Furthermore, the industry's recovery is not as simple as just the return of demand. To ensure cleanliness and allow for social distancing, hotels may partially reopen, leaving 50% or more of their rooms still closed on any given night. The nature of food and beverage operations will change, particularly for banquets and buffet-style dining. Events will be limited in capacity for the near future, with a much smaller number of people occupying the same meeting or convention space.

TOTAL US: MUCH LONGER RECOVERY AHEAD

Given the economic and health concerns that will govern this recovery, some market types are better positioned than others. Drive-to markets will see demand return more quickly, as travelers avoid airline travel and opt for shorter or more cost-effective vacations. After both the 2001 and 2009 downturns, hotels in areas defined

Total US: Much Longer Recovery Ahead

Months from TTM RevPAR peak to trough, trough to prior peak



Source: STR, 2020 © CoStar Realty Information, Inc.

as “drive-to” rebounded quicker to pre-downturn levels than hotels within urban cores. These markets may see a further boost in this recovery, with travelers wanting to avoid congested cities where it will be harder to socially distance. The data indicates that these less congested markets are better positioned, with summer data showing strong occupancies in areas like Gatlinburg/ Pigeon Forge, Panama City, FL, and Myrtle Beach.

On the other hand, markets such as Miami and San Francisco that see a large amount of demand from international travelers will see a longer recovery. In 2019, international demand made up approximately 12% of all US hotel demand. In 2020, the demand share is projected to shift further to domestic travel.

It is expected that as with previous downturns, leisure demand will return before group demand, although that will vary depending on the market. The early recovery of drive-to markets mentioned are also indicative of the return of leisure travel rather than business travel, as they see even higher weekend than weekday occupancies. Leisure markets that are only accessible by plane or by boat will be much slower to recover. Additionally, the recovery of leisure-driven markets will also depend on the recovery of their demand generator. A hotel near a national park, where there is plenty of open space to recreate safely, can expect a faster recovery than one near an amusement park or concert venue.

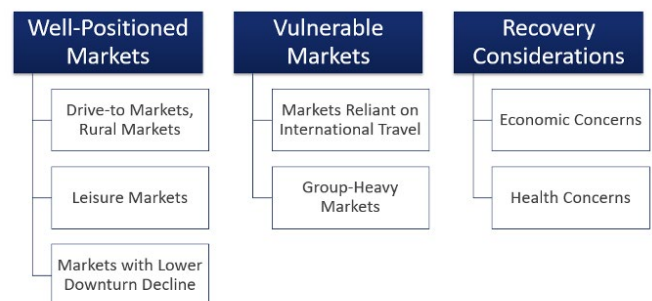
In previous downturns the markets and segments quickest to recover are, perhaps obviously, those that do not decline as dramatically as others. Therefore, hotels and markets that were still able to capture demand this

past summer are expected to be quicker to return to pre-COVID performance.

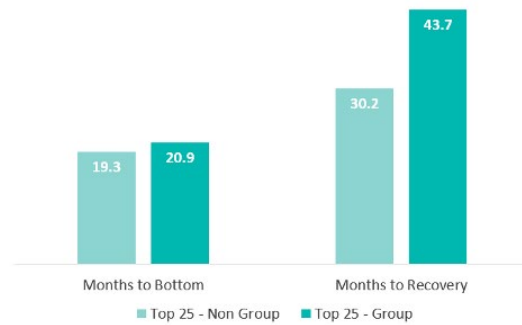
Corporate demand will be slower to return. The expansion of video calls and remote meeting technology since the last recession make it more likely that companies will replace in-person meetings with remote ones, especially as they prioritize the need to keep their employees healthy and safe. Lastly, group-heavy markets also have a long road to recovery ahead.

WHAT WILL RECOVERY LOOK LIKE?

Looking back at the industry’s recovery following the global financial crisis, fifteen of the top 25 markets had an above average group demand share. These group-dependent markets took 13 months longer to return to pre-recession annualized RevPAR levels. This longer recovery is influenced in part by the longer booking windows of group travel. Even as the budgets or appetite for convention or other group business returned, the necessary planning time for those events extends the timeline of recovery.



Last Recession:
Group Market Recovery 13 Months Longer To Return to Pre-Downturn Levels
Average months from TTM RevPAR peak to trough, trough to prior peak; 2009 Downturn



2019 Group-Heavy Markets

- Nashville, TN
- Phoenix, AZ
- Orlando, FL
- Atlanta, GA
- Dallas, TX
- San Diego, CA
- New Orleans, LA
- Denver, CO
- Norfolk/Virginia Beach, VA
- Washington, DC-MD-VA
- St Louis, MO-IL
- Chicago, IL
- Minneapolis/St Paul, MN-WI

Source: STR. 2020 © Colliers Realty Information, Inc.

Conditions are exacerbated by the unique limitations of the COVID-19 crisis. State and local laws or health guidelines have prevented conferences and conventions for the near future, and other generators of group demand such as weddings or sports tournaments have been postponed or limited in size. Therefore, the type of group business a market draws on is important.

The first groups to return will most likely be smaller and more regional in nature. With all the group cancellations in 2020, it is anticipated there will be significant pent-up demand in 2021/2022 particularly as the likelihood of a successful vaccine for COVID-19 improves.

DEMAND

Some hotel segments weathered the initial COVID storm better than others and saw a faster path to recovery. These hotels were well-equipped to serve the remaining demand in the crisis, based either on their property type or location. Extended-stay hotels outperformed throughout the spring/summer with occupancy nearly double the total US occupancy. This property type, built to accommodate longer stay travelers, was a natural fit for guests planning to stay in a location for weeks at a time. With many restaurants closed and food options limited, the in-room kitchenette amenity in extended-stay properties made it easier for guests to prepare their own meals.

These customers include homeless populations, healthcare workers, construction workers, and airline crews conducting routine maintenance on grounded planes. These customers are not necessarily the typical source of demand for hotels, but many operators

welcomed these new demand sources to both serve the needs of their communities in these unique times and avoid closing their doors. Recovery will likely feature similarly creative approaches to finding and serving the returning demand. Some college town hotels, facing a lack of big, demand generating events such as Homecoming, have considered serving as student housing as colleges may look to reduce dorm capacities to allow for more social distancing.

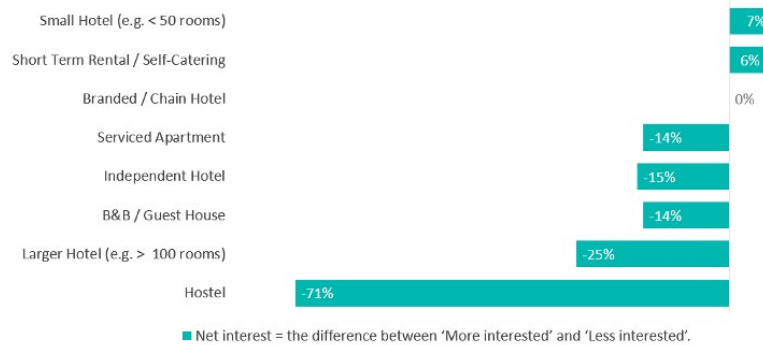
Where Was Demand Coming From?



Where Could Demand Come From?



What accommodation type is most attractive in a post COVID-19 world?



Q. Thinking about your attitudes before COVID-19 to how you feel now, how interested are you in the following types of accommodation?
 Source: STR Tourism Consumer Insights Traveler Panel Survey conducted August/September 2020. Source: STR. 2020 © Colliers Realty Information, Inc.

In a recent study of travelers conduct by STR's Tourism Consumer Insights team, small hotels and short term rentals/self catering accommodations proved to be a more attractive accommodation for its relatively contact-free experience which further supports this shift in demand. Not surprising, hostels were least attractive given the communal nature of this type of accommodation.

Due to the high degree of uncertainty about the details of the recovery, it will be essential for hotels and DMOs to be flexible and able to quickly adapt to evolving circumstances. This will be particularly important for group and meeting business, as restrictions limiting the size of groups to congregate change regularly. Food and beverage operations also need to become more agile, shifting to different service models and food types to accommodate the customer's need and comply with updated health and safety guidelines.

Lastly, that agility will also be necessary in the broader context of a hotel or DMO's business strategy. As travelers shift away from airline travel and international travel is reduced for the near future, markets need to re-evaluate what their new source markets are and could be. Even our previous conceptions of what a "drivable" distance is could be too limited; if the only mode of transportation deemed safe by a customer is car travel, they may be willing to drive much further than they previously would have been.

Destinations may need to shift their targeting, and focus on advertising features for leisure travelers seeking wide open spaces and socially distanced venues. Although the severity of decline and timeline for recovery will look very different in this downturn, there

are still lessons to be learned from previous recoveries.

Looking back to prior demand or revenue shocks for your hotel or market can provide a useful starting point as you formulate a strategy for the recovery. What worked previously, and what did not? What has changed for your hotel since the last downturn? What will you need to rethink this time around, given the unique considerations provided by COVID-19?



PREMIER
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ABOUT

Tempest is a multifaceted agency and destination organization advocate that strengthens communities through the innovation and activation of web, marketing, and cloud software solutions.

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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 so excited to be able to share it with you and get you involved.

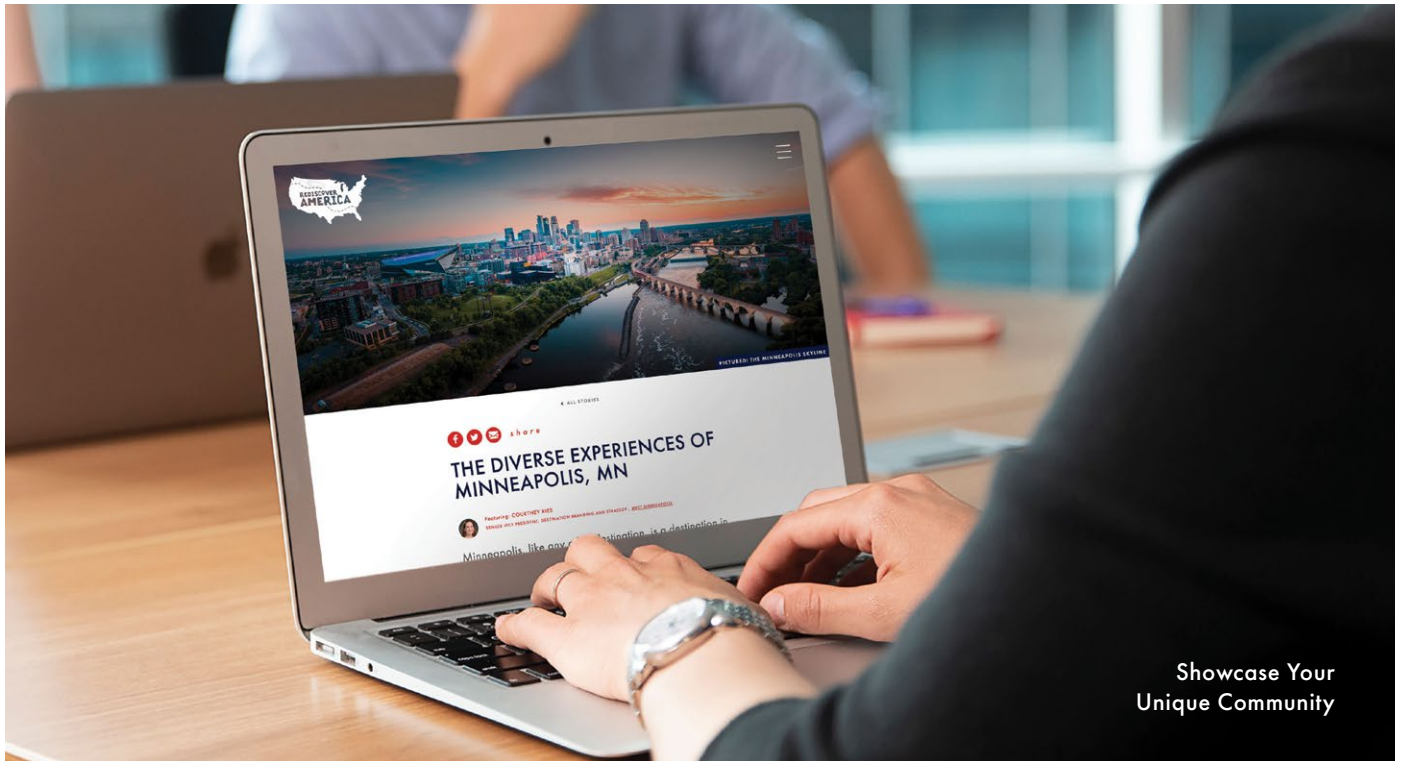
Now let us show you what we've been up to so far, and how we can help you showcase your destination to a new audience.



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

REDISCOVER AMERICA | REDISCOVER CANADA





Showcase Your
Unique Community

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

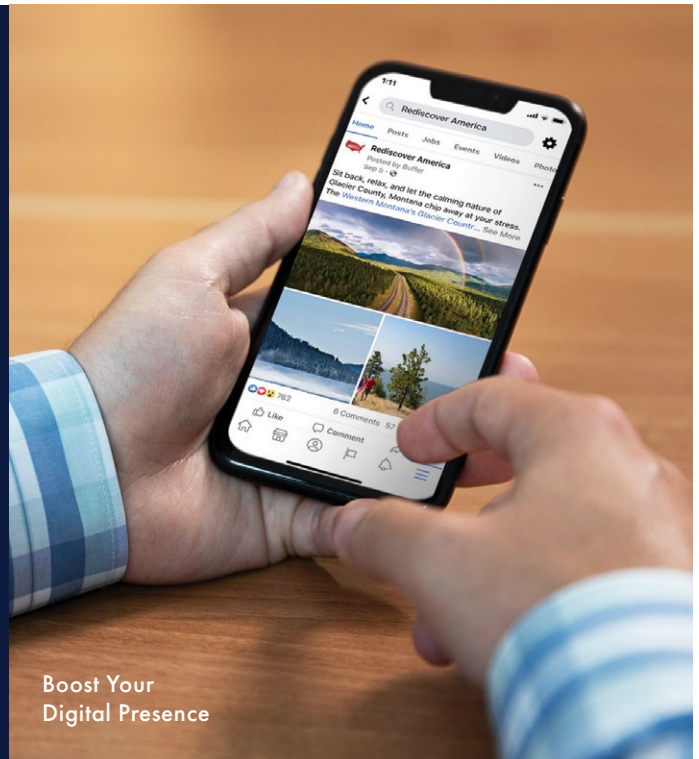
REDISCOVER AMERICA | REDISCOVER CANADA





"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."

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