DESTINATION NEXT

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

2017 FUTURES STUDY UPDATE

DESTINATIONS INTERNATIONAL

July 2017

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DESTINATIONS INTERNATIONAL FOUNDATION

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Dear Reader,

It is our pleasure to release the new Futures Study, a deep-dive into the major trends and opportunities facing the destination marketing industry. The new study's purpose is to continue the important dialogue about the future of our industry and how we can further the impact we make in our local communities.

When DestinationNEXT was first launched in 2014, no one could have predicted the impact it would have on our industry. It has been used by boards and management teams around the world as a strategic roadmap for changing the work we do given the realities of our destinations. The Scenario Model and assessment tool have received high praise. It has helped many communities come together to improve collaboration in their destinations and realize significant economic and social benefits of enhancing their destination's authentic appeal. Over 100 destinations have completed a detailed assessment in the last two years. National and state-wide organizations have also begun using the model.

The visitor economy continues to be one of the bright stars in an uncertain world. The growth of both leisure tourism and business events has outpaced GDP growth the last six consecutive years. Almost 300 million people work in our industry. Over 10% of global GDP is generated from our sector, making it one of the largest and most strategic sectors for local, regional and national entities to pursue.

Despite these facts, our industry is often under-valued. Many in our local communities are unaware of the tremendous benefits associated with growing the visitor economy, the fierce competition we all face, and the important role that destination marketing plays in the development of our communities.

The rewards of capitalizing on the potential growth are great... The risks of stagnation and indifference are real...

DestinationNEXT continues to help us in this important journey to shine the light forward.

Sincerely,

Co-Chairs, DestinationNEXT Advisory Group

Scott Beck
President & CEO
Visit Salt Lake

Lyn Lewis-Smith
President & CEO
Business Events Sydney

EXECUTIVE SUMMARY

Destinations International is pleased to release this new Futures Study, a deep-dive into the major trends and opportunities facing the destination marketing industry. The new study's purpose is to continue the important dialogue about the future of our industry and how we can further the impact we make in our local communities.

Work began in January 2017 to update the 2014 Futures Study. The objectives were to:

- identify new trends and strategies impacting our industry;
- compare those against trends and strategies identified in the 2014 baseline survey;
- determine the new opportunities and potential strategies for destination organizations in the future; and
- determine if the scenario model requires any changes.

The project team completed a detailed review of trends and strategies, supported by 4 advisory panels.

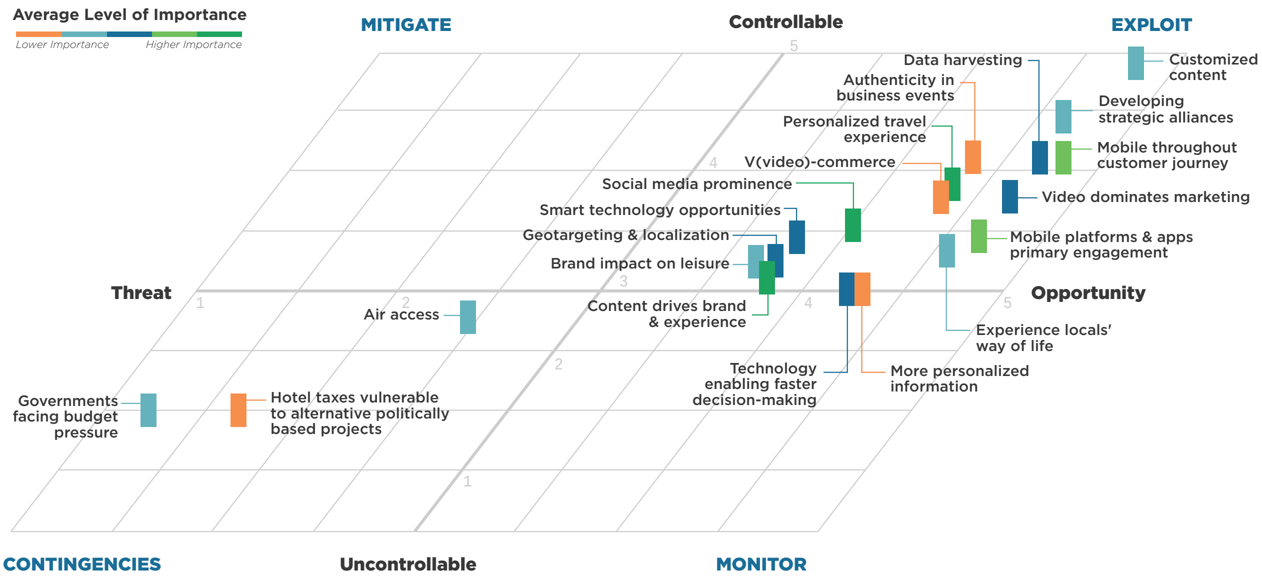
Figure 1:
Advisory Panels

An extensive survey was completed in the Spring of 2017, with responses from **433 participants** in **52 countries.**

The results were analyzed and plotted on a Future Map which assessed the:

- degree to which the trend will have positive or negative impact on the destination organization;
- degree of control the organization has to influence and/or capitalize on the trend.

Figure 2:
DestinationNEXT 2017 Future Map



This analysis revealed significant opportunities for destination organizations to pursue in sales and marketing; product development; and community leadership. We believe the future for our industry is bright with urgent pressure to play a critical role in each of our communities to promote the importance of leisure tourism and business events.

We believe the three transformational opportunities identified in the previous study remain highly relevant today:

1. **Sales & marketing:** shifting from broadcast to engagement and transactional to strategic
2. **Destination management:** playing a greater role in product development
3. **Business model:** greater emphasis on partnerships and collaboration

To deal with the disruption within our industry, we believe there are five critical roles of the re-engineered destination organization of the future: Curators; Adopters; Catalysts; Activists; and Collaborators.

When DestinationNEXT was first launched in 2014, no one could have predicted the impact the developed scenario model would have on our industry. This model is based on two critical success factors for destinations:

- strength of destination
- level of community support and engagement

The intersection of these two major independent factors generates four dramatically different scenarios. Each destination organization can find itself primarily in one of these quadrants.

The Scenario Model and assessment tool have received high praise. It has been used by boards and management teams around the world as a strategic roadmap for changing the work we do, and the realities of our destinations. It has helped many communities come together to improve collaboration in their destinations and realize significant economic and social benefits by enhancing their destination's authentic appeal. Over 100 destinations have completed a detailed assessment in the last two years. National and state-wide organizations have also begun using the model.

These assessments have identified a number of specific issues to be addressed by destination organizations and their entire communities.

Figure 3:
Re-engineering Destination Organizations

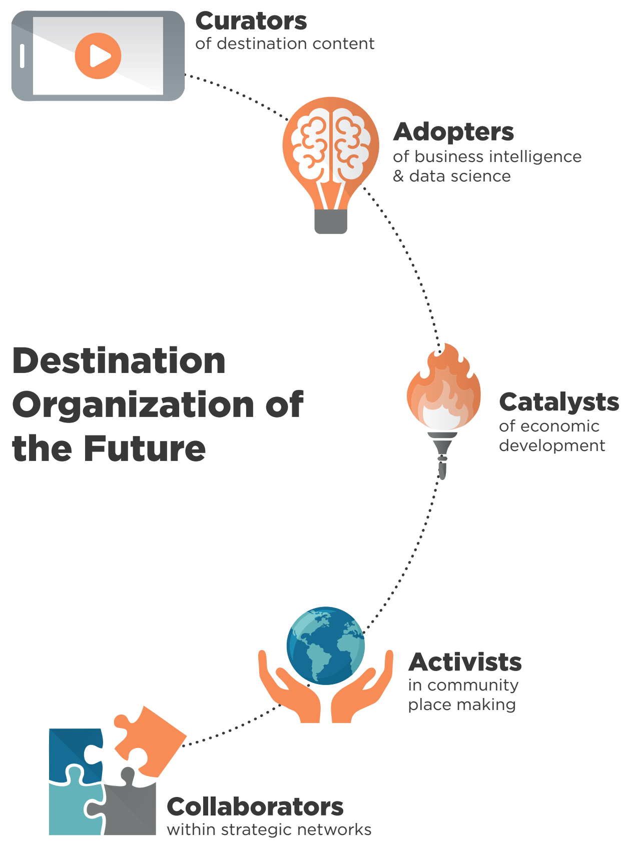
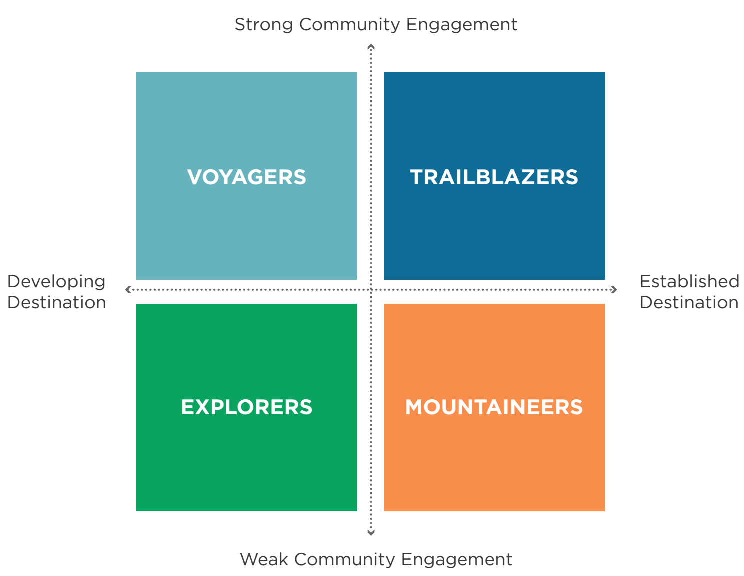


Figure 4:
Scenario Model



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INTRODUCTION

In the midst of a thriving global visitor economy, destination marketing leaders find themselves at a provocative inflection point. On one hand, business is booming at a 4% global growth rate according to the UNWTO. This is despite political turmoil that threatens to constrain the ease of travel access. At the same time, the pace of disruption in the global visitor economy is rapidly transforming how tourism is created, marketed and consumed, challenging leaders to deliver value.

Tourism is not alone in having to manage such disruption. For example, the global retail industry is undergoing unprecedented change where many successful legacy brands may not have a place in retail's future. Some of which is attributed to waiting too long to re-engineer themselves to respond to new realities.

Destinations International has taken the stance that destination organizations need to be alert to the changes that are occurring inside and outside the destination marketing sector to be as prepared as possible for the future. Starting in 2014 with the first phase of DestinationNEXT, Destinations International has challenged the industry to think about the evolving role of destination organizations based on adaption to marketplace and community realities.

This new phase of DestinationNEXT is intended to build on the learnings from the previous study, and to determine updated trends and strategies that will keep the thousands of destination organizations around the world thriving and relevant. The purpose of this phase is to research, analyze and present findings which help guide destination marketing leaders as they re-engineer their organizations for future success.

The research in this phase has delved into the unfettered opinions of a broad cross section of experts, from clients to disruptor thinkers, to community leaders and to destination organizations themselves. Following the gathering of feedback from this diverse and provocative audience, destination organizations from across the globe have been canvassed to understand where the industry is heading and, importantly, how different regions relate to key trends and strategies.

Articulating the trends and strategies that should be at the forefront of future planning is only part of the way forward. Destination organizations have to also look at their make-up to ascertain whether they have the capability to thrive through internal competencies. This project has identified key roles for destination organizations in the future that will impact organizational design and structure. Only with the right structure will the right strategies have a chance to deliver their intended outcomes.

Although destination organizations from across the globe have similar opportunities to pursue and challenges to consider, their characteristics are still amorphous and somewhat misunderstood. By taking a global perspective with regional sensitivity, Destinations International and all agencies involved in advancing the cause of destinations will build a more cohesive view on how to truly make a difference.

DestinationNEXT is not meant to be a beginning, or an end, but rather a step along the way where destination organizations from around the world can check in to determine how they should adjust and reconfigure to the ever-changing destination marketing world. Through in-depth empirical analysis, insightful personal perspectives and interpretation of new discoveries, this phase of DestinationNEXT will help destination organizations with a platform to further entrench their rightful place in the visitor economy ecosystem.

ACKNOWLEDGEMENTS

Destinations International would like to thank the members of the DestinationNEXT Advisory Group, which was established to lead and guide this important initiative. Special thanks to the Advisory Group co-chairs Scott Beck and Lyn Lewis-Smith.

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The Destinations International Foundation provided a grant for this project. DestinationNEXT would not have been possible without their support.

WORK PLAN & DESTINATION ORGANIZATION LEADERSHIP SURVEY

WORK PLAN

Work began in January 2017 to update the 2014 Futures Study. The objectives were to:

- identify new trends and strategies impacting our industry;
- compare those against the ones identified in the 2014 baseline survey;
- determine new opportunities and potential strategies for destination organizations in the future; and
- determine if the scenario model requires any changes.

The project was completed in three critical phases, outlined below:

Figure 5:
Work Plan

PHASE 1
Trends Analysis

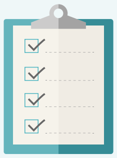
Objective
Completed comprehensive review of major trends and finalized survey

Tasks
a) Completed a detailed literature review of key trends affecting the tourism and meetings industry as well as destination organizations

b) Established 4 global expert advisory panels to interview for additional insight

c) Developed list of 75 key trends and 55 strategies to assess

PHASE 2
Survey & Future Map



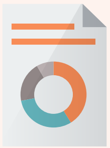
Objective
Administered global survey and produced new Future Map

Tasks
a) Distributed survey to Destinations International members along with several other mailing lists (e.g. ECM, DMAC, COCAL, AMDEM, AACB, and ICCA)

b) Completed extensive analysis of results

c) Prepared new future map identifying key opportunities within control of our industry

PHASE 3
Report & Presentation



Objective
Prepared report for distribution & presentation deck

Tasks
a) Considered implications of new results on Scenario Model

b) Prepared report on key findings

c) Prepared presentation materials

Advisory Panels on Key Trends
Four advisory panels were established with global thought leaders from around the world.

- Two panels were added from the 2014 study: one for Clients (e.g. meeting planners and tour operators); and one for Community Leaders (e.g. municipal governments and philanthropic sector) to expand insights from these two critical perspectives.
- Changes were also made to the two previous advisory panels: the futurist panel was expanded to include key disruptors (e.g. sharing economy, social media, big data, and mobile/internet of things technology representatives); and the destination marketing panel was expanded to include more international perspectives.

Panel members are identified in Appendix B. These panels were interviewed to identify important trends. The main takeaways from these interviews are provided on pages 7-8.

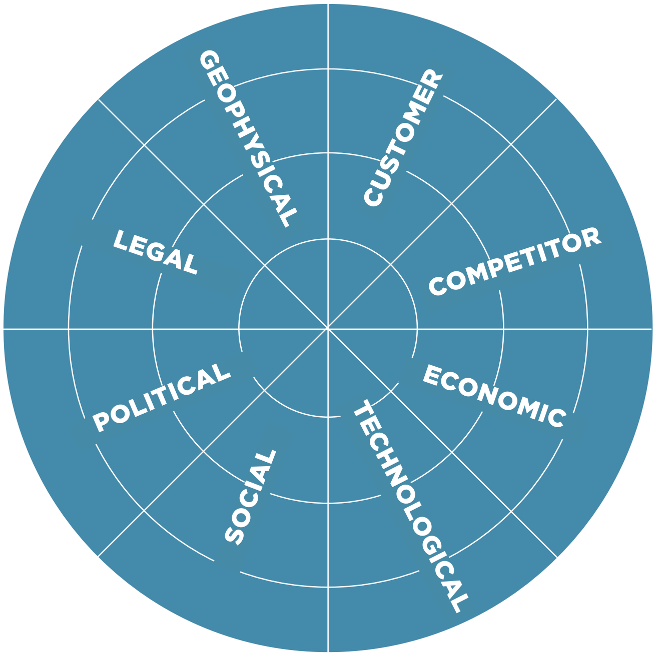
Figure 1:
Advisory Panels

The trends were assessed based on a strategic radar model, utilized in the 2008 and 2014 Futures Studies. Based on feedback from the Advisory Panels and a comprehensive literature review, the list of trends and strategies were updated:

- 34 new trends were added to the previous list established in 2014
- the 15 lowest-ranked trends from 2014 were eliminated from the list, leaving a total number of trends to be considered at 75
- 21 strategies were added to the previous list
- the 14 lowest-ranked strategies were eliminated from the list, leaving a total number of strategies to be considered at 55.

A detailed list of trends and strategies which were added and deleted is included in Appendix C.

Figure 6:
Strategic Radar Model



ADVISORY PANELS

Disruptors

DISRUPTORS PANEL KEY TAKEAWAYS

1. **Speed and scope of disruption impacting everyone.**
   Economic, social, political, climate change means clients and destinations have to operate in ongoing adaptive mode.
2. **Recasting of globalism (increasing isolationism) is impacting consumer behaviour.**
   A rapidly shifting political and social tide is impacting consumer travel demand and their perceptions of destination brands.
3. **Video is the new currency of destination marketing and story-telling.**
   The investment in video content by destination organizations is critically important.
4. **Crowd-sourcing of destination content is increasing geometrically.**
   Curation and aggregation of compelling, relevant content needed for all market segments.
5. **Mobile as the primary channel of visitor engagement.**
   Mobility will have enormous impact on destination marketing strategies.
6. **Harvesting data and business analytics to guide strategy.**
   Success has increasingly become a function of the ability to gather, access and analyze relevant data on a timely basis.
7. **Expanding footprint of the Sharing Economy.**
   A one-time consumer fad is now mainstream within communities and businesses.

COMMUNITY LEADERS PANEL KEY TAKEAWAYS

1. **Knowledge Economy giving way to the Experience Economy.**
   Tourism and business events are all about experiences, and experiences are the dominant force driving human interest and behaviour.
2. **Convergence of tourism/business events and economic development into the role of destination organizations.**
   Successful destinations are collaboratively leveraging destination marketing across multiple economic sectors to gain synergies.
3. **Significant growth of tourism in many destinations is leading to ‘over-tourism’.**
   Increasing travel is forcing destinations to consider strategies that dampen growth.
4. **Search for untouched, authentic places will drive travellers further and further afield.**
   Destinations need to provide experiences where visitors can live like a local.
5. **Democratization of travel has arrived.**
   New and emerging economies, everywhere technology, cheaper airfare, increasing options, and the essence of travel as a basic right, has made travel more and more obtainable.
6. **Place making is growing in importance for communities.**
   Organizations focused on place making are becoming more common place.

Community Leaders

CLIENTS PANEL KEY TAKEAWAYS

Clients

1. **Security is emerging as a destination necessity.**
   Requires a community commitment and investment to make a destination compelling to clients.
2. **Destination travelers seeking deeper and more transformative experiences.**
   Destinations must respond to the trend for travelers to participate in cultural exchanges, connect with nature and historic places, and have meaningful and responsible trips.
3. **Disintermediation is drastically changing the role of the destination organization and the travel trade.**
   Customers increasingly deal directly with the experience provider, and using the "middle man" destination organization or tour operator more selectively.
4. **Hyper-individualization of the delegate experience.**
   Destination organizations need to work with clients to help meet the demand for individualism, including that which happens outside of the event itself.
5. **Events are becoming shorter, with more "whitespace".**
   The formatting and delivery of events is evolving.
6. **Sponsorship is impacting the event industry, particularly in healthcare.**
   Destination organizations need to strategize ways to mitigate this impact by providing value to associations.

DESTINATION LEADERS PANEL KEY TAKEAWAYS

Destination Leaders

1. **Destination readiness and risk adaptation becoming as important for destination organizations as the annual business plan.**
   Successful destinations manage risk with well-established and articulated contingency plans that can be used for competitive advantage.
2. **Increasing need for destination organizations to take an active role in destination management.**
   From engaging in city planning, to curated, authentic, and hyper-personalized product development, destination organizations need to evolve their capabilities.
3. **Destination organizations becoming thought leaders on sustainability with greater involvement in preservation of local experiences.**
   Destination organizations need to encourage responsible travel and strike the right balance for developing local experience and legacies.
4. **Clients are looking for destinations that collaborate as business strategists.**
   Destination organizations need to present value based on economics, business, and knowledge in addition to the appeal of the destination.
5. **Destination organizations engaging in mainstream technology platforms to create more distribution channels.**
   Mobile technology, the internet of things, and virtual reality are affecting all aspects of the destination organization.
6. **Destination organizations have an opportunity to be innovators in community building.**
   Through enabling discussions on destination development, destination organizations can take a leadership in defining how their community evolves as a place to live and work, as well as visit.

SURVEY PROFILE

An extensive survey was sent to industry leaders in April 2017. It covered four areas:

1. **Profile** – Destination organization information
2. **Key Trends** – affecting tourism and the destination organization community
3. **Destination Organization Strategy** – strategies to address major trends and issues
4. **Destination Organization of the Future** – mandate, organization, and business

The response was strong with **433 participants** from **52 countries** participating in the survey. A complete list of participants is included in Appendix D.

The survey cast a wide net, in terms of international coverage as well as size, mandate, and business model of organizations.

Figure 7:
Survey Participant Map

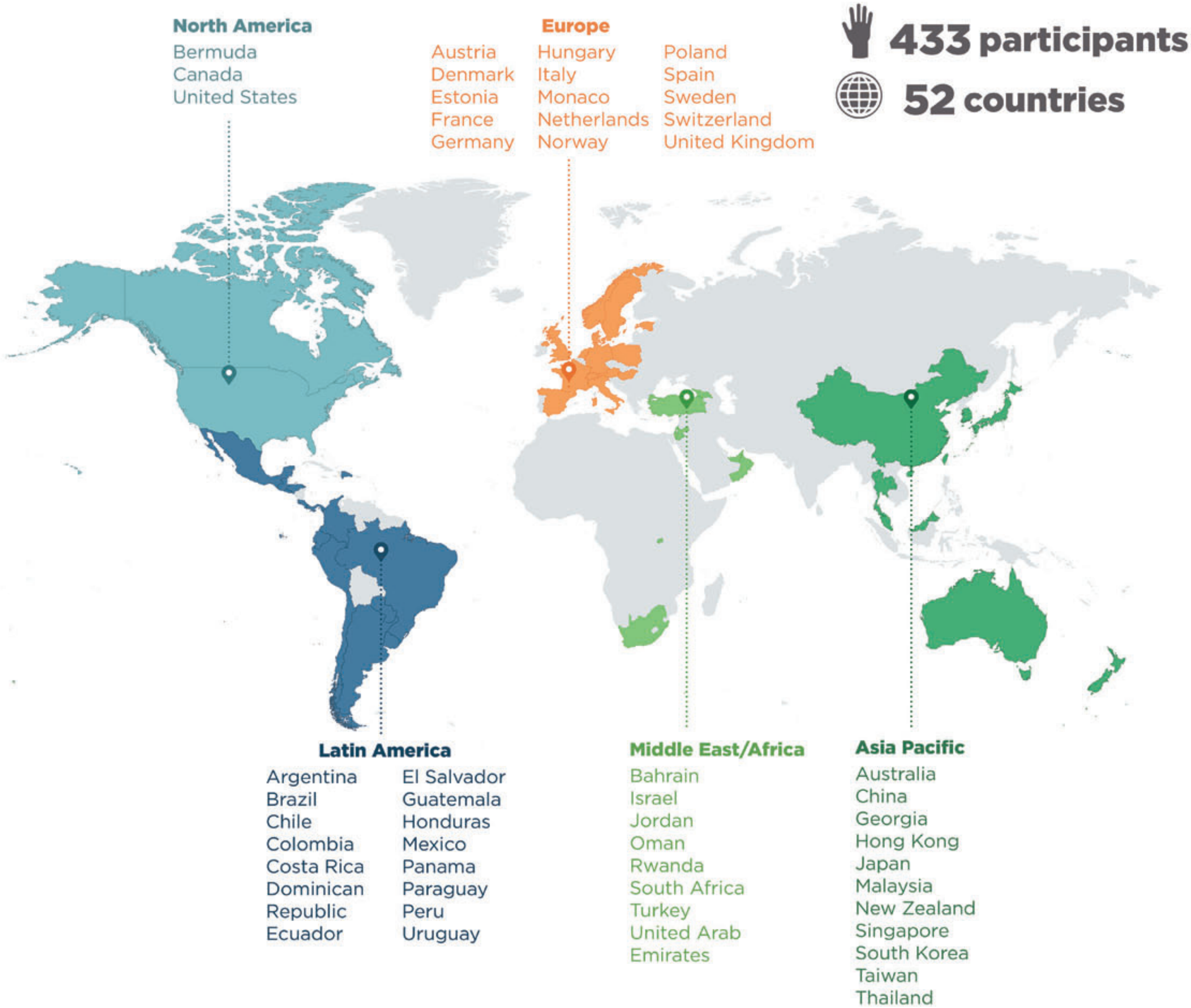


Figure 8:
Organization's Budget Range (US Dollars)

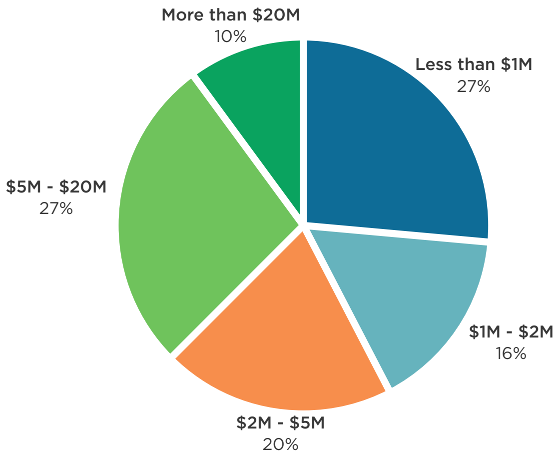


Figure 9:
Market Responsibility

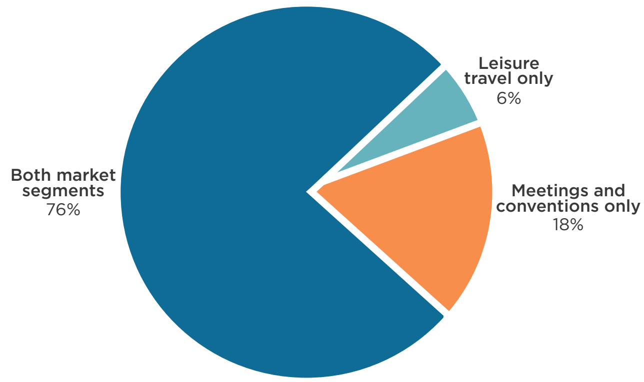
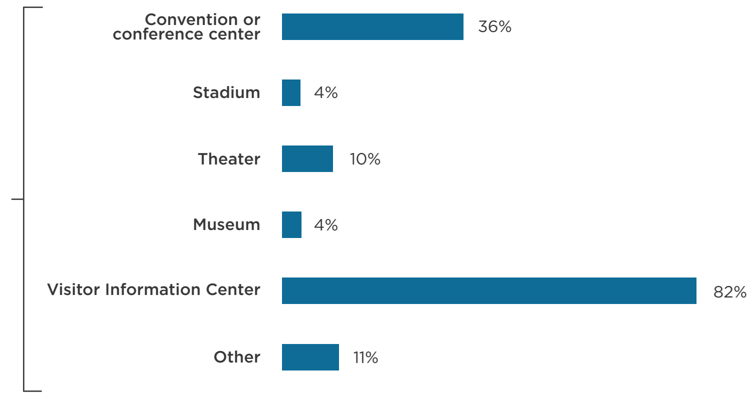


Figure 10:
Responsibility for the Management and Operation of a Community-based Venue (e.g. convention center, stadium, theater, visitor information center)

Figure 11:
Type of Community-based Venue
(Does not add to 100% due to multiple responses)



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Business Model of Organization

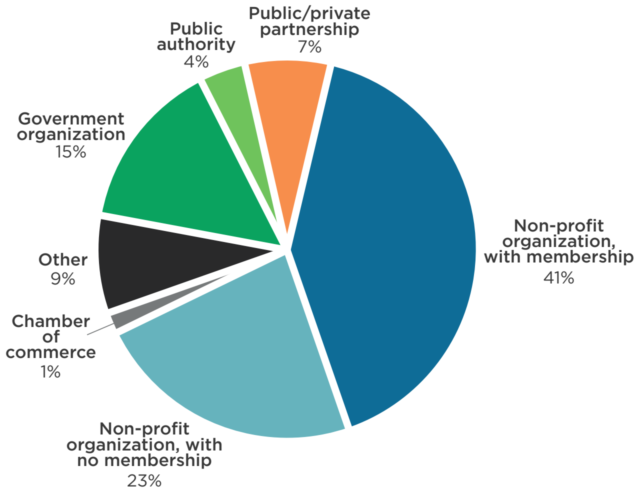
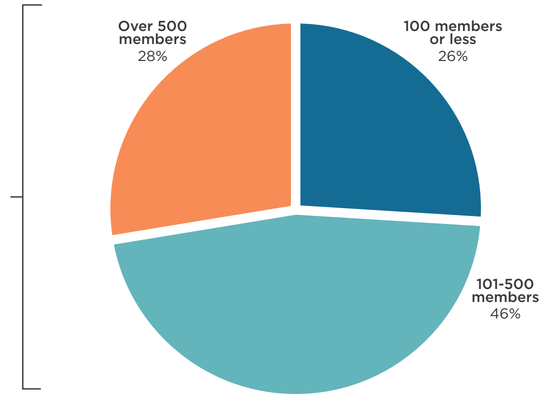


Figure 13:
Average Membership Totals Among Member-Based Organizations



MAJOR FINDINGS

MAJOR FINDINGS - TOP 25 TRENDS

The top 25 trends are listed below. The change in rank compared to the 2014 study is also indicated.

Rank	Trend	Change in Rank*
1	Social media's prominence in reaching the travel market (e.g. Facebook, Pinterest, Twitter, Weibo).	-
2	Content creation and dissemination by the public across all platforms drives the destination brand and experience.	New
3	Customers increasingly seeking authentic and personalized travel experience.	-
4	Mobile platforms and communication will become increasingly important to engage leisure customers from the destination consideration stage through to the trip experience stage.	New
5	Mobile platforms and apps becoming the primary engagement platform for travelers.	↓ -3
6	Video becomes the new currency of destination marketing and story-telling.	New
7	Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations.	New
8	Smart technology (e.g. phones, bag tags and cards) creating new opportunities for innovative new services and processes.	↓ -4
9	Technology enabling faster decision-making by customers.	-
10	Geotargeting and localization becoming more prevalent.	↓ -4
11	Organizations developing strategic alliances in order to leverage resources.	↑ +19
12	Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector.	↑ +2
13	Customers increasingly expect highly curated and customized destination content from destination organizations.	New
14	The brand of a destination becoming a more important factor in travel decisions to consumers.	↓ -1
15	Customers increasingly looking to experience a local's way of life.	↓ -7
16	Air access to a destination is a key challenge in attracting business travelers and meeting planners.	New
17	Travelers demanding more information, control, interaction, and personalization.	↓ -12
18	Hotel taxes increasingly vulnerable to alternative politically based projects.	↓ -7
19	Business events provide their delegates with more authentic, local experiences.	New
20	The industry is moving from e-commerce through to m(mobile)-commerce and ultimately to V(video)-commerce in its communications and transactions with travel consumers.	New
21	Brand identity for destinations becoming more critical in terms of meeting planner perceptions about value and experience.	↓ -14
22	Disruption, in the form of changing business models, terrorism, pandemics, or natural disasters, will increasingly impact how destinations think and act.	New
23	Technology makes travel products and services more transparent to the customer.	New
24	Communities more engaged in the development and management of the destination experience.	New
25	Talent attraction becoming a joint effort of tourism and other economic sectors within communities.	New

**Compared to DestinationNEXT 2014 Futures Study*

TREND DIFFERENCES: REGIONS

There were some notable differences in views on the level of importance and influence of a number of the trends by tourism organizations across world regions. This reflects distinctly different concerns, experiences, funding responses, organizational models, philosophies and approaches.

World Region View & Ranking on Level of Importance and Influence of Industry Trend

TREND	U.S.	Canada	Latin America	Europe	Asia Pacific	Middle East/ Africa
DISRUPTION IMPACTS						
Disruption, in the form of changing business models, terrorism, pandemics, or natural disasters, will increasingly impact how destinations think and act	**MODERATE** (34th)	**LOW** (46th)	**MODERATE** (16th)	**HIGH** (3rd)	**HIGH** (1st)	**HIGH** (8th)
SAFETY & SECURITY CONCERNS						
Safety & security at destinations becoming a brand differentiator	**LOW** (56th)	**LOW** (38th)	**HIGH** (2nd)	**HIGH** (9th)	**HIGH** (7th)	**HIGH** (8th)
Security risks hampering travel decisions	**LOW** (46th)	**LOW** (56th)	**MODERATE** (29th)	**HIGH** (10th)	**MODERATE** (18th)	**HIGH** (2nd)
FUNDING ISSUES						
Hotel taxes increasingly vulnerable to alternative politically based projects	**HIGH** (6th)	**MODERATE** (14th)	**LOW** (67th)	**LOW** (75th)	**LOW** (74th)	**LOW** (68th)
Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector	**HIGH** (7th)	**MODERATE** (19th)	**MODERATE** (32nd)	**LOW** (62nd)	**LOW** (43rd)	**LOW** (59th)
TOURISM & BUSINESS EVENTS AS ECONOMIC CATALYSTS						
Governments dealing with tourism from an integrated, multi-departmental perspective, focused on economic development	**LOW** (37th)	**MODERATE** (16th)	**HIGH** (6th)	**LOW** (63rd)	**LOW** (46th)	**HIGH** (8th)
Business events shifting to be regarded as agents of long-term economic development for communities through building knowledge and advancing investment	**LOW** (55th)	**LOW** (49th)	**HIGH** (7th)	**MODERATE** (17th)	**MODERATE** (21st)	**HIGH** (8th)
CHINA AS DOMINANT PLAYER						
Asia Pacific, in particular China, becoming a dominant player both as a source market and as a destination	**LOW** (68th)	**MODERATE** (35th)	**LOW** (66th)	**MODERATE** (11th)	**HIGH** (9th)	**HIGH** (2nd)
ROLE OF ARTIFICIAL INTELLIGENCE						
Artificial intelligence will become increasingly important in managing the end-to-end customer/destination relationship from trip consideration through to on-site visitation	**LOW** (45th)	**MODERATE** (11th)	**LOW** (54th)	**HIGH** (1st)	**LOW** (49th)	**LOW** (44th)

TREND DIFFERENCES: MANDATE

Similarly, there were key differences in views among destination organizations serving specific market segments on the impact of some of the trends. Some common patterns have been found in the views and rankings in specific world regions and those with specific mandates, influenced in part by greater concentrations of meetings and conventions organizations in Europe and Asia, and higher proportions of leisure only and hybrid organizations in the U.S. and Canada.

	Specific Destination Organizations' View & Ranking on Level of Importance & Influence of Industry Trend		
TREND	**Both Market Segments**	**Leisure Travel Only**	**Meetings & Conventions Only**
SAFETY & SECURITY CONCERNS			
Safety & security at destinations becoming a brand differentiator	**LOW** (50th)	**LOW** (56th)	**HIGH** (1st)
Security risks hampering travel decisions	**LOW** (46th)	**LOW** (50th)	**MODERATE** (13th)
FUNDING ISSUES			
Hotel taxes increasingly vulnerable to alternative politically based projects	**MODERATE** (28th)	**MODERATE** (28th)	**LOW** (54th)
Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector	**MODERATE** (12th)	**HIGH** (4th)	**MODERATE** (34th)
BUSINESS EVENTS AS ECONOMIC CATALYSTS			
Business events shifting to be regarded as agents of long-term economic development for communities through building knowledge and advancing investment	**LOW** (52nd)	**LOW** (49th)	**HIGH** (2nd)
AIR ACCESS			
Air access to a destination is a key challenge in attracting business travelers and meeting planners	**MODERATE** (17th)	**LOW** (45th)	**HIGH** (8th)
ROLE OF BUSINESS ANALYTICS & DATA SCIENCE			
Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations	**HIGH** (7th)	**MODERATE** (13th)	**HIGH** (4th)
ROLE OF VIDEO IN MARKETING & STORYTELLING			
Video becomes the new currency of destination marketing and story-telling	**HIGH** (6th)	**HIGH** (1st)	**MODERATE** (16th)

FUTURE MAP

The top 25 trends were plotted on a grid that assessed each trend based on:

- Degree to which the trend will have a positive or negative impact on the destination organization as well as the destination itself
- Degree of control the destination organization has to influence this trend

Rather than a conventional SWOT analysis, this approach helps organizations focus on the trends and issues that they can impact or affect (e.g. the upper quadrants of the grid where a destination organization can exploit opportunities and mitigate threats).

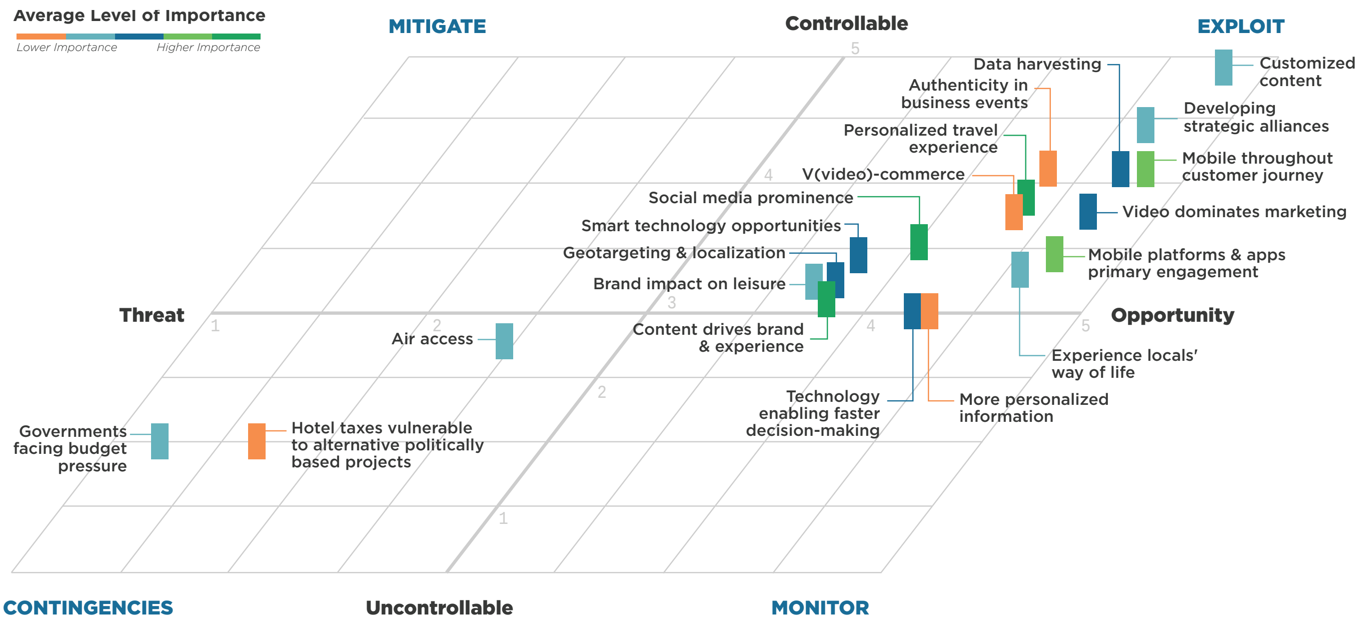
The analysis identified a number of opportunities to exploit (e.g. upper right quadrant of the grid). They revolved around the following areas:

- Developing customized content by the destination organizations
- Transitioning from conventional marketing strategies towards video, social media, and smart technology
- Developing strategic alliances within the destination's region

There were a few key takeaways that members of the Advisory Panel had highlighted that were not reflected in this year's top 25 trends. These include:

- Playing a greater role in the economic development of the destination, which was a core takeaway of the DestinationNEXT 2014 Futures Study - Future Map
- Sustainability of the destination
- Preventing over-tourism through responsible destination management

Figure 2:
DestinationNEXT 2017 Future Map



MAJOR FINDINGS - TOP 25 STRATEGIES

The top 25 strategies are listed below. The change in rank compared to the 2014 study is also indicated.

Rank	Strategy	Change in Rank*
1	My organization will invest more effort and resources into video content to market the destination.	New
2	My organization will focus significant attention to content creation and dissemination strategies.	New
3	My destination will focus on developing authentic experiences for the customer.	New
4	My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.	New
5	My organization will play more of a central role in advocacy in my destination.	↓ -2
6	My organization will enhance our engagement with the local community to manage future tourism considerations.	New
7	My destination will develop strategies to protect what we have while attracting events and visitation to our community.	New
8	My organization will design digital customer engagement primarily around mobile platforms.	↑ +2
9	My organization will place greater emphasis on engaging with customers in two-way conversations.	↓ -7
10	My organization will be more involved in broader economic development projects and initiatives.	↓ -6
11	My organization will develop new strategies to refocus on the millennial market.	↓ -4
12	The economic impact of tourism (and conventions) will be better understood in my destination.	↑ +1
13	My organization will connect visitor experience with the quality of life of residents in my community.	↓ -8
14	My organization will form more strategic alliances outside the DMO industry.	↓ -2
15	My organization will adopt operating standards and consistent measures of performance with other organizations.	↓ -9
16	My organization will agree to a uniform methodology with other DMOs to measure economic impact.	↓ -8
17	My organization will put a greater emphasis on market segmentation.	↓ -8
18	My organization will take on a greater role as cultural champion of my destination.	↓ -7
19	My organization will invest more effort in scanning the market for business intelligence.	↑ +1
20	My organization and industry will take a more active role in political and legislative issues impacting events.	New
21	My organization will engage more closely with non-traditional stakeholders in my destination.	↓ -3
22	My destination will pay close attention to safety and security as a strategic consideration in our future planning.	New
23	My organization will participate more in building platforms to improve visitor experience.	↓ -9
24	My organization will acquire competencies and skillsets to effectively compete in a disruptive economy.	New
25	My organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination.	New

**Compared to DestinationNEXT 2014 Future Study*

STRATEGY DIFFERENCES: REGIONS

There were numerous major differences in views among tourism organizations across world regions on the level of importance and impact of the destination strategies. These key differences were found in the areas of: destination management; market development; business events; funding; and management, as the table below illustrates.

World Region View & Ranking on Level of Importance & Influence of Destination Strategy

STRATEGY	U.S.	Canada	Latin America	Europe	Asia Pacific	Middle East/ Africa
DESTINATION MANAGEMENT						
My organization will enhance our engagement with the local community to manage future tourism considerations	**HIGH** (5th)	**HIGH** (7th)	**MODERATE** (28th)	**HIGH** (7th)	**LOW** (42nd)	**MODERATE** (18th)
My organization will be more involved in broader economic development projects and initiatives	**HIGH** (10th)	**MODERATE** (19th)	**MODERATE** (15th)	**MODERATE** (21st)	**HIGH** (2nd)	**LOW** (29th)
My organization will connect visitor experience with the quality of life of residents in my community	**MODERATE** (13th)	**LOW** (37th)	**LOW** (33rd)	**HIGH** (8th)	**LOW** (42nd)	**LOW** (27th)
My destination will pay close attention to safety and security as a strategic consideration in our future planning	**MODERATE** (25th)	**LOW** (43rd)	**HIGH** (10th)	**MODERATE** (12th)	**HIGH** (9th)	**HIGH** (2nd)
My organization will consider ways to measure the longer-term social, cultural and environmental impacts of tourism and business events	**LOW** (36th)	**LOW** (31st)	**LOW** (34th)	**MODERATE** (18th)	**HIGH** (4th)	**MODERATE** (18th)
MARKET DEVELOPMENT						
My organization will work more closely with airlines to generate business for my destination	**LOW** (47th)	**MODERATE** (16th)	**HIGH** (8th)	**MODERATE** (27th)	**MODERATE** (21st)	**HIGH** (7th)
My organization will invest greater resources into attracting Asia Pacific opportunities	**LOW** (54th)	**MODERATE** (20th)	**LOW** (55th)	**LOW** (44th)	**HIGH** (1st)	**MODERATE** (29th)
BUSINESS EVENTS						
My organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination	**LOW** (36th)	**MODERATE** (24th)	**MODERATE** (14th)	**HIGH** (6th)	**HIGH** (2nd)	**HIGH** (1st)
My destination will work closely with associations to help them achieve their long-term legacy objectives	**LOW** (51st)	**LOW** (55th)	**HIGH** (7th)	**MODERATE** (26th)	**MODERATE** (21st)	**HIGH** (1st)
FUNDING						
My organization will have to secure new revenue sources to maintain current funding levels	**LOW** (46th)	**LOW** (47th)	**MODERATE** (16th)	**HIGH** (2nd)	**LOW** (42nd)	**LOW** (52nd)
Funding for my organization will be directly tied to performance criteria	**LOW** (45th)	**MODERATE** (22nd)	**LOW** (54th)	**LOW** (30th)	**HIGH** (6th)	**MODERATE** (29th)
MANAGEMENT						
My organization will acquire competencies and skillsets to effectively compete in a disruptive economy	**MODERATE** (23rd)	**MODERATE** (14th)	**LOW** (34th)	**HIGH** (8th)	**MODERATE** (31st)	**LOW** (49th)
My organization will build our capacity as curators of the destination experience, while placing less emphasis on more traditional tourism promotions	**LOW** (28th)	**HIGH** (8th)	**LOW** (31st)	**MODERATE** (12th)	**MODERATE** (18th)	**LOW** (55th)
My organization will have tools in place to manage large and complex data (or "big data")	**LOW** (34th)	**LOW** (45th)	**LOW** (42nd)	**HIGH** (8th)	**LOW** (47th)	**LOW** (42nd)

STRATEGY DIFFERENCES: MANDATE

Distinct differences in views were also found among destination organizations serving specific market segments on the level of importance and influence of some of the destination strategies. These noted differences in destination strategy have been grouped below into 5 specific categories: destination marketing & customer engagement; meetings & conventions strategies; business intelligence; destination management; and destination organization funding.

Specific Destination Organizations View & Ranking on Level of Importance & Influence of Destination Strategy

STRATEGY	Both Market Segments	Leisure Travel Only	Meetings & Conventions Only
DESTINATION MARKETING & CUSTOMER ENGAGEMENT			
My organization will invest more effort and resources into video content to market the destination	**HIGH** (1st)	**HIGH** (1st)	**MODERATE** (19th)
My destination will develop strategies to protect what we have while attracting events and visitation to our community	**HIGH** (7th)	**HIGH** (3rd)	**MODERATE** (21st)
My organization will design digital customer engagement primarily around mobile platforms	**HIGH** (8th)	**HIGH** (4th)	**MODERATE** (26th)
MEETINGS & CONVENTIONS STRATEGIES			
My organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination	**MODERATE** (28th)	**LOW** (52nd)	**HIGH** (1st)
My destination will work closely with associations to help them achieve their long-term legacy objectives	**LOW** (47th)	**LOW** (54th)	**HIGH** (3rd)
BUSINESS INTELLIGENCE			
My organization will invest more effort in scanning the market for business intelligence	**MODERATE** (19th)	**LOW** (46th)	**HIGH** (4th)
DESTINATION MANAGEMENT			
My destination will pay close attention to safety and security as a strategic consideration in our future planning	**MODERATE** (22nd)	**LOW** (43rd)	**HIGH** (10th)
My organization and destination has a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics	**MODERATE** (30th)	**MODERATE** (22nd)	**LOW** (50th)
My organization will take on a greater role as cultural champion of my destination	**MODERATE** (16th)	**HIGH** (9th)	**LOW** (48th)
FUNDING			
My organization will have to secure new revenue sources to maintain current funding levels	**LOW** (44th)	**LOW** (41st)	**MEDIUM** (12th)

ADDITIONAL SURVEY QUESTIONS

The survey also asked several critical strategic questions about organizations and the future of our industry. There were major differences in views among participants across world regions.

Figure 14:
If you were to start/establish a new destination organization, what would the primary role be?

Rank	Current Role	Avg.	United States	Canada	Latin America	Europe	Asia Pacific	Middle East/ Africa
1	Brand/Marketing	2.88	1	1	2	1	2	1
2	Destination and product development	3.26	2	2	1	4	4	2
3	Meetings and convention sales	3.48	3	2	3	2	1	3
4	Broader economic development	3.70	4	4	6	6	2	6
5	Destination information resource	3.73	6	8	4	3	5	6
6	Industry advocate and association leader	3.75	6	7	5	5	10	6
7	Leisure sales (group tour and independent)	3.82	5	5	10	9	6	9
8	Visitor experience servicing	3.84	8	8	8	7	7	9
9	Major event partner/ developer	3.88	9	6	7	9	7	4
10	Convention services	3.94	10	10	9	8	10	4
11	Venue manager/ operator	3.98	11	10	11	9	7	9

Figure 15:
Do you expect a change in your business model during the next five years? (Participants that marked "Yes")

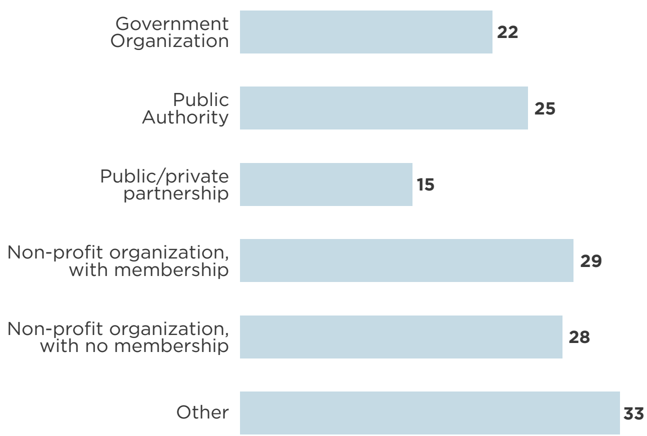


Figure 16:
Please rank the top THREE largest revenue sources in your current annual operating budget.

Rank	Current Role	Avg.	United States	Canada	Latin America	Europe	Asia Pacific	Middle East/ Africa
1	Room tax	2.37	1	4	2	6	10	5
2	Direct government budget allocation	3.25	5	1	3	1	1	1
3	Membership dues	3.32	3	5	1	2	2	3
4	Sponsorship/ partnerships/programs	3.33	2	2	4	3	4	4
5	Other revenue	3.64	4	6	5	7	4	2
6	Tourism improvement district funding (business levy)	3.81	6	9	9	10	7	6
7	Destination marketing fee (consumer levy)	3.90	9	3	12	7	12	6
8	Venue rentals and associated revenues	3.90	10	9	6	5	3	6
9	Destination marketing services (e.g. research, event mangement)	3.91	8	7	7	7	6	6
10	Sales commissions	3.92	11	8	8	3	10	6
11	Food & beverage tax	3.94	7	9	9	10	7	6
12	Car rental tax	3.97	11	9	11	10	7	6

Figure 17:
What will your organization's expected measure of success be 5-10 years from now?

Rank	Current Role	Avg.	United States	Canada	Latin America	Europe	Asia Pacific	Middle East/ Africa
1	Economic impact of tourism (e.g. jobs, taxes, spending)	2.97	1	1	1	1	1	2
2	Room-nights generated	3.42	2	4	2	10	3	6
3	Hotel performance metrics (e.g. occupancy, RevPAR)	3.51	3	2	9	6	8	8
4	Marketing ROI	3.54	4	5	5	2	4	2
5	Overnight visitation	3.67	5	3	6	7	4	1
6	Leads/referrals to business	3.74	6	7	3	2	2	10
7	Visitor satisfaction	3.81	7	9	4	4	4	6
8	Social media metrics (e.g. unique views, Facebook likes, Tweets)	3.86	8	6	10	11	11	2
9	Other	3.91	9	8	13	8	8	2
10	Membership satisfaction	3.91	11	9	8	4	8	8
11	Venue operating profits	3.93	13	9	7	9	7	10
12	Media stories	3.95	10	9	12	11	11	10
13	Visitor servicing	3.97	12	9	11	11	11	10

RE-ENGINEERING DESTINATION ORGANIZATIONS

RE-ENGINEERING DESTINATION ORGANIZATIONS

Transformational Opportunities

In the first phase of DestinationNEXT, three transformational opportunities were identified for destination organizations to be effective and relevant in the changing tourism and business events world:

1. **Sales & marketing:** shifting from broadcast to engagement and transactional to strategic
2. **Destination management:** playing a greater role in product development
3. **Business model:** greater emphasis on partnerships and collaboration

Each of these areas require serious attention and commitment.

The first two transformational areas relate to the core strategy of the organization. These concepts address the changing environment in which destination organizations operate. Much of the DestinationNEXT analysis has been focused on the strategies that destination organizations should have in place to stay in front of the marketplace, and the industry it represents. The third transformational area relates to organization design and structure. Clear, well-understood roles and relationships are key to how well an organization performs. They are the blueprint for formal expectations and exchanges among internal players (board, executives, managers, employees) and external constituencies.

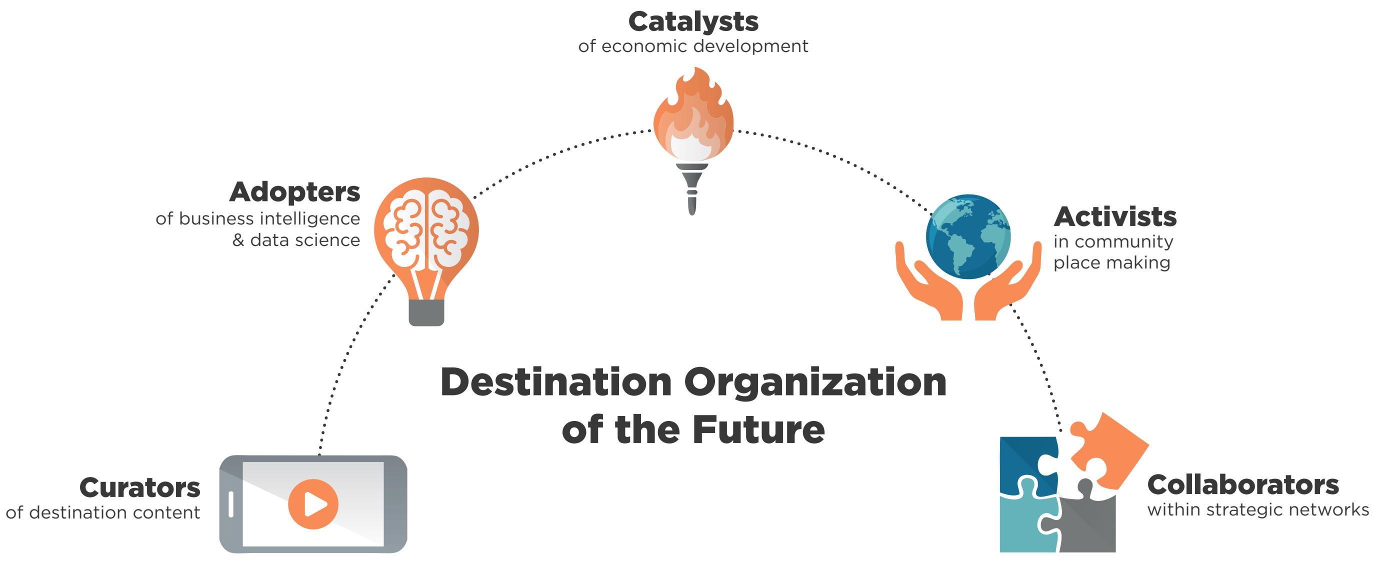
Our research identified five key roles we believe destination organizations should focus on in the future. These roles are: Curators; Adopters; Catalysts; Activists; and Collaborators. Organizations need to develop plans for not only what they intend to do (strategy) but how they will do it (structure). These roles, in some cases, will be a significant departure from the current reality and will require identifying and nurturing core competencies.

Destination organization leaders must not only have the courage and foresight to make crucial choices about the strategic priorities that impact marketplace performance. They also have to look internally at their governance and management competencies to ensure their organization has the structural alignment and skill sets to effectively implement their choices. Such an evaluation requires a rethinking and possible re-engineering of how they are designed to achieve success.

These leadership choices on organization design are every bit as complex (and often more challenging) as many of the identified marketplace opportunities and issues. But strategy without proper structure is incomplete and ultimately ineffective.

Or as legendary GE Chair and CEO Jack Welch so aptly phrased it: “If the rate of change on the outside exceeds the rate of change on the inside, then the end is near.”

Figure 3:
Re-engineering Destination Organizations



CURATORS

Curators of Destination Content

Historically, destination organizations positioned themselves as the gatekeeper of the destination messaging channel. They rarely generated proprietary content, relying instead on stakeholders, advertising agencies, third-party publishers or journalists to generate the destination story content for the channel they managed.

The emergence of ubiquitous access to information and content publishing tools has now created a paradox for consumers…and an opportunity for destination organizations. On one hand consumers find themselves in an endlessly expanding ocean of content. Yet, they increasingly struggle to find exactly what they are looking for to help them make an informed decision. And often the content does not project the authentic essence of the destination.

Consumer content consumption preferences have also shifted significantly. More than 60% of daily search traffic is now mobile generated and video content is expected to make-up over 70% of internet traffic in 2017 (per Syndacast), and the travel purchase journey has become a multi-media conversation. This has prompted companies like Facebook to align their entire user engagement experience around mobile video consumption.

With ubiquitous access to information channels and content publishing tools, the lines between content creator and consumer are effectively blurred. And with the proliferation of multiple content delivery platforms/formats, there is no longer a definitive travel information channel. The marketplace is now a conversation and content is indeed king.

The traditional marketplace messaging channel in destination marketing has been disrupted. Consumers are looking for ready access to consistently compelling and relevant content about authentic destination experiences to make their search for travel guidance easier and less risky.

Destination organizations need to evolve their role from information channel manager to content curator and story-teller. They need to focus on development and delivery of compelling content in formats and on platforms that visitors are embracing. This will mean a shift from static to dynamic media formats like video delivered in a mobile environment instead of the desktop. A key element will be the requirement for destination organizations to acquire the necessary content development competencies as part of their organizations.

> *Consider that every minute of the day:*
>
> - *3.5 million search queries are made on Google (60% are made on mobile devices)*
> - *4.1 million videos are viewed on YouTube (Consumers prefer video 4:1 over print to learn about a product or service)*
> - *46,200 images are posted on Instagram (48% of users use the platform to help choose vacation destinations)*
> - *2,853 new mobile phones are activated in the U.S. alone*

Sources: Animoto, MissTravel, Flurry, @lorilewis, @officlallychadd

Strategies from the Top 25 that Defined the 'Curators of Destination Content' Role

1 My organization will invest more effort and resources into video content to market the destination.

2 My organization will focus significant attention to content creation and dissemination strategies.

4 My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.

9 My organization will place greater emphasis on engaging with customers in two-way conversations.

20 My organization will participate more in building platforms to improve visitor experience.

ADOPTERS

Adopters of Business Intelligence and Data Science

Nearly ten years ago, Google economist Hal Varian stressed the importance of business analytics. With data produced now being reported in exabytes, zettabytes, and yottabytes, it is crucial that organizations develop strategies for wrapping their arms around the seemingly endless explosion of data.

Over the years, destination organizations have resisted investing in business analytic capabilities, instead relying on intuitiveness and experience to make strategic decisions. Granted that not every decision should be filtered through a data lens, it is extremely important for destination organizations to improve their business analytics capabilities. It certainly is encouraging to see that six of the top 25 future strategies are related to this role.

Managing and analyzing data involves the systematic collection and exploration of data to assist an organization to make strategic decisions and gain competitive advantage. Done right it will infuse confidence in an organization to be more proactive and innovative in its approach.

Destination organizations should consider a 'whole of business' framework that identifies opportunities to use data analytics to drive strategic decision-making regarding key audiences – whether it is consumers, travel trade customers, meetings and conventions customers, media, and/or the membership/local stakeholders. The business value of using business intelligence and data science is to improve visitor growth and revenue through enhancing customer selection capabilities.

"It is a capital mistake to theorize before one has data. Insensibly, one begins to twist the facts to suit theories, instead of theories to suit facts."

- Sherlock Holmes
Private Investigator

"I keep saying that the sexy job in the next 10 years will be statisticians."

- Hal Varian
Chief Economist, Google

Strategies from the Top 25 that Define the 'Adopters of Business Intelligence and Data Science' Role

- 8 My organization will agree to a uniform methodology with other DMOs to measure economic impact
- 11 My organization will develop new strategies to refocus on the millennial market.
- 15 My organization will adopt operating standards and consistent measures of performance with other DMOs.
- 16 My organization will agree to a uniform methodology with other DMOs to measure economic impact.
- 17 My organization will put a greater emphasis on market segmentation
- 19 My organization will invest more effort in scanning the market for business intelligence.

CATALYSTS

Catalysts of Economic Development

As a global economic leader, tourism generates investment income, export earnings and domestic and international trade for destinations. Close to 10% of the world's gross domestic product (GDP) is derived from the tourism industry. Expansion of leisure travel and business events is eagerly pursued by thousands of destinations around the world, though it is often viewed and strategized in isolation from other economic priorities.

Communities, and the agencies that represent them in helping to grow their economies, are moving toward a more integrated approach. For example, Houston First was created in 2011 to bring together various agencies, including Houston CVB, under one roof. Similar to Houston, communities should apply a holistic approach to their economic growth strategies by involving all sectors in development.

A recently published study by Ramphul Ohlan of the Maharshi Dayanand University in Haryana, India, offers justification for governments to invest in the tourism industry as a means of invigorating economic growth over the long run. The research, which was conducted in India, shows that tourism can be depended upon to stimulate economic prosperity and, for this reason, policy makers ought to give careful consideration toward encouraging inbound tourism.

Destination organizations have a critical role to play in stimulating economies and influencing politicians and policy makers – by being catalysts to help their communities grow trade and foreign exchange, increase investment in new infrastructure, create jobs, build knowledge, and generate earnings.

> ***"We have identified tourism as the catalyst that is going to drive South Africa... into prosperity. Tourism is such a wonderful sector – show me a sector and I will show you how tourism contributes to it."***
>
> **- Sisa Ntshona,**
> *CEO, Tourism South Africa*
>
> ***Communities benefit from tourism through "business investments, inclusive growth, entrepreneurial and innovative stimulants, community pride, educational expansion through experience, and most of all, a better understanding of other cultures and heritage to engender a more peaceful and positive future."***
>
> **- Helen Marano**
> *Senior Vice-President, Government & Industry Affairs, World Travel and Tourism Council*

Strategies from the Top 25 that Defined the 'Catalysts of Economic Development' Role

5 My organization will play more of a central role in advocacy in my destination.

10 My organization will be more involved in broader economic development projects and initiatives.

13 The economic impact of tourism (and conventions) will be better understood in my destination.

23 My organization and industry will take a more active role in political and legislative issues impacting events.

ACTIVISTS

Activists in Community Place Making

Destination organizations have often spoken in recent years about the need to shift to a destination management role to help evolve the holistic development of the destination, the community, and its sense of place. Yet, too few destination organizations are actively involved in community place making, and are not directly influencing and driving key community initiatives with their local stakeholders. To date, only a small number of destination organizations world-wide have developed or are currently developing proactive tourism master plans in partnership with their local governments, community organizations and institutions, business community, other industry and local partners, and local residents.

It is clear from the highly ranked strategies listed on this page that more destination organizations are now recognizing the immediacy of transitioning from traditionally indirect or more passive roles in community place making to direct, active and integrated roles. Yet, it is also clear this transition needs to happen with a greater sense of urgency.

Direct destination organization involvement and partnership in community place making is key to enabling the cultivation, curation and presentation of a rich array of authentic destination experiences for visitors. This outcome plays a core role in the vitality and economic sustainability of the destination. Yet within destination and community place making, it is equally critical for destination organizations to also play an activist and central role in protecting the essence and positive future of place – a destination's social norms, its cultural values, its natural and built environments, and its established way of life.

Actively balancing the development of the visitor economy, with partnered strategies on socio-cultural sustainability, environmental sustainability, and the retention of quality of life for residents, will become increasingly important community place making roles for destination organizations now and in future years.

"Destination marketing organizations are mostly missing in action in community place-making discussions."

- Christopher B. Leinberger
Charles Bendit Distinguished Scholar and Research Professor of Urban Real Estate
George Washington University

"Destination management is the new destination marketing."

- Chris Fair
President, Resonance Consulting

Strategies from the Top 25 that Defined the 'Activists in Community Place Making' Role

3 My destination will focus on developing authentic experiences for the customer.

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

7 My destination will develop strategies to protect what we have while attracting events and visitation to our community.

12 My organization will connect visitor experience with the quality of life of residents in my community.

18 My organization will take on a greater role as cultural champion of my destination.

22 My destination will pay close attention to safety and security as a strategic consideration in our future planning.

COLLABORATORS

Collaborators within Strategic Networks

A strategic network involves lateral and vertical ties to stakeholders inside and outside of the firm. As Ibarra and Hunter state, strategic networking is the ability to marshal information, support, and resources from one sector of a network to achieve results in another.

It is crucial that destination organizations in the future build multiple networks, many of which should be beyond the traditional grouping of tourism businesses that have long been the characteristic of this industry. For example, establishing strategic relationships with economic agencies, universities and other business sectors. And, importantly, creating alliances with conventions and travel trade customers.

Destination organization customers are more interested in establishing strategic relationships rather than transactional relationships with the destinations they choose. Destinations are also co-creating signature events to highlight key industries or attributes. These shifts require different engagement strategies by destination organizations in and with their communities.

Destination organizations should proactively build networks to help deliver on the customers' desired outcomes. A commitment to this level of engagement changes the competitive dialogue and if delivered successfully, can move market share.

Co-creation is the emerging model across sectors, either among organizations and customers, corporations and social entrepreneurs, or different non-traditional stakeholders working together more effectively to solve key challenges. It is a business strategy focusing on customer experience and interactive relationships. Co-creation allows and encourages a more active involvement from the customer to create a value-rich experience.

If a co-creation strategy is successfully achieved, this will better position the destination organization within the community to impact economic and social development while reinforcing the value and contribution of tourism and business events. This engagement will also allow for opportunities to hear and understand the local population's attitudes and concerns related to the visitor industry, and generate a more relevant destination organization in the community.

> *"By looking for partnerships and collaborating externally, companies are able to innovate much more quickly and even create solutions to problems that may not be prevalent issues yet. Collaboration is no longer just a strategy: it is the key to long-term business success and competitiveness. Businesses that realize this sooner rather than later will be the ones who win the game and succeed in the new global economy."*
>
> **- Bob Mudge**
> *President of Consumer and Mass Business at Verizon*

Strategies from the Top 25 that Defined the 'Collaborators within Strategic Networks'

- 14 My organization will form more strategic alliances outside the industry.
- 21 My organization will engage more closely with non-traditional stakeholders in my destination.
- 25 My organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination.

SCENARIO MODEL

SCENARIOS

In 2014, an exciting new scenario model was developed. Ground-breaking research determined two critical success factors for destinations:

- strength of destination
- level of community support and engagement.

The intersection of these two major independent factors generates four dramatically different scenarios, outlined below. Each destination organization can find itself primarily in one of these quadrants.

DestinationNEXT Scenario Model

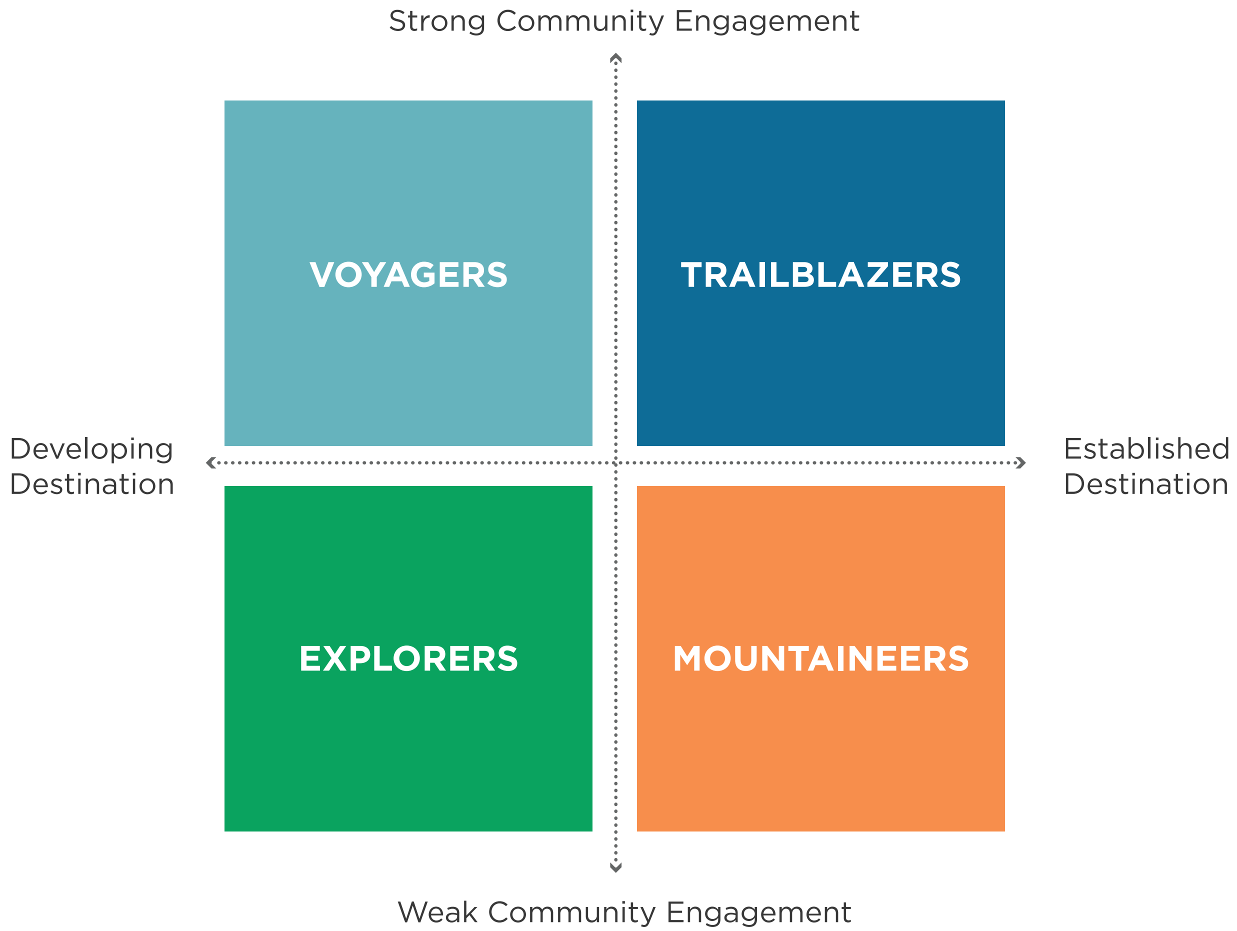


Figure 4:
Scenario Model

In 2015, the Destination & Travel Foundation funded additional work to develop an online diagnostic tool to assess individual destinations. A sophisticated model was developed based on 10 variables defining each success driver.

DESTINATION STRENGTH

Figure 18: Destination Strength Variables

DESTINATION STRENGTH SCENARIO CHARACTERISTICS

Developing Destination

- Destination marketing plan in place
- Markets and customer segments being tested and explored
- Medium awareness of the destination
- Some concerns on transportation access
- Mixed quality and quantity of facilities and products
- Some improvements in customer servicing needed
- Business results lag behind some key competition
- Need for more activities and events
- Future business booking forecast is moderate
- Destination organizations developing its organization capacity

Established Destination

- Long-term destination marketing plan
- Diverse markets and customer segments
- High awareness of the destination
- Convenient to get to and move around
- Good scope of infrastructure and products
- Ease of doing business
- Long-term performance success
- Range of activities and events
- Foundation of business on the books into the future
- Destination organization is highly respected and accountable

COMMUNITY SUPPORT & ENGAGEMENT

Figure 19: Community Support & Engagement Variables

COMMUNITY SUPPORT & ENGAGEMENT SCENARIO CHARACTERISTICS

Strong Community Engagement

- Long-term destination management strategies
- Political support
- Local resident appreciation for tourism
- High industry participation
- Businesses outside of tourism engaged with the industry
- High standards of customer servicing
- Good alignment of partners and stakeholders
- Industry respects natural and cultural assets in community
- Appropriate level of resources to market and manage
- Destination organization is at the table on local issues and plans

Weak Community Engagement

- Lack of a destination management plan
- Political support comes and goes
- Local residents not aware of tourism's importance
- Industry inconsistent in their involvement
- Limited connection to businesses outside of tourism industry
- Customer service quality varies from place to place
- Lack of an integrated approach with partners and stakeholders
- Industry concerned only with its own needs
- Lack of funding to market and manage destination
- Destination organizations have little involvement with the community

FINDINGS TO DATE

The Scenario Model is now being used as a critical input into many planning and engagement initiatives by destination organizations around the world. Over 100 destinations have already completed a detailed assessment.

The feedback from communities which have completed the DestinationNEXT assessment has been very positive. Research from this Futures Study Update has reconfirmed the critical importance of the two success drivers in the current model. If anything, community support & engagement has become even more important in recent years.

Each destination faces a different set of issues which need to be addressed. However, the most common problem areas facing many destinations are presented below:

Figure 20:
DestinationNEXT Assessment Participants

325
destinations from 18 countries

104
detailed assessments completed in 10 countries

50
underway or planned, including 4 other countries

65
in discussions, including 14 other countries

DESTINATION STRENGTH

Brand
- Iconic attractions & events
- International readiness

Convention & Meeting Facilities
- Necessary conference, meeting, and trade show facilities for next 10 years
- Conference center branding

Mobility & Access
- Road capacity
- Public transportation
- Walkability & recreation trails

Air Access
- Air service

COMMUNITY SUPPORT & ENGAGEMENT

Funding Support & Certainty
- Sufficient revenue sources
- Stable funding

Workforce
- Attract & retain a high-quality workforce
- Cost increases

Local Community Support
- Understanding & perception of residents, businesses, and media
- Lack of tourism destination plan

CONCLUSION

DestinationNEXT is intended to be the strategic roadmap for destination organizations in terms of what we do and how we do it... Given the turbulent world in which we live, this will always be an ongoing debate and process.

It is our hope that DestinationNEXT is not seen as a series of reports but rather an ongoing dialogue about critical issues affecting our industry and potential actions and strategies to address them. Additional work is still required to maximize the impact and usefulness of our Scenario Model and assessment tool.

Next Steps

The Handbook of Best and NEXTPractices, produced in 2015, needs to be continually updated and expanded. We see several examples of new, innovative approaches being pursued by destinations and organizations around the world.

The assessment tool used to determine one's position in the Scenario Model also needs to be reviewed and modified on a regular basis. We need to make sure that the survey takes into account changing market conditions and requirements.

Our industry will need to continue to work together to ask the tough questions leading to new strategies and approaches. Destination organizations can and should play critical roles in their communities to activate and realize the vision of building the visitor economy.

DESTINATIONS
INTERNATIONAL

APPENDICES

APPENDIX A: Foundation Board

Joseph Marinelli
Board Chair
President, Visit Savannah

Stephanie Pace Brown
Chair-Elect
Executive Director, Asheville Convention & Visitors Bureau

Jason Fulvi, CDME
Secretary/Treasurer
Executive Vice President, VisitPITTSBURGH

Cleo Battle, CDME
Immediate Past Chair
Executive Vice President
Louisville CVB

David Burgess
President - DMO Division
Miles

Donna Carpenter, CDME
President & CEO
Visit Cabarrus

Katie Callahan-Giobbi
Executive Vice President
Minding Your Business

Kyle Edmiston, CDME
Assistant Secretary
Louisiana Office of Tourism

Paul Flackett
Managing Director
IMEX Group

Kathleen Frankford, CDME
President
Discover Lancaster

Ryan George
CEO
Simpleview

John Groh, CDME
President & CEO
Rockford Area CVB

Leonard Hoops
President & CEO
Visit Indy

Al Hutchinson
President & CEO
Visit Baltimore

Sherrif Karamat
Chief Operating Officer
PCMA

John Lambeth
President
Civitas

Scott McQuade
Golden Isles Convention & Visitors Bureau
Chief Executive Officer

Travis Napper, CDME
President & CEO
Ruston Lincoln CVB

Jorge Pesquera, CDME
President & CEO
Discover the Palm Beaches

Darren Rudloff, CDME
CEO
Visit Cheyenne

Annie Rummel
President & CEO
Great Lakes Bay Regional CVB

Susie Santo
President & CEO
Visit Wichita

Bill Siegel
CEO
Longwoods International

APPENDIX B: Advisory Panel Members

DISRUPTORS PANEL

Terry Jones
Wayblazer

Sherrif Karamat
PCMA

David DuBois
IAEE

Kelly Frailey Covato
Facebook

Greg Oates
SKIFT

William Bakker
Destination Think!

Michael O'Neal
airBnB

CLIENTS PANEL

Michael Foreman
Kindology

Lisa Astorga
ISTH

Shannon Stowell
Adventure Travel Trade Association

Hari Nair
Expedia Inc.

David Peckinpaugh
Maritz Travel Company

Melissa Rawak
Association for Financial Professionals (AFP)

Nisan Bartov
CongressMed

Michael Foreman
Kindology

John Folks
Minding Your Business

Douglas Olover
South African Pharmacology Society

Stuart Ruff
RIMS

Ben Hainsworth
K.I.T. Group

Nelson Fabian
Center for Priority Based Budgeting Institute

Michael Payne
Smithbucklin

Luca Segantini
International Society of Nephrology

Robin Preston
American Chemical Society

Tracy Bury
World Confederation for Physical Therapy

Lisa Astorga
International Society on Thrombosis and Haemostasis

Valerie Guillet
Société Internationale d'Urologie

Sue Dykema
American Society for Aesthetic Plastic Surgery

David Mounteer
Jonview

COMMUNITY PANEL

Omar Nawaz
United Nations World Tourism Organization

Harmony Lamm
United Nations World Tourism Organization

Helen Marano
World Travel & Tourism Council

Julie Curtin
Development Counsellors International

Jeff Finkle
International Economic Development Council

Christopher Leinberger
George Washington University

Deborah Edwards
University of Technology Sydney – Management DG

Chris Fair
Resonance

Terestella González Denton
Sistema Universitario Ana G Mendez

Brian Payne
Central Indiana Community Foundation

DESTINATION LEADERS PANEL

Gustavo Stauffer
Guadalajara Convention and Visitors Bureau

Christian Mutschlechner
Vienna Convention Bureau

Amanda Kotze-Nhlapo
South African National Convention Bureau

Francesco Leboffe
Hong Kong Tourism Board

Karen Bolinger
Melbourne Convention Bureau

Jon Mamela
Destination Canada

Chantal Stark-Nadeau
Business Events Canada (Destination Canada)

Steen Jakobsen
Dubai Business Events

Victoria Isley
Bermuda Tourism Authority

Todd Davidson
Travel Oregon

Isaac Mizrahi
Tel Aviv Global

Signe Jungersted
Wonderful Copenhagen

Paul Nursey
Tourism Victoria

Jeannie Lim
Singapore Exhibition and Convention Bureau

Tony Sando
Sao Paulo Convention and Visitors Bureau

Michael Nagy
Rio de Janeiro Convention and Visitors Bureau

William (Bill) Talbert
Greater Miami Convention and Visitors Bureau

APPENDIX C: New Trends and Strategies

A total of 34 new trends were added to the list while the 15 lowest rated trends from 2014 were deleted from the list.

TRENDS ADDED

1. Competition creating entirely new ways of serving existing needs and significantly disrupting existing industry value chains.
2. Safety and security at destinations becoming a brand differentiator.
3. Air access to a destination is a key challenge in attracting business travelers and meeting planners.
4. Business events provide their delegates with more authentic, local experiences.
5. Increasing interest from meeting planners, associations and delegates for new sites offered by secondary and tertiary meeting destinations.
6. Reducing sponsorships, exhibits and revenues putting more pressure on destinations to address revenue declines.
7. "Bleisure" travel becoming more prominent, with business travelers increasingly incorporating leisure experiences into their established business trip schedule.
8. Associations are increasingly focused on the role that their events can play in developing connections and legacies for their associations.
9. Mobile platforms and communication will become increasingly important to engage leisure customers from the destination consideration stage through to the trip experience stage.
10. Customers increasingly expect highly curated and customized destination content from organizations.
11. Millennial segment takes over the baby boomers influence on the market.
12. Artificial intelligence will become increasingly important in managing the end-to-end customer/destination relationship from trip consideration through to on-site visitation.
13. Continued growth of travel leads to greater commoditization.
14. Customers are increasingly searching for urban over rural experiences.
15. Democratization of travel increasingly relevant due to new/growing economies, transportation options and travel as a basic right.
16. Leisure travel continues to grow at rates that make it more and more challenging for destinations to properly manage.
17. Talent attraction becoming a joint effort of tourism and other economic sectors within communities.
18. Business events shifting to be regarded as agents of long-term economic development for communities through building knowledge and advancing investment.
19. Subsidies/incentives being required to attract new air routes/services.
20. Communities collaboratively leverage their destination marketing investment across multiple economic sectors.
21. Communities considering assessment and measurement models that include community quality of life impacts in addition to overall economic impact.
22. Disruption, in the form of changing business models, terrorism, pandemics, or natural disasters, will increasingly impact how destinations think and act.
23. Communities more engaged in the development and management of the destination experience.
24. Asia Pacific, in particular China, becoming a dominant player both as a source market and as a destination.
25. Continuing growth of travel leads to degradation of the natural and man-made environment in destinations around the world.
26. Government policies creating more restrictions to the flow of travel from country-to-country.
27. Sharing economy becomes mainstream throughout society which leads to increased regulatory and legal requirements.
28. Place management organizations that are responsible for creating positive experiences in communities becoming more commonplace.
29. Increasing isolationism around the world significantly impacts travel demand.
30. Content creation and dissemination by the public across all platforms drives the destination brand and experience.

31. Video becomes the new currency of destination marketing and story-telling.
32. Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations.
33. The industry is moving from e-commerce through to m(mobile)-commerce and ultimately to V(video)-commerce in its communications and transactions with travel consumers.
34. Technology makes travel products and services more transparent to the customer.

TRENDS DELETED

1. Smart technology (e.g., smart cards and baggage tags) creating opportunities for simplified and expedited processing of international passengers.
2. Airlines seeking to generate more revenue reinvent their role in supply chain/distribution channels to offer more integrated services.
3. Increasing globalization – with the interchange of views, products, ideas, and culture – making it more difficult for destinations to accentuate their uniqueness.
4. Attracting meetings/conventions requires greater emphasis on a business brand over a leisure brand.
5. Privatization in some sectors creating additional costs borne by travelers.
6. A greater proportion of Fortune Global 500 companies locating in emerging markets.
7. Globalization requires more open-air bilateral agreements and/or ownership requirements permitting increased international air services by foreign carriers.
8. More leisure travelers seeking all-inclusive experiences.
9. Privacy laws constrain opportunities arising from new technology and processes.
10. The position that governments take on various human rights matters.
11. Most new international airline capacity growth coming from Middle Eastern carriers.
12. A highly litigious environment in North America inhibits innovation and collaboration.
13. Increased R&D in Asia resulting in more conventions being held in these markets.
14. Global warming impacting public (consumers') behavior.
15. Greater complexity in moving goods for conferences/conventions due to greater focus on border and security processes.

The project team developed an expanded list of potential strategies to also assess.

STRATEGIES ADDED

1. My organization will invest more effort and resources into video content to market the destination.
2. My organization will focus significant attention to content creation and dissemination strategies.
3. My destination will focus on developing authentic experiences for the customer.
4. My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.
5. My organization will enhance our engagement with the local community to manage future tourism considerations.
6. My destination will develop strategies to protect what we have while attracting events and visitation to our community.
7. My organization and industry will take a more active role in political and legislative issues impacting events.
8. My destination will pay close attention to safety and security as a strategic consideration in our future planning.
9. My organization will acquire competencies and skillsets to effectively compete in a disruptive economy.
10. My organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination.
11. My organization will build our capacity as curators of the destination experience, while placing less emphasis on more traditional tourism promotions.
12. My organization and industry will actively encourage policy makers to reduce barriers to travel.
13. My organization and destination has a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics
14. My organization will consider ways to measure the longer-term social, cultural and environmental impacts of tourism and business events.
15. My organization will take a lead role in our community on working with the sharing economy, including participating in discussions on regulatory matters.

16. My destination will work closely with associations to help them achieve their long-term legacy objectives.
17. My organization will engage in scenario planning to help be prepared for future disruptions and opportunities.
18. My organization will have more non-industry representatives providing direction and expertise to our planning.
19. My organization and destination will become increasingly involved in capacity management, delivering high quality experiences to fewer guests
20. My organization will invest greater resources into attracting Asia Pacific opportunities.
21. My organization will take a more direct involvement risk assessment and mitigation strategies for business events.

STRATEGIES DELETED

1. My organization will benefit from a tax regime that will provide adequate and secure funding.
2. My organization will evolve away from a membership-based model.
3. My organization will focus efforts in emerging economies (markets).
4. Visitor servicing in my destination will be conducted primarily in the digital environment.
5. My destination will be impacted by barriers to entering my country (e.g., visas, security).
6. My destination will align with other destinations under a national umbrella approach.
7. My organization will offset the costs of destination buyers through incentives more than we do today.
8. My organization will become a partner in the funding and operations of my clients' meetings.
9. Governments will spend less on funding or enabling funding for my organization.
10. My organization will engage with customers in the shared economy (e.g., airbnb, home exchange).
11. Tourism industry cohesion and alignment will be challenging to realize in my destination.
12. Advocating for a positive regulatory environment will be the responsibility of my organization.
13. Privacy laws will constrain opportunities for my organization to build customer relationships.
14. My organization will play a lesser role in generating sales and transactions.

APPENDIX D: List of Survey Participants

Argentina
Agencia de Desarrollo Ushuaia Bureau
Agencia Posadas Turismo
Attipica Dmc By Cynsa
Buenos Aires Convention & Visitors Bureau
Bureau de Eventos San Martín de Los Andes - Ensatur
Bureau de Turismo De Reuniones de Villa General Belgrano
Camara Turismo y Comercio de Villa Pehuenia & Moquehue;Integrante de La Ruta Del Pehuen
Congress Rental
Gran Buenos Aires Convention & Visitors Alliance
Iguassu Convention & Visitors Bureau
Mar Del Plata Convention & Visitors Bureau
Mendoza Bureau
Ministerio de Turismo. Provincia De Formosa
Santa Rosa Bureau de Eventos
Secretaria de Turismo
Secretaría de Turismo de Caviahue Copahue

Australia
Adelaide Convention Bureau
Business Events Sydney
Business Events Tasmania
Gold Coast Tourism Corporation

Austria
Vienna Convention Bureau

Bahrain
Bahrain Economic Development Board

Brazil
Balneário Camboriú Convention & Visitors Bureau
Belém Convention & Visitors Bureau
Belo Horizonte Convention & Visitors Bureau
Bento Convention Bureau
Campos Do Jordão E Região Convention & Visitors Bureau
Convention Bureau de João Pessoa
Curitiba e Região Convention & Visitors Bureau
Federação de CVB do Estado do Rio de Janeiro
Fiergs Exhibition & Convention Center
Floripa Convention
Fortaleza Convention Bureau
Gramado e Canela Convention & Visitors Bureau
Ifah Consulting
Iguassu Convention & Visitors Bureau
Maringá e Região Convention & Visitors Bureau
Natal Convention & Visitors Bureau
Paraná Turismo
Poços de Caldas Convention & Visitors Bureau
Rio Convention & Visitors Bureau
São Paulo Convention & Visitors Bureau
Sebrae/PR
Win Eventos

Canada
Business Events Toronto
Chinook Country Tourist Association
Destination British Columbia
Discover Saint John
Edmonton Tourism
Lloydminster Tourism
Northwest Territories Tourism
Office Du Tourisme De Québec
Ottawa Tourism
Regional Tourism Organization 4 Inc
Tourism Abbotsford
Tourism Barrie
Tourism Burlington
Tourism Kelowna
Tourism Montreal
Tourism Saskatoon
Tourism Toronto
Tourism Victoria
Tourism Windsor Essex Pelee Island
Tourism Winnipeg
Tourisme Outaouais
Travel Manitoba
Vancouver Convention And Visitors Bureau
Waterloo Regional Tourism Marketing
Yukon Convention Bureau

Chile
Santiago Convention Bureau

China
Business Events Hangzhou
Hangzhou Convention Exhibition & Travel Co.,Ltd.

Colombia
Bucaramanga Convention And Visitors Bureau
Calí Valle del Cauca Bureau Visitors & Convention
Cámara de Comercio de Barranquilla
Cartagena de Indias Convention and Visitors Bureau
Gobernacion del Valle del Cauca
Greater Bogotá Convention Bureau
Ibagué Conventions and Visitors Bureau
Medellin Convention & Visitors Bureau
Valle Del Pacífico Centro de Eventos

Costa Rica
Costa Rica Convention Bureau

Denmark
Copenhagen Convention Bureau
Wonderful Copenhagen

Dominican Republic
Santo Domingo Tourism Cluster

Ecuador
Quito Turismo

El Salvador
Burò de Convenciones de El Salvador
Ecomayan DMC EL SALVADOR

Estonia
Estonian Convention Bureau

France
Agence D'attractivité De Toulouse Métropole
Pinklab360

Georgia
Gudauri Ski Resort

Germany
GCB German Convention Bureau E.v.
Hamburg Tourist Board
Messe Berlin GmbH
Stuttgart Convention Bureau
visitBerlin
Wissenschaftsstadt Darmstadt Marketing GmbH

Guatemala
Buró de Convenciones de Guatemala
Ministerio de Economia de Guatemala

Honduras
Buró De Convenciones y Visitantes de San Pedro Sula
Instituto Hondureño de Turismo

Hong Kong
Hong Kong Tourism Board

Hungary
Hungarian Tourism Agency Ltd.

Israel
City of Tel Aviv

Italy
European Academy of Bozen/Bolzano

Japan
Japan National Tourism Organization
Kyoto Convention And Visitors Bureau
Tokyo Convention & Visitors Bureau

Jordan
Jordan Tourism Board

Malaysia
Malaysia Convention & Exhibition Bureau

Mexico
Buró de Convenciones y Visitantes de Ciudad Juárez
Casona De San Miguel De Allende Sa De Cv
Cintermex
Convenciones Puebla
Convention and Visitors Bureau Guadalajara
Corporación Para El Desarrollo Turístico De N.l.
Fideicomiso De Inversión Y Administración Para La Promoción Turística Del Estado De Aguascalientes
Fidetur San Luis Potosí
Gobierno Del Estado De México
Los Cabos Tourism Board
Mazatlan Tourism Board
Mexico Tourism Board
Oficina De Congresos y Convenciones de Queretaro
Oficina De Congresos y Convenciones de Yucatán
Oficina de Convenciones y Visitantes de Monterrey
Oficina De Convenciones y Visitantes de Puerto Vallarta
Oficina De Visitantes y Convenciones de Cancun

Monaco
Monaco Government Tourist Office

Netherlands
NBTC Holland Marketing
The Hague Convention Bureau

New Zealand
Tourism New Zealand

Norway
Inspirar A Rødven

Oman
Oman Convention Bureau

Panama
APCE
Autoridad de Turismo de Panamá

Paraguay
Paraguay Convention & Visitors Bureau

Peru
Lima Convention & Visitors Bureau
Promperú

Poland
Poznań Tourism Organisation

Rwanda
Rwanda Convention Bureau

Singapore
Singapore Tourism Board

South Africa
South Africa National Convention Bureau

South Korea
Gyeongju Convention & Visitors Bureau

Spain
Turisme De Barcelona
Turismo De Sevilla
Zaragoza Turismo

Sweden
Destination Sigtuna
Visit Stockholm

Switzerland
Congress Center Basel
Geneva Convention Bureau
Switzerland Convention & Incentive Bureau

Taiwan
Economic Development Bureau, Kaohsiung City Government
Kaohsiung City Government
Kaohsiung City Government Meeting & Event Promotion Office
Taiwan Institute Of Economic Researach

Thailand
Thailand Convention & Exhibition Bureau

Turkey
Istanbul Convention & Visitors Bureau

United Arab Emirates
Dubai Business Events

United Kingdom
London & Partners
Marketing Edinburgh

United States
1Berkshire Strategic Alliance
Abilene Convention And Visitors Bureau
Albany Convention & Visitors Bureau
Alpharetta Convention & Visitors Bureau
Alton Regional Convention & Visitors Bureau
Arlington Convention & Visitors Bureau
Asheville Convention & Visitors Bureau
Atlanta Convention & Visitors Bureau, Inc
Augusta Convention & Visitors Bureau, Inc.
Aurora Area Convention & Visitors Bureau
Beverly Hills Conference & Visitors Bureau
Boise Convention & Visitors Bureau
Brand USA
Butler County Tourism
Butler County Visitors Bureau
Cabell-Huntington Convention & Visitors Bureau
Charlotte Regional Visitors Authority
Chicago Southland Convention And Visitors Bureau
Chicago's North Shore Convention & Visitors Bureau
Choose Chicago
Cincinnati USA Regional Tourism Network
City Of Columbia Convention And Visitors Bureau
Clark-Floyd Counties Convention-Tourism Bureau
Colorado Springs Convention & Visitors Bureau
Columbus Convention & Visitors Bureau
Connecticut Convention & Sports Bureau
Convention & Visitors Bureau Pinehurst, Southern Pines, Aberdeen Area of North Carolina
Dayton Convention & Visitors Bureau
Dekalb County Convention & Visitors Bureau
Destination Cleveland
Destination Gettysburg
Destination Hilliard
Detroit Metro Convention & Visitors Bureau
Discover Lancaster
Discover Newport
Discover The Palm Beaches
Door County Visitor Bureau
Dublin Convention & Visitors Bureau
Dupage Convention And Visitors Bureau

United States, continued

Durham Convention & Visitors Bureau
Dutchess Tourism Inc.
Edmond Convention & Visitors Bureau
Elgin Area Convention & Visitors Bureau
Elkhart County IN Convention & Visitors Bureau
Emerald Coast Convention & Visitors Bureau
Experience Bryan College Station
Experience Columbia SC
Experience Columbus
Experience Grand Rapids
Experience Scottsdale
Explore Edina
Explore Lawrence
Fort Worth Convention & Visitors Bureau
Fox Cities Convention & Visitors Bureau
Frisco Convention & Visitors Bureau
Georgia Association of Convention & Visitor Bureaus
Golden Isles Convention & Visitors Bureau
Great Lakes Bay Regional Convention & Visitors Bureau
Greater Birmingham Convention & Visitors Bureau
Greater Des Moines Convention & Visitors Bureau
Greater Fort Lauderdale Convention & Visitors Bureau
Greater Green Bay Convention & Visitors Bureau
Greater Lansing Convention & Visitors Bureau
Greater Madison Convention & Visitors Bureau
Greater Palm Springs Convention & Visitors Bureau
Greater Raleigh Convention And Visitors Bureau
Greater Saint Charles Convention & Visitor Bureau
Greater Wilmington Convention And Visitors Bureau
Greensboro Area Convention & Visitors Bureau
Gulf County Tourist Development Council
Gulf Shores & Orange Beach Tourism
Hamilton County Tourism, Inc.
Houma Area Convention And Visitors Bureau
Houston First Corporation/Greater Houston Convention & Visitors Bureau
Huntingdon County Visitors Bureau
Huntsville/Madison County Visitor Center
Illinois Office Of Tourism
Irving Convention And Visitors Bureau
Ithaca Tompkins County Convention & Visitors Bureau
Jackson County Tourism
Jefferson Convention & Visitors Bureau
Joplin Convention and Visitors Bureau
Kenosha Area Convention & Visitors Bureau
Lafayette Convention And Visitors Commission
LaGrange County Convention & Visitors Bureau
Lake Charles/SWLA Convention & Visitors Bureau
Lake Erie Shores And Islands
Las Vegas Convention and Visitors Authority
Little Rock Convention & Visitors Bureau
Los Angeles Tourism & Convention Board
Louisiana Office of Tourism
Louisville Convention and Visitors Bureau
Maine Office of Tourism
Martin County Office Of Tourism
Maryland Heights Convention & Visitor's Bureau
Mat-su Convention & Visitors Bureau
Meet Chicago Northwest
Meet Minneapolis
Meet Puerto Rico
Meetnky | Northern Kentucky Convention & Visitors Bureau
Memphis Convention & Visitors Bureau
Monroe-West Monroe Convention and Visitors Bureau
Monterey County Convention & Visitors Bureau
Mount Pleasant Area Convention and Visitors Bureau
Myrtle Beach Area Convention and Visitors Bureau
Naples, Marco Island, Everglades Convention & Visitors Bureau
Nashville Convention & Visitors Corp
New Smyrna Beach Area Visitor's Bureau
Newport Beach & Company
NYC & Company, Inc.
Ocean City Department of Tourism
Olathe Convention & Visitors Bureau
Olympia Lacey Tumwater Visitor & Convention Bureau
Oshkosh Convention & Visitors Bureau
Paducah Convention & Visitors Bureau
Panama City Community Development Council
Park City Chamber of Commerce | Convention & Visitors Bureau
Peoria Area Convention & Visitors Bureau
Philadelphia Convention & Visitors Bureau
Pocono Mountain & Visitors Bureau
Providence Warwick Convention And Visitors Bureau
Pulaski County Tourism Bureau
Quad Cities Convention & Visitors Bureau
Richmond Region Tourism
Rochester, MN Convention & Visitors Bureau
Rockford Area Convention & Visitors Bureau
Rosemont Convention Bureau
Ruston Lincoln Parish Convention and Visitors Bureau
San Diego Tourism Authority
Shreveport-bossier Convention And Tourist Bureau
Sonoma County Tourism

United States, continued

South Shore Convention and Visitors Authority
Springfield IL Convention & Visitors Bureau
Springfield MO Convention & Visitors Bureau, Inc
St Augustine, Ponte Vedra, & The Beaches Visitors and Convention Bureau
Stevens Point Area Convention & Visitors
The Beaches of Fort Myers & Sanibel
The Isramworld Portfolio/Prideworld
Travel Michigan
Tuolumne County Visitors Bureau
Utah Valley Convention and Visitors Bureau
Ventura Visitors & Convention Bureau
Visit Anaheim
Visit Anchorage
Visit Aurora, Inc.
Visit Austin
Visit Baton Rouge
Visit Beloit
Visit Bloomington
Visit Brookfield
Visit Buffalo Niagara
Visit Carlsbad
Visit Champaign County
Visit Cheyenne
Visit Dallas
Visit Dana Point
Visit Duluth
Visit Eau Claire
Visit Enid
Visit Fort Collins
Visit French Lick West Baden
Visit Granbury Inc.
Visit Hendricks County
Visit Hot Springs
Visit Huntington Beach
Visit Indy
Visit Jacksonville
Visit Laguna Beach
Visit Lake County
Visit Lexington
Visit Longmont
Visit Mesa
Visit Milwaukee
Visit Mississippi Gulf Coast
Visit Mobile
Visit Muskegon
Visit Napa Valley
Visit Oak Park
Visit Ogden
Visit Omaha
Visit Orlando
Visit Overland Park
Visit Panama City Beach
Visit Pensacola
Visit Philadelphia
Visit Phoenix
Visit Portland Maine
Visit Rochester
Visit Salt Lake
Visit San Antonio
Visit Santa Barbara
Visit Sarasota County
Visit Savannah
Visit Stockton
Visit Syracuse
Visit Tampa Bay
Visit Topeka
Visit Tri-cities
Visit Tri-valley
Visit Tucson
Visit Vacaville
Visit Vancouver USA
Visit Walla Walla
VisitNorfolk
VisitPittsburgh
Waterloo Convention & Visitors Bureau
Wausau/Central Wisconsin Convention & Visitors Bureau
Williamson County Convention & Visitors Bureau
Yakima Valley Tourism

Uruguay

Punta del Este Convention Bureau

APPENDIX E: Trends

RANK	TREND	AVG.
1	Social media's prominence in reaching the travel market (e.g. Facebook, Pinterest, Twitter, Weibo).	3.57
2	Content creation and dissemination by the public across all platforms drives the destination brand and experience.	3.54
3	Customers increasingly seeking authentic and personalized travel experience.	3.52
4	Mobile platforms and communication will become increasingly important to engage leisure customers from the destination consideration stage through to the trip experience stage.	3.45
5	Mobile platforms and apps becoming the primary engagement platform for travelers.	3.44
6	Video becomes the new currency of destination marketing and story-telling.	3.39
7	Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations.	3.37
8	Smart technology (e.g. phones, bag tags and cards) creating new opportunities for innovative new services and processes.	3.32
9	Technology enabling faster decision-making by customers.	3.31
10	Geotargeting and localization becoming more prevalent.	3.31
11	Organizations developing strategic alliances in order to leverage resources.	3.29
12	Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector.	3.26
13	Customers increasingly expect highly curated and customized destination content from DMOs.	3.25
14	The brand of a destination becoming a more important factor in travel decisions to consumers.	3.24
15	Customers increasingly looking to experience a local's way of life.	3.22
16	Air access to a destination is a key challenge in attracting business travelers and meeting planners.	3.22
17	Travelers demanding more information, control, interaction, and personalization.	3.18
18	Hotel taxes increasingly vulnerable to alternative politically based projects.	3.16
19	Business events provide their delegates with more authentic, local experiences.	3.15
20	The industry is moving from e-commerce through to m(mobile)-commerce and ultimately to V(video)-commerce in its communications and transactions with travel consumers.	3.13
21	Brand identity for destinations becoming more critical in terms of meeting planner perceptions about value and experience.	3.12
22	Disruption, in the form of changing business models, terrorism, pandemics, or natural disasters, will increasingly impact how destinations think and act.	3.08
23	Technology makes travel products and services more transparent to the customer.	3.08
24	Communities more engaged in the development and management of the destination experience.	3.06
25	Talent attraction becoming a joint effort of tourism and other economic sectors within communities.	3.05
26	The market moving towards a "shared economy" with assets being rented or bartered, outside of traditional commercial arrangements (e.g. Airbnb, home exchange).	3.05
27	Short-stay trips and mini vacations becoming increasingly popular.	3.03
28	Governments dealing with tourism from an integrated, multi-departmental perspective, focused on economic development.	3.02
29	Peer-to-peer buyer influence driving customer purchases.	3.01
30	Economic conditions continuing to be highly volatile, subject to global and regional shocks.	2.99

31	Political instability creating havoc in certain markets.	2.98
32	Competition creating entirely new ways of serving existing needs and significantly disrupting existing industry value chains.	2.98
33	Labor and skill shortages increasingly being felt in sectors of the tourism industry.	2.97
34	Millennial segment takes over the baby boomers influence on the market.	2.97
35	Business events shifting to be regarded as agents of long-term economic development for communities through building knowledge and advancing investment.	2.95
36	Safety and security at destinations becoming a brand differentiator.	2.94
37	Government policies creating more restrictions to the flow of travel from country-to-country.	2.94
38	Subsidies/incentives being required to attract new air routes/services.	2.93
39	Security risks hampering travel decisions.	2.93
40	Communities collaboratively leverage their destination marketing investment across multiple economic sectors.	2.93
41	More third-party information providers aggregating content about destinations.	2.92
42	Increasing interest from meeting planners, associations and delegates for new sites offered by secondary and tertiary meeting destinations.	2.91
43	Artificial intelligence will become increasingly important in managing the end-to-end customer/destination relationship from trip consideration through to on-site visitation.	2.90
44	Wearable technology enabling destination marketers to personalize their services.	2.90
45	Visa waiver programs reducing barriers to entering some countries.	2.89
46	Reducing sponsorships, exhibits and revenues putting more pressure on destinations to address revenue declines.	2.89
47	With advances in technology and social media, greater collaboration occurring between competitors to move similar interests forward.	2.88
48	Communities considering assessment and measurement models that include community quality of life impacts in addition to overall economic impact.	2.88
49	“Bleisure” travel becoming more prominent, with business travelers increasingly incorporating leisure experiences into their established business trip schedule.	2.87
50	Personal ecosystems connecting the destination digital ecosystem and the visitor’s personal ecosystem.	2.86
51	Increasing importance of transparency and building partnerships to secure business to a destination.	2.86
52	Perceived barriers to entering some countries (e.g. visa requirements), thereby inhibiting foreign travel.	2.85
53	Sharing economy becomes mainstream throughout society which leads to increased regulatory and legal requirements.	2.82
54	More information clutter and noise about destinations occurring in the marketplace.	2.82
55	Destinations making greater use of incentives and grants to obtain business.	2.78
56	Combined business and family travel as well as multi-generational travel becoming more popular.	2.77
57	Customers going directly to suppliers for goods and services.	2.75
58	Meeting planners choosing destinations based on financial outcomes over destination appeal.	2.73
59	Economic conditions and growth rates differing dramatically across regions, causing major shifts in foreign visitor source markets.	2.69
60	Asia Pacific, in particular China, becoming a dominant player both as a source market and as a destination.	2.68
61	Place management organizations that are responsible for creating positive experiences in communities becoming more commonplace.	2.68

62	New destinations emerging around the world, increasing competition for both leisure and convention business.	2.62
63	National brands developing meetings and convention business to help bring business to local destinations.	2.61
64	Rising importance of conscious travel (environmental sustainability, social justice and cultural rejuvenation).	2.61
65	Associations diminishing in size with generational shifts.	2.60
66	Individuals seeking to be engaged in discussions with cyber communities proliferating.	2.57
67	New online teaching platforms resulting in declining attendance at educational meetings and conventions.	2.57
68	Continued growth of travel leads to greater commoditization.	2.55
69	Continuing growth of travel leads to degradation of the natural and man-made environment in destinations around the world.	2.54
70	Increased growth in the number of associations leading to more meetings, but with smaller attendance levels.	2.54
71	Increasing isolationism around the world significantly impacts travel demand.	2.53
72	Customers are increasingly searching for urban over rural experiences.	2.53
73	Democratization of travel increasingly relevant due to new/growing economies, transportation options and travel as a basic right.	2.52
74	Leisure travel continues to grow at rates that make it more and more challenging for destinations to properly manage.	2.50
75	Associations are increasingly focused on the role that their events can play in developing connections and legacies for their associations.	2.44

APPENDIX F: Strategies

RANK	STRATEGY	AVG.
1	My organization will invest more effort and resources into video content to market the destination.	3.48
2	My organization will focus significant attention to content creation and dissemination strategies.	3.46
3	My destination will focus on developing authentic experiences for the customer.	3.31
4	My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.	3.24
5	My organization will play more of a central role in advocacy in my destination.	3.22
6	My organization will enhance our engagement with the local community to manage future tourism considerations.	3.21
7	My destination will develop strategies to protect what we have while attracting events and visitation to our community.	3.21
8	My organization will design digital customer engagement primarily around mobile platforms.	3.19
9	My organization will place greater emphasis on engaging with customers in two-way conversations.	3.19
10	My organization will be more involved in broader economic development projects and initiatives.	3.13
11	My organization will develop new strategies to refocus on the millennial market.	3.06
12	The economic impact of tourism (and conventions) will be better understood in my destination.	3.04
13	My organization will connect visitor experience with the quality of life of residents in my community.	3.03
14	My organization will form more strategic alliances outside the DMO industry.	3.02
15	My organization will adopt operating standards and consistent measures of performance with other organizations.	3.00
16	My organization will agree to a uniform methodology with other DMOs to measure economic impact.	2.99
17	My organization will put a greater emphasis on market segmentation.	2.95
18	My organization will take on a greater role as cultural champion of my destination.	2.94
19	My organization will invest more effort in scanning the market for business intelligence.	2.94
20	My organization and industry will take a more active role in political and legislative issues impacting events.	2.90
21	My organization will engage more closely with non-traditional stakeholders in my destination.	2.90
22	My destination will pay close attention to safety and security as a strategic consideration in our future planning.	2.89
23	My organization will participate more in building platforms to improve visitor experience.	2.89
24	My organization will acquire competencies and skillsets to effectively compete in a disruptive economy.	2.88
25	My organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination.	2.87
26	My organization will have a greater role in policy and product development.	2.87
27	My organization will build our capacity as curators of the destination experience, while placing less emphasis on more traditional tourism promotions.	2.86
28	My organization will balance the need for growth with responsible and sustainable development.	2.85
29	My organization and industry will actively encourage policy makers to reduce barriers to travel.	2.82
30	Digital services and systems in my destination will keep pace with customer demand.	2.79

31	My organization and destination has a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics	2.78
32	My organization will consider ways to measure the longer-term social, cultural and environmental impacts of tourism and business events.	2.78
33	Collaborative technology will be a core strategy for my organization to drive business value.	2.76
34	My organization will have strategies and policies related to diversity of people.	2.74
35	My organization will manage content across digital channels on behalf of community stakeholders.	2.74
36	My organization will have tools in place to manage large and complex data (or "big data").	2.73
37	My organization will have strategies to address a changing generation in the workforce.	2.73
38	My destination will encourage my national brand to play a bigger role than it does today.	2.69
39	My organization will act as conduit to build social networks among our local business community.	2.68
40	My organization will work more closely with airlines to generate business for my destination.	2.67
41	My organization will hire destination managers, as well as those with backgrounds in sales and marketing.	2.67
42	My organization will take a lead role in our community on working with the sharing economy, including participating in discussions on regulatory matters.	2.67
43	My organization will have to secure new revenue sources to maintain current funding levels.	2.61
44	My destination will work closely with associations to help them achieve their long-term legacy objectives.	2.58
45	Place marketing/branding entities will come together under a singular approach in my destination.	2.58
46	My national tourism organization will encourage local destination brands in my country.	2.57
47	My organization will partner with a greater number of competitive destinations.	2.55
48	Funding for my organization will be directly tied to performance criteria.	2.53
49	My organization will engage in scenario planning to help be prepared for future disruptions and opportunities.	2.53
50	My organization will play a greater role in the creation of events, to animate the destination.	2.51
51	The brand of my destination will be defined by the community.	2.51
52	My organization will have more non-industry representatives providing direction and expertise to our planning.	2.39
53	My organization and destination will become increasingly involved in capacity management, delivering high quality experiences to fewer guests	2.21
54	My organization will invest greater resources into attracting Asia Pacific opportunities.	2.21
55	My organization will take a more direct involvement risk assessment and mitigation strategies for business events.	2.20

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