

I I I CAREAR IN

### **A Strategic Road Map** for the NEXT Generation of Destination Organizations







Louisiana

Michigan

Missouri

Montana

Minnesota Mississippi

Maine

#### **CLIENT STATES**

Alabama Arizona California Florida Georgia lowa Illinois Kansas Kentucky

Nebraska New Jersey Massachusetts New Mexico New York North Carolina North Dakota Ohio Oklahoma

Pennsylvania South Carolina South Dakota Tennessee Texas Virginia Washington West Virginia Wyoming



#### FRESH.

Young Strategies, Inc. (YSI) is a research and planning firm which focuses on destination marketing organizations and travel destinations. YSI's approach is to custom tailor each research study to the specific needs of the client. In today's highly technological and rapidly changing business world, market research is the best tool available to help you make effective strategic directions. Research reduces your risks, identifies opportunities for growth and helps you organize and take action.

#### TRAVEL.

YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. We specialize in research for travel destinations. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, community economic development, convention center management, association management and parks/recreation administration. It's all we do, and our clients respect our experience.

#### RESEARCH.

Young Strategies can help you understand and predict visitor behavior as well as provide the tools necessary to act on that information. Having worked with 150+ destinations in 35 states, we understand that your destination has unique challenges and objectives, and your choice of a research and planning firm should reflect that. It's important to look for a partner with industry-specific knowledge. The final report will be an easy-to-read document that presents the customer-focused data with recommendations for action.

### **Lessons in Leadership**





### **3Transformational Opportunities**

### **1.DESTINATION ALIGNMENT**

Aligning the public, private and civic sectors drives destination performance

### **2.SUSTAINABLE DEVELOPMENT**

Destination and product development should marry people, planet, profit and policy

### **3.VALUES BASED MARKETING**

Community values, goals and energy are the new competitive advantage

# DESTINATION

**Futures Study** 

Overview of trends and strategies for destination organizations worldwide

Previous studies in 2014, 2017, 2019 & 2021

Input from over 830 participants in 62 countries  $\xrightarrow{f}$  Scenario Model

Detailed assessment of destination strength and alignment

Updated DNEXT model in 2021

375 destination assessments in 12 countries

### **Stakeholders**



### Community

Government Business Community Economic Development Local Foundations Education

### Market

Meeting Planners Tour Operators Travel Agents Event Planners



# Scenario Model

### **Scenario Model**



**Weak Destination Alignment** 



Attractions & Experiences



Arts, Culture & Heritage



Dining, Shopping & Entertainment



Outdoor Recreation

### Destination **Strength** Variables



Conventions & Meetings



Events & Festivals



Sporting Events



Accommodation



Local Mobility & Access



Destination Access



Communication Infrastructure



Health & Safety





Business Support



Community Group & Resident Support



Government Support



Organization Governance

### Destination **Alignment** Variables



Workforce Development



Hospitality Culture



Equity, Diversity & Inclusion



Funding Support & Certainty



Regional Cooperation



Sustainability & Resilience



Emergency Preparedness



Economic Development



# **2023 Futures Study**

### **Global Advisory Group**



**Bettina** 

**Reventlow-Mourie** 

**Caroline Strand** 

Matthias Schultz

**Nelly Mukazayire** 

Corne Koch

**Jos Vranken** 

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 $\star$ 

#### South/Central America & Caribbean

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Alejandra Zuñiga **David Hidalgo** Fernando Fondevilla **Gilberto Salcedo Gustavo Stauffer** Julián Franco Mauricio Magdaleno Nancy Mejía **Reizel Vilorio** Silvana Biagiotti Toni Sando Vaniza Schuler

#### Ministry of Tourism (MITUR), Dominican Republic (Vice Minister)

CEO, Visit Puerto Varas CVB, Chile Managing Director, Rx LATAM, LATAM Promtur Panama (National DMO) - CEO, Panama Vice Minister, Tourism, ProColombia, Colombia CEO Guadalajara CVB / DMO, Mexico Secretary of Tourism, Valle del Cauca State, Cali, Colombia Clúster de Turismo de Nuevo León, Mexico Managing Director, National Chamber of Tourism Guatemala, Guatemala Vice Minister, Instituto Hondureño de Turismo, Honduras Chairman of the Board, Latin America Association of CVBs, Latam Sao Paulo, CVB & President, UNE DESTINOS (Brazilian Assn of CVBS), Brazil Director Business Events, EMBRATUR, Brasil

#### Canada

#### Scott Beck

**Chantal Sturk-Nadeau** Leslie Bruce **Michael Crockett** Paul Nursey **Ross Jefferson Royce Chwin** Stephanie Clovechok **Yves Lalumiere** 

#### **Destination Toronto**

**Destination Canada Business Events** Banff & Lake Louise Tourism Ottawa Tourism **Destination Greater Victoria** Discover Halifax **Destination Vancouver** Tourism Saskatoon Tourisme Montreal

### USA

Chris Thompson Brad Dean Casandra Matej **Craig Davis** Dave Lorenz Gina Trigila Jeff Miller Jill Delaney **Jennifer Chun** Leonard Hoops Martha Sheridan Melyssa Reeves Sara Toliver Victoria Isley

#### Brand USA Discover Puerto Rico Visit Orlando Visit Dallas Pure Michigan Los Angeles Tourism Travel Portland **Discover Albany** Hawaii Tourism Visit Indv Greater Boston CVB Vacaville Visit Oaden Asheville CVB

#### Europe, Middle East, Africa

#### Wonderful Copenhagen

Visit Stockholm Capetown DMO Holland Tourism German Convention Bureau Slovenian Convention Bureau Rawanda Convention Bureau Tel Aviv Convention Bureau Fáilte Ireland Fáilte Ireland VisitFlanders

Petra Stusek **Rory Archibald** Sam Johnston

Simone McCaugherty Yrjötapio Kivisaari Kathryn Davis Patricia Yates

Liubliana, Slovenia VisitScotland **Convention Bureaux** of Ireland London & Partners Visit Oulu

Visit West (Bristol & Bath, UK) Visit Britain / Visit England

#### **Asia Pacific**

**Dr. Edward Koh** Lyn Lewis-Smith Amelia Roziman Julia Swanson Karen Bolinger Leonie Ashford Shin Osuka

#### **Singapore Tourism Board** BeSydney

Business Events Sarawak (Malaysia) Melbourne Convention Bureau Gold Coast CVB Tourism New Zealand Business Events Japan Travel & Tourism Association

### **4 Global Advisory Panels**

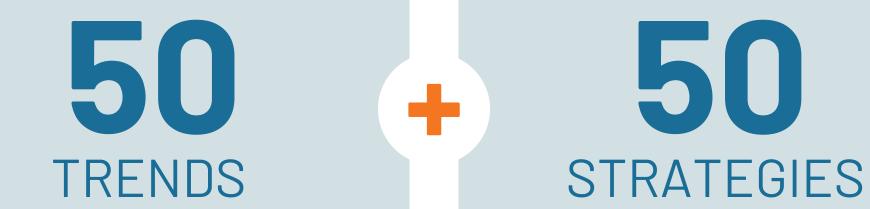




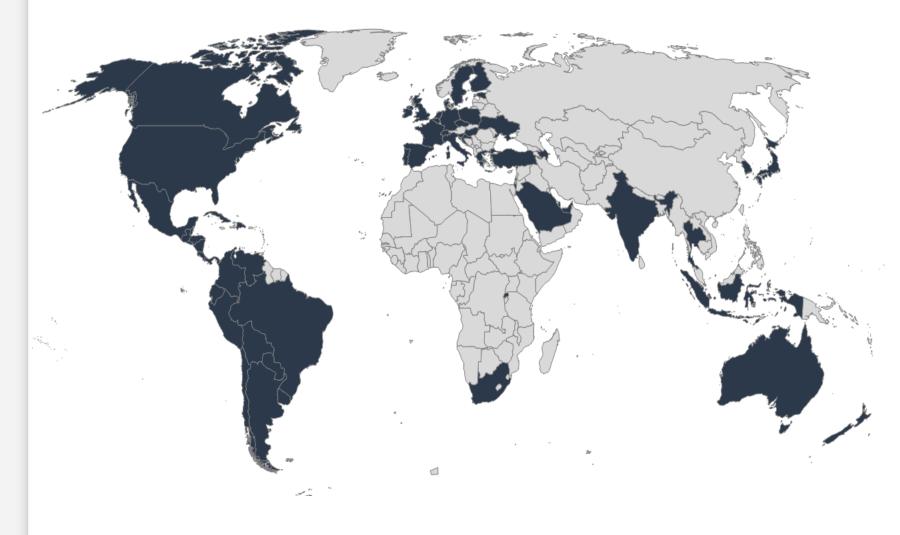








### 2023 Survey



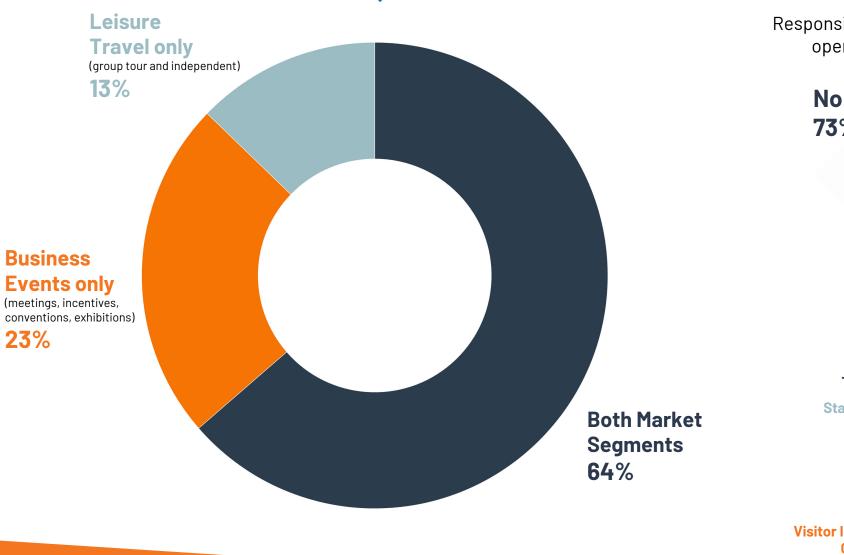
Survey Participants

**B37** PARTICIPANTS

> 62 countries

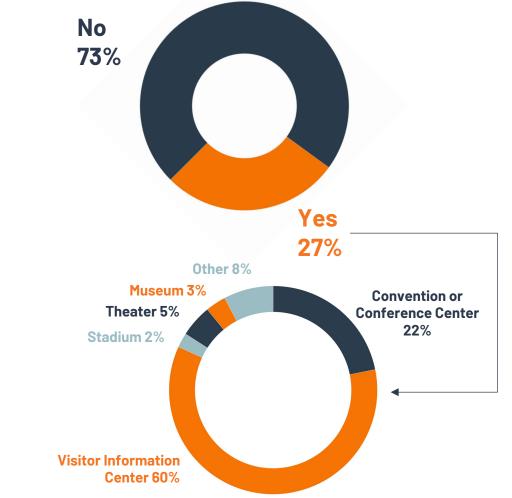
### Market Segment

23%



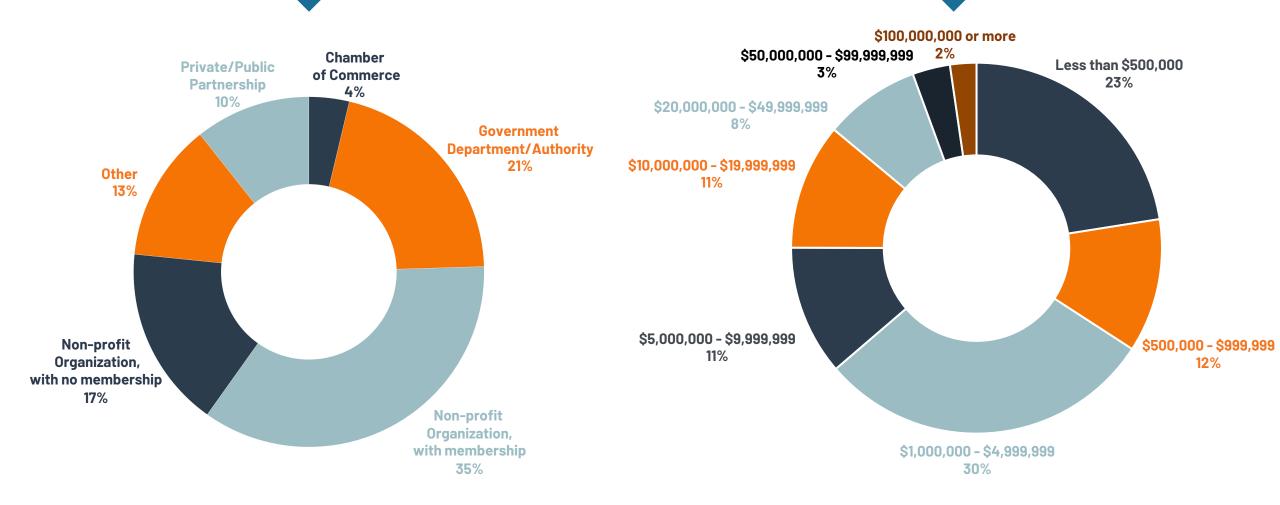
### **Facility Management**

Responsible for the management (non-selling) and operation of a community-based venue:



### **Business Model**

### Budget



## **Top Trends**





- Artificial intelligence will become increasingly prevalent at an accelerated pace
- **2** Customers are increasingly seeking a unique, authentic travel experience
- 3 +27 Communities expect to be more engaged in destination, product and experience development for locals and visitors
- 4 +28 Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts
  - Greater industry, community and government alignment is driving destination competitiveness and brand
- **6** +32 Resident sentiment is becoming a key measurement
- 7 +48 Labor and skill shortages are increasingly being felt in sectors of the tourism industry
- 8 +20 There's a greater focus on placemaking to benefit both locals and visitors
- 9 +27 DMO/CVBs are increasing advocacy to communicate value of visitor economy to government
- **10** +27 New data management platforms provide a 360-degree view of visitors and destination to help optimize strategy
- 11 -8 Content creation and dissemination by the public and stakeholders across all platforms drives the destination brand and experience
- 12 +6 Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources
- Travelers are seeking more personal enrichment and wellbeing
- 14 -10 Short-form video becomes the new currency of destination marketing and storytelling
- 15 +12 There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain



- **1 NEW** Protect revenue sources to maintain current funding levels
- **2** +3 Focus on developing authentic experiences for the customer
- **3 +8** Better integrate tourism and economic development
- Build the destination brand around the community's goals, values and creative energy
- **5** +15 Have a greater role in destination and product development
  - Develop a destination master/management plan to define long-term strategy
- 7 +5 Increase capabilities in data management for business intelligence, marketing and community engagement
- Focus significant attention on content creation and dissemination
- **Develop a data-driven plan for a more sustainable visitor economy**
- 10 +1 Align the visitor experience and quality of life for residents in my community
- **INEW** Increase our organization's knowledge of innovative technologies
- **12 NEW** Increase efforts to attract and retain our organization's talent
- **13 NEW** Increase support with local government leadership to influence policy
- **14 +42** Develop and support new events in the destination
- **15 NEW** Improve local resident sentiment to increase support for the visitor economy

Protect revenue sources to maintain current funding levels

7

Increase capabilities in data management for business intelligence, marketing & community engagement

11

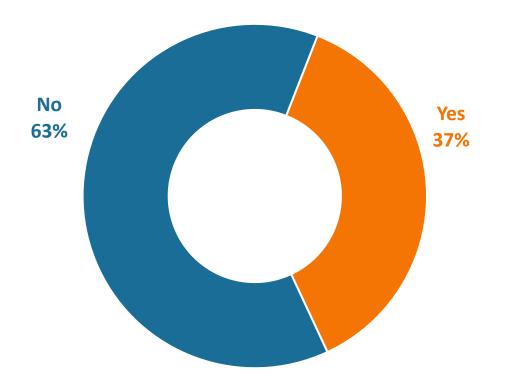
Increase our organization's knowledge of innovative technologies

12

Increase efforts to attract & retain our organization's talent

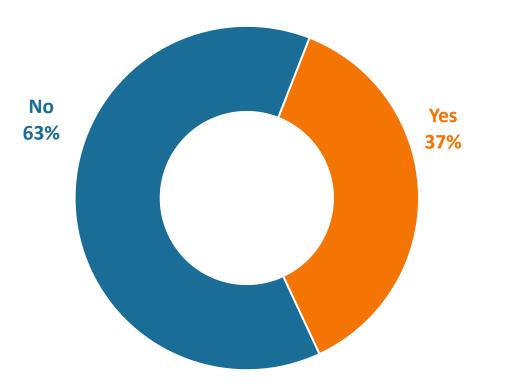
**STRATEGIES** 

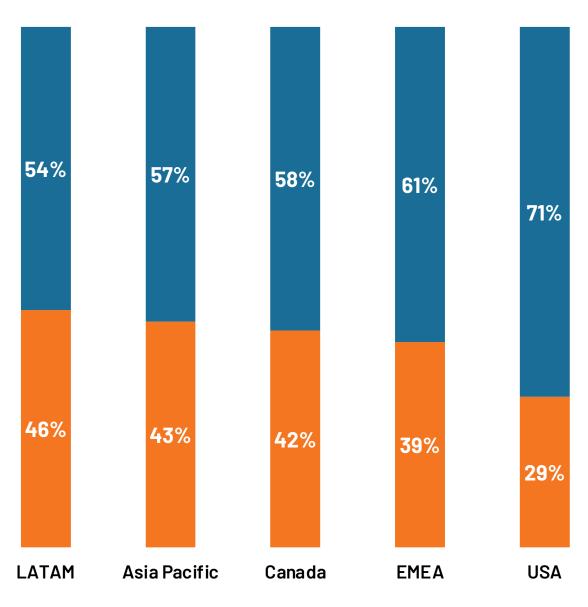
Is any of your current funding at risk of being reduced or eliminated in the next three years?



**STRATEGIES** 

#### Is any of your current funding at risk of being reduced or eliminated in the next three years?





■Yes ■No

5

9

Focus on developing authentic experiences for the customer

- Have a greater role in destination & product development
- 6 Develop a destination master/management plan to define long-term strategy
  - Develop a data-driven plan for a more sustainable visitor economy
  - Align the visitor experience and quality of life for residents in my community
  - Develop & support new events in the destination

Build the destination brand around the community's goals, values and creative energy



4

Focus attention on content creation and dissemination

#### Greenwood, SC More than "The Emerald City"







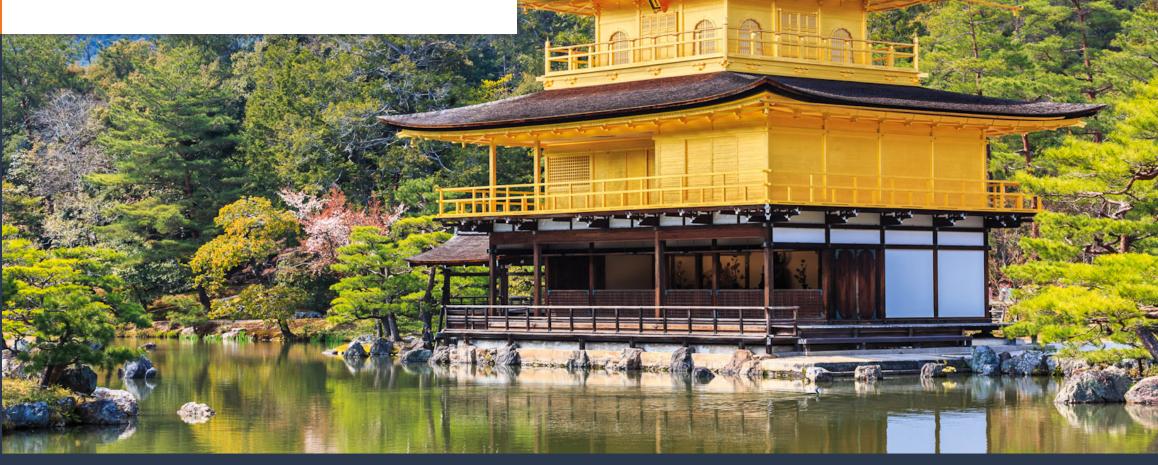






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### **Roles & KPIs**



Organization Role	Current
Destination marketing	1
Community relations and partnership	2
Brand management	3
Destination information resource	4
Data research and business intelligence	5
Destination and product development	6
Industry advocate	7
Government relations and policy development	8
Visitor services	9
Meetings and conventions sales	10
Broader economic development	11
Leisure sales	12
Equity, Diversity, Inclusion leadership	13
Environmental stewardship	14
Sports tourism development and promotion	15
Major event partner and developer	16
Workforce development	17
Crisis management and emergency preparedness	18

Organization Role	Current	Future
Destination marketing	1	1
Community relations and partnership	2	5
Brand management	3	3
Destination information resource	4	6
Data research and business intelligence	5	2 🕇
Destination and product development	6	4 🕇
Industry advocate	7	8
Government relations and policy development	8	7
Visitor services	9	11
Meetings and conventions sales	10	10
Broader economic development	11	9
Leisure sales	12	12
Equity, Diversity, Inclusion leadership	13	14
Environmental stewardship	14	13
Sports tourism development and promotion	15	16
Major event partner and developer	16	17
Workforce development	17	15
Crisis management and emergency preparedness	18	19

KPI	Current
Economic impact of tourism	1
Overnight visitation	2
Stakeholder support and business development	3
Room nights generated	4
Number of visitors/delegates	5
Visitor satisfaction	6
Marketing ROI	7
Member/partner satisfaction	8
Social media metrics	9
Community benefits and social impacts	10
Leads/referrals to business	11
Hotel performance metrics	12
Resident sentiment	13
Earned media metrics	14
Equity, diversity, and inclusion	15
Long-term/legacy impacts from events	16
Conversion metrics	17
Environmental stewardship impacts	18
Air service	19
Event bid success ratio	20
Venue profits	21

KPI	Current	Future
Economic impact of tourism	1	1
Overnight visitation	2	3
Stakeholder support and business development	3	10
Room nights generated	4	8
Number of visitors/delegates	5	5
Visitor satisfaction	6	2
Marketing ROI	7	4 🕇
Member/partner satisfaction	8	6
Social media metrics	9	13
Community benefits and social impacts	10	9
Leads/referrals to business	11	12
Hotel performance metrics	12	14
Resident sentiment	13	7 🕇
Earned media metrics	14	16
Equity, diversity, and inclusion	15	11
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Event bid success ratio	20	20
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# Transformational Opportunities





### DMO Mandate







**Community** Alignment



**Destination** Development



DEMAND

### DMO Mandate



Visitor Engagement

- Digital storytelling
- Brand management
- Al marketing

DEMAND

- Visitor servicing
- Loyalty program

#### DMO Mandate

DEMAND

- Data research & business intelligence
- Business events
- Major events/festivals
- Sports
- Film, music & culture







**Exhibitor Information** 

program information and simplified travel planning.

#### **'Elele Program**

The State of Hawai'i's diverse expertise and resources can greatly enrich your business programs as a home to well established educational centers, as an important hub for international trade and business and as an important site for research across many different fields.

Meet Hawai'i will help you make productive connections within your industry through its extensive network of '*Elele* (ambassadors), who will become invaluable resources for you while prospecting and planning your program.

Whether it's showcasing state-of-the-art telescopes to astronomers atop Maunakea or bringing in experts on Hawai'i's clean technology initiatives, by connecting you with the right '*Elele*, we'll take your program in exciting and enlightening new directions.

Our connections with Hawai'i's researchers, industry experts and educators provide:

- Indispensable insights and insider knowledge on resources within Hawai'i that will help you better package and promote our destination to your organization or clients
- Ways to attract new attendees and make your programs more robust, as your '*Elele* leverage connections and affiliations with local, national and international organizations
- Assistance with on-the-ground planning to effectively integrate industry-specific facilities and locations into your programs

#### DMO Mandate



# Hawai'i Tourism Authority DestinationNEXT Assessment Board of Directors Meeting

July 28, 2022



### **Scenario Model**



**Weak Destination Alignment** 



Attractions & Experiences



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Outdoor Recreation

#### Destination **Strength** Variables



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Events & Festivals



Sporting Events



Accommodation



Local Mobility & Access



Destination Access



Communication Infrastructure



Health & Safety





Business Support



Community Group & Resident Support



Government Support



Organization Governance

#### Destination **Alignment** Variables



Workforce Development



Hospitality Culture



Equity, Diversity & Inclusion



Funding Support & Certainty



Regional Cooperation



Sustainability & Resilience



Emergency Preparedness

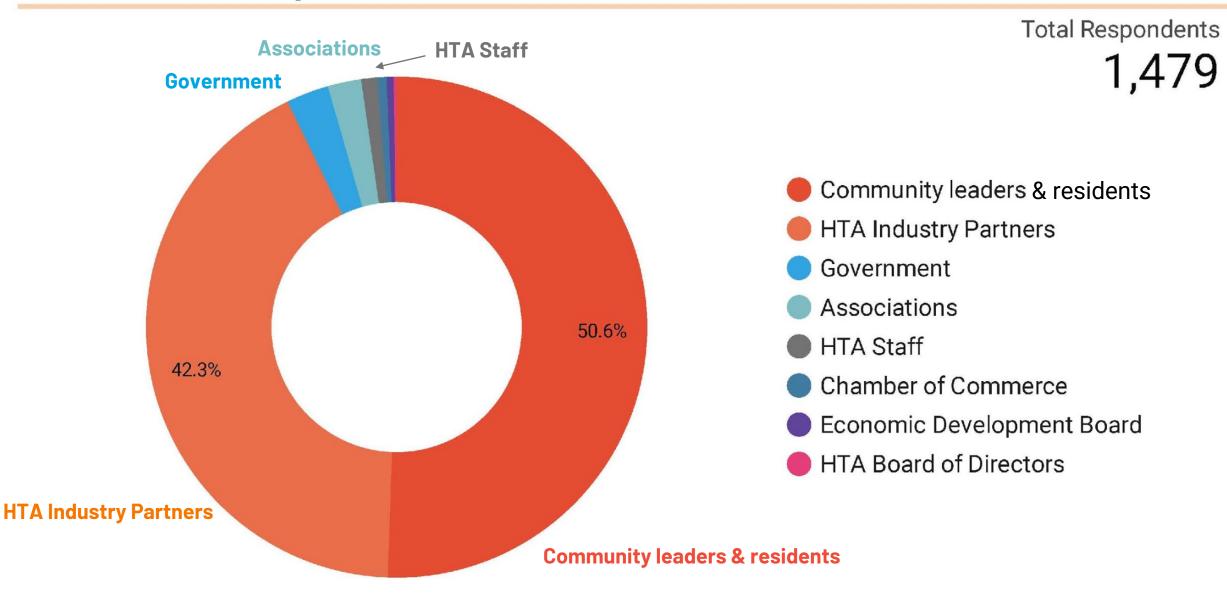


Economic Development



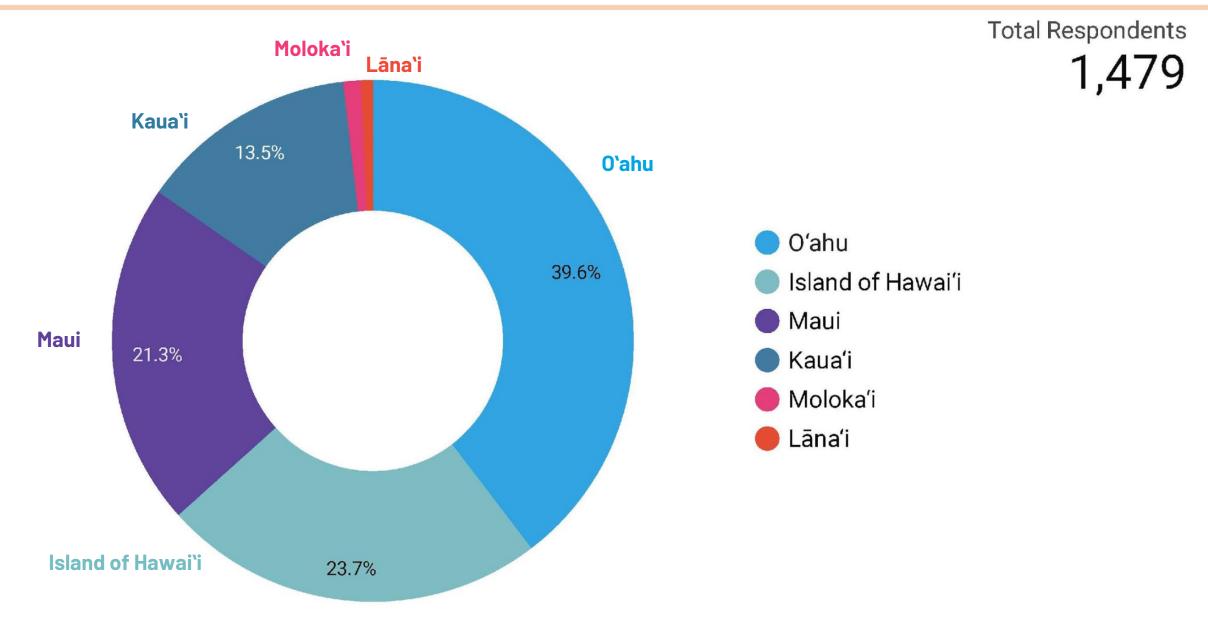
#### **Stakeholder Groups**

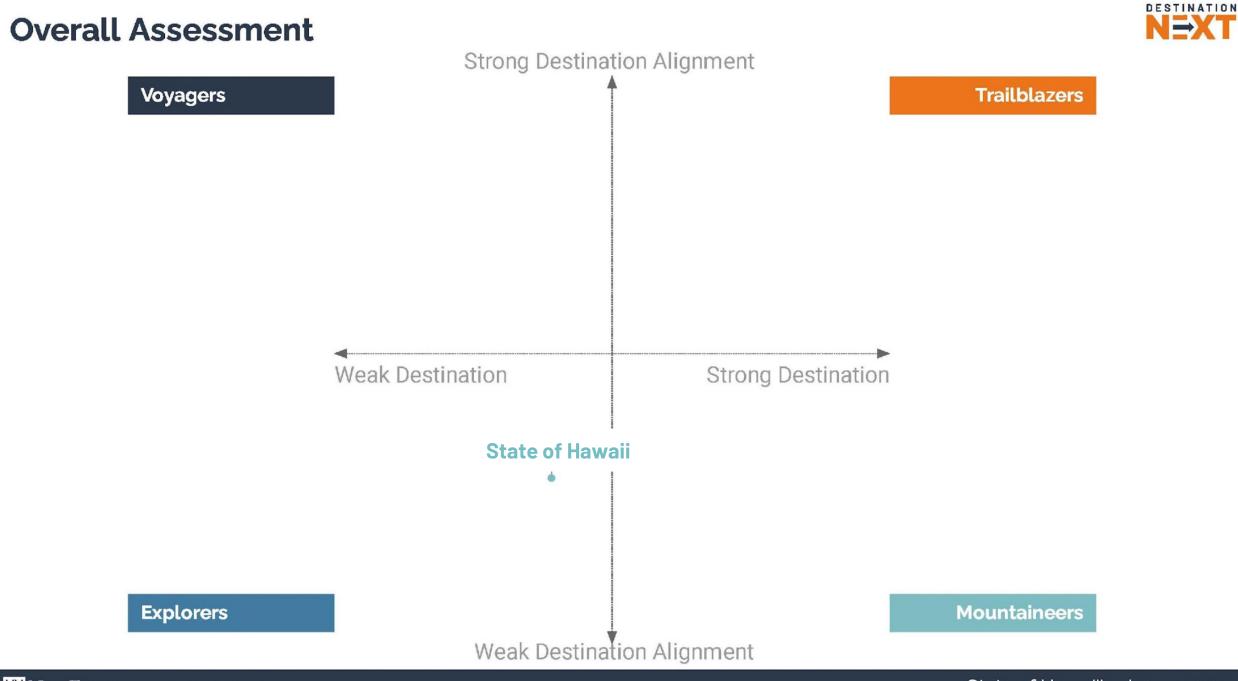




#### Location







#### **Examples of Other Destinations**



#### Voyagers

- Northwest Florida
- Hilton Head Island
- New Smyrna Beach Area
- Shreveport
- Louisville
- Geneva

#### Explorers

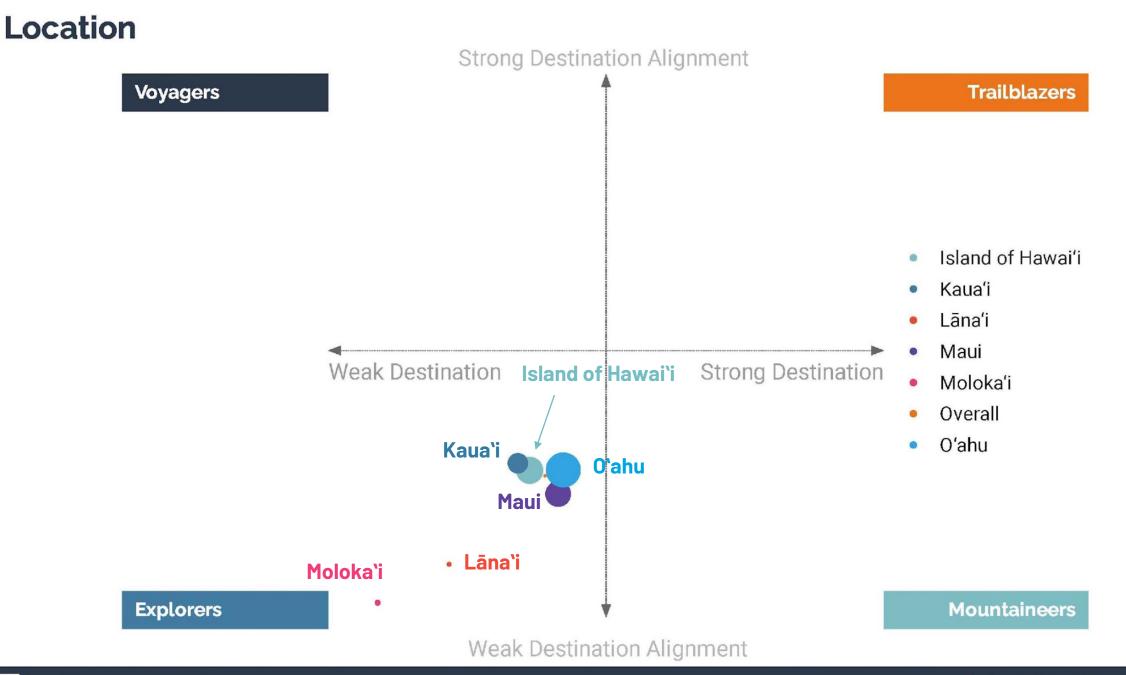
- Michigan
- Daytona Beach Area
- The Branson region
- Niagara Falls, NY
- Niigata, Japan

#### Trailblazers

- Orlando
- Phoenix
- Sydney
- Newport Beach
- Denver
- Anaheim

Mountaineers

- Toronto
- Dallas
- Buffalo & Erie County
- White Mountains



DESTINATION

#### **Destination Strength**

Opportunities & Challenges

Local Mobility & Access	<ul> <li>Roads cannot handle traffic year-round</li> <li>Inadequate parking facilities</li> <li>Not bike/walk friendly</li> </ul>
Destination Access	<ul> <li>Airport infrastructure</li> <li>Public transit options to the Airport (underway)</li> </ul>
Health & Safety	<ul> <li>Homelessness, crime &amp; litter</li> </ul>
Sporting Events	<ul> <li>Venues for amateur and professional sporting events</li> <li>Financial support for sporting events</li> </ul>
Accommodation	<ul> <li>Short-term rentals impede quality of life</li> </ul>
Dining, Shopping & Entertainment	<ul> <li>Dynamic Eveneing entertainment</li> </ul>
Communication Infrastructure	<ul> <li>Broadband capacity &amp; free Wi-Fi-Access in public areas</li> </ul>

#### **Destination Alignment**

**Opportunities & Challenges** 

Workforce Development

Community and Resident Support

Sustainability & Resilience

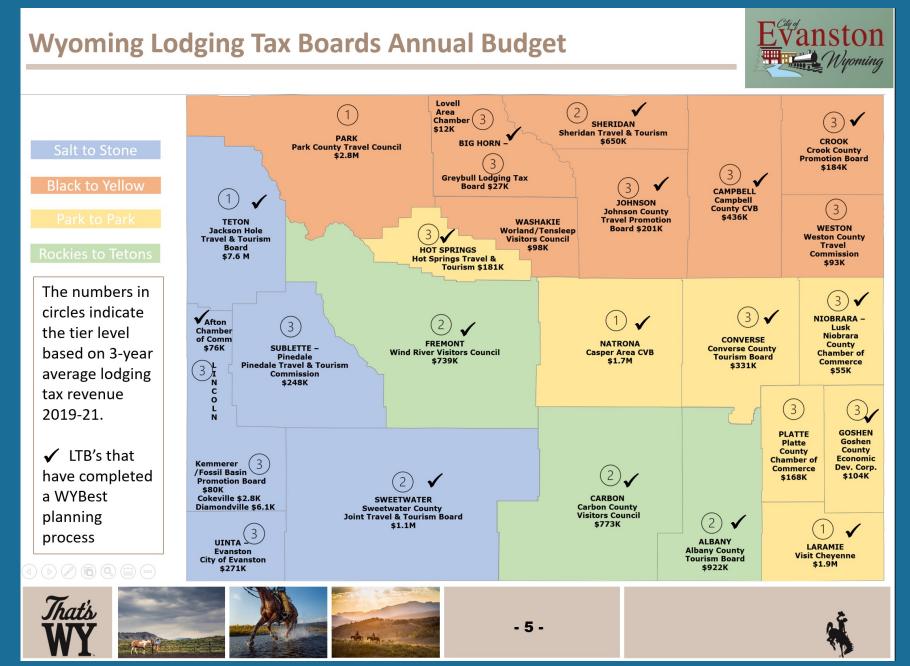
Funding Support

Emergency Preparedness

Government Support

- Affordable housing, daycare, and healthcare options for workers
  Training workforce for hospitality and management positions
- Residents and communities negative perception of tourism
- DMO values can be better aligned with local values
- Visitors impede quality of life
- Natural resources and community values are not protected
- Funding sources are not stable and sustainable
- Lack of comprehensive preparedness plans for crises
- Alignment with government policy

#### Wyoming – Statewide DestinationNEXT to Build Regional Plans



#### Niagara Falls USA – reinventing the visitor experience to be more engaging





#### Vision and Mission

#### About Destination Niagara USA

Destination Niagara USA is the official Destination Marketing Organization (DMO) for Niagara Falls and all of Niagara County, NY. Our goal is to attract leisure and convention visitors and expand the visitor experience to build a dynamic growing economy for the economic benefit of all citizens of Niagara County.

#### **Destination Vision 2028**

Niagara County, New York, is where we live, work, and play with an exceptional quality of life. The iconic Niagara Falls is the core of the visitor experience. Destination Niagara USA envisions a reenergized downtown Niagara Falls corridor as a springboard for County-wide growth. Niagara County will be widely-known not only as the home of Niagara Falls but a place rich in history, culture, outdoor life, shopping and adventure.

#### **Destination Niagara USA Mission**

We are a private non-profit with a mission to expand the economic prosperity of the Niagara County communities by generating individual and group visitation.



# **DESTINATION PLANNING**

#### DMO Mandate

- Government Relations
   & Advocacy
- Sustainability
- Equity, Diversity, Inclusion & Belonging
- Economic & Workforce Development
- Resident Engagement
   & Support



SUPPLY



#### **BECOMING A COMMUNITY SHARED VALUE**

When we observe organizations that have built a solid base of support in their community, as well as those who are less effective, we can say that there is specific set of core values that are either present or lacking. This workbook provides a deep dive into the key values of a community shared value or public good and offers insight as to how to create a roadmap for organizations to follow. These resources are complimentary for Destinations International members.

DOWNLOAD PRESENTATION & WORKBOOK

#### BECOMING A COMMUNITY SHARED VALUE

A Values Based Roadmap for Destination Organizations to Embrace Community Alignment



https://destinationsinternational.org/community-shared-value



# A COMMUNITY ALIGNMENT ROADMAP

Roadmap: Originally a map designed for motorists to get from one place to another, it has evolved to be any plan or guide to show how something is arranged or can be accomplished.

A destination alignment roadmap is designed to show destinations how to get from being a special interest to becoming a common good. It is a guide to show how building public support around a shared vision for the destination will foster support for the destination organization.

#### THE NINE KEY VALUES

These core values are the root beliefs our industry should be operating from. They inform us what is desirable. They determine our priorities. And they also do one more thing. Together, they provide a roadmap that leads to destination promotion being that shared value, that shared core value in each of our communities. And these nine core values help us build public support around a shared vision for the destination and support for the destination organization.

#### **COMMUNITY SHARED VALUE**



responsible for programs promoting a community as an attractive travel destination and enhancing its public image as a dynamic place to live and work. Through the knowledge of the destination, brand management, promotional programs, and the resulting impacts of visits by people, we strengthen the community's economic position & vitality, which provides opportunity for all the people in the destination.

Destination Stewardship is balancing economic development, sustainable tourism and quality of life.

#### **STEWARDSHIP**



Destination Innovation means to make changes in something established, especially by introducing new destination promotion methods, ideas, or products.

#### INNOVATION

#### PASSION

#### **AWARENESS**

Destination Awareness is a concern about and wellinformed interest in the history, situation, people and/or development in our specific destination. It is also something to be fostered in others.



#### **ENGAGEMENT**

**Destination Engagement is the** process of informing and listening to groups of people within our destination to address issues affecting the wellbeing of the community and promotion of the destination.



#### TRANSPARENCY

#### **INCLUSIVENESS**



**Destination Inclusiveness means** including and not excluding any area or neighborhood of our destination, any group or segment of people within our destination, or any history, culture or tradition.

#### **COLLABORATION**

**Destination Collaboration is the** action of working with our stakeholders, to produce or create something within our destination.

RELEVANCE

# Local Food = Sustainability

Union County CVB, OH

E



Meeting Planners Tour & Reunion Planners Trav EVENTS THINGS TO DO RESTAURANTS

# LIVE PROUD

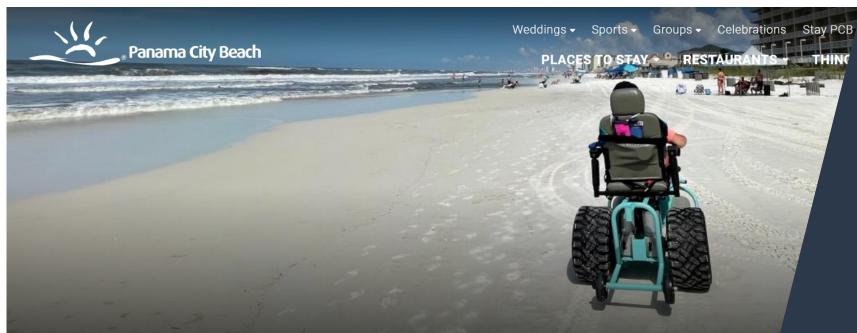
# **Out in Cbus**

# Equality for All Means All

Support and allyship for the LGBTQIA+ community has been an ongoing mission ordinance in 1984 banning bar employers from discriminating based on sexual or at the center of making our city thrive.

Pride is more than a parade here. Experience Columbus is a member of the **Int Association** (IGLTA) and Columbus has proven it's a city that's great for member better to call have. To live work, and raise a family in a welcoming and affirm The Experience Columbus LGBTQ Guide "enhances the wellbeing and visibility of our diverse community"

# FUN FOR ALL



**« Back To Previous** 

#### FUN FOR ALL

#### By Visit Panama City Beach on Mar. 21, 2022

Wheelchair users who enjoy a beach vacation will not be disappointed in Panama City Beach. V beaches – and **100 access points** – there's fun for all ages and abilities. Travel blogger Cory I

#### ACCESS TO THOSE WITH DISABILITIES

#### AccessAble

**Glasgow, Scotland** 

- AccessAble provides detailed accessibility information on over 60 venues and services for delegates with access requirements
- Methodology involves in-person visits by surveyors trained in consultation with disabled people, offering factual data for informed choices



# Workforce Our crisis to solve

- Livable wages and benefits
- Childcare (as opposed to daycare)
- Affordable Housing
- Transportation

#### Workforce

<complex-block>

 Regions
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 Research
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Reginal Office of Sustainable Tourism (ROOST):

- 1. Help our hospitality employers hire, train & retain employees
- 2. Increase awareness of hospitality as a great place to work and build a career
- 3. Increase opportunities for those in our communities



#### Workforce Development - PATH

Corpus Christi, TX

- Aims to expand engagement with educational institutions, fostering a pipeline of workforce development by introducing students to career opportunities in the hospitality industry
- Invest in the growth and retention of talent, equipping students with skills, professionalism, and networking opportunities to support their future career paths

FIND YOUR

Professions Across Tourism & Hospitality



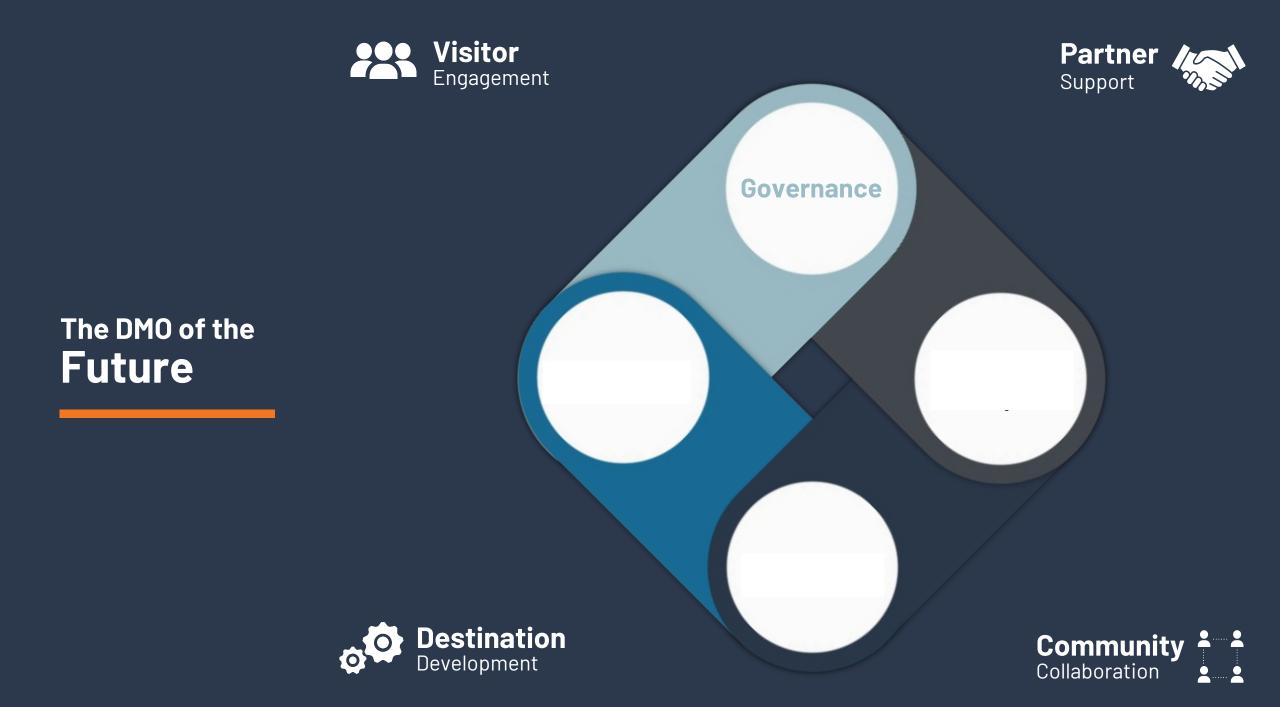


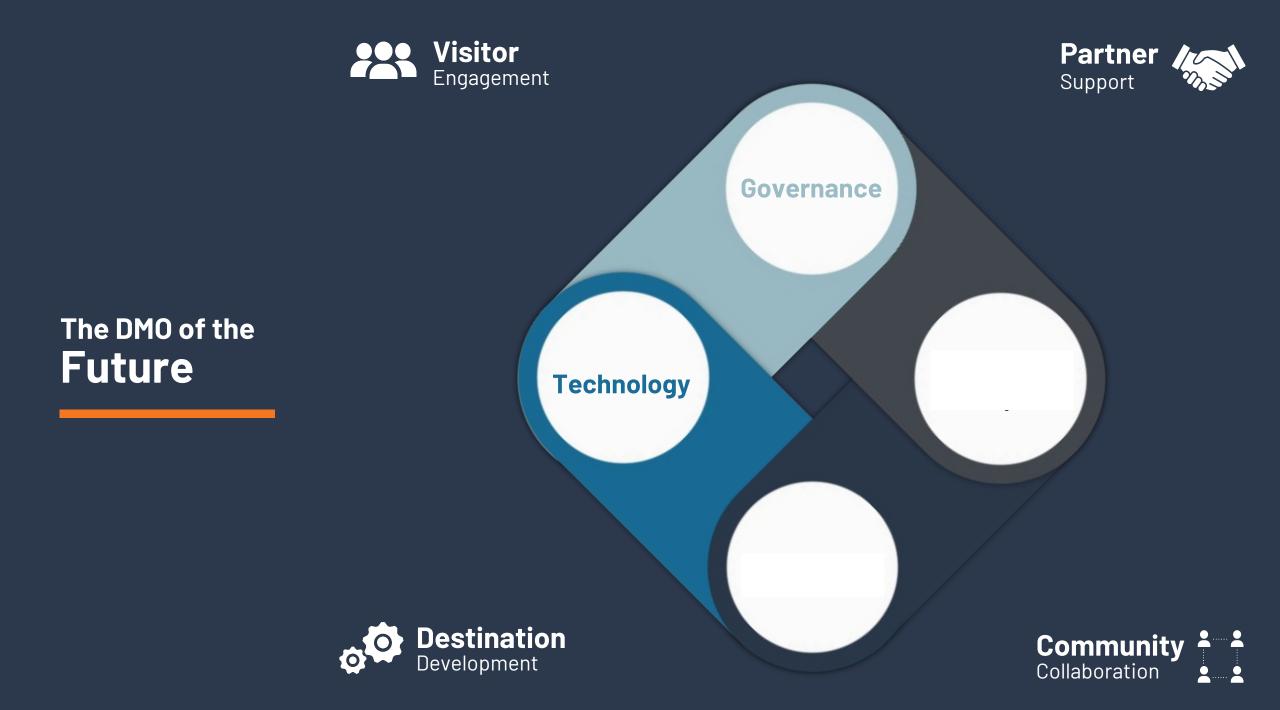


# The DMO of the **Future**

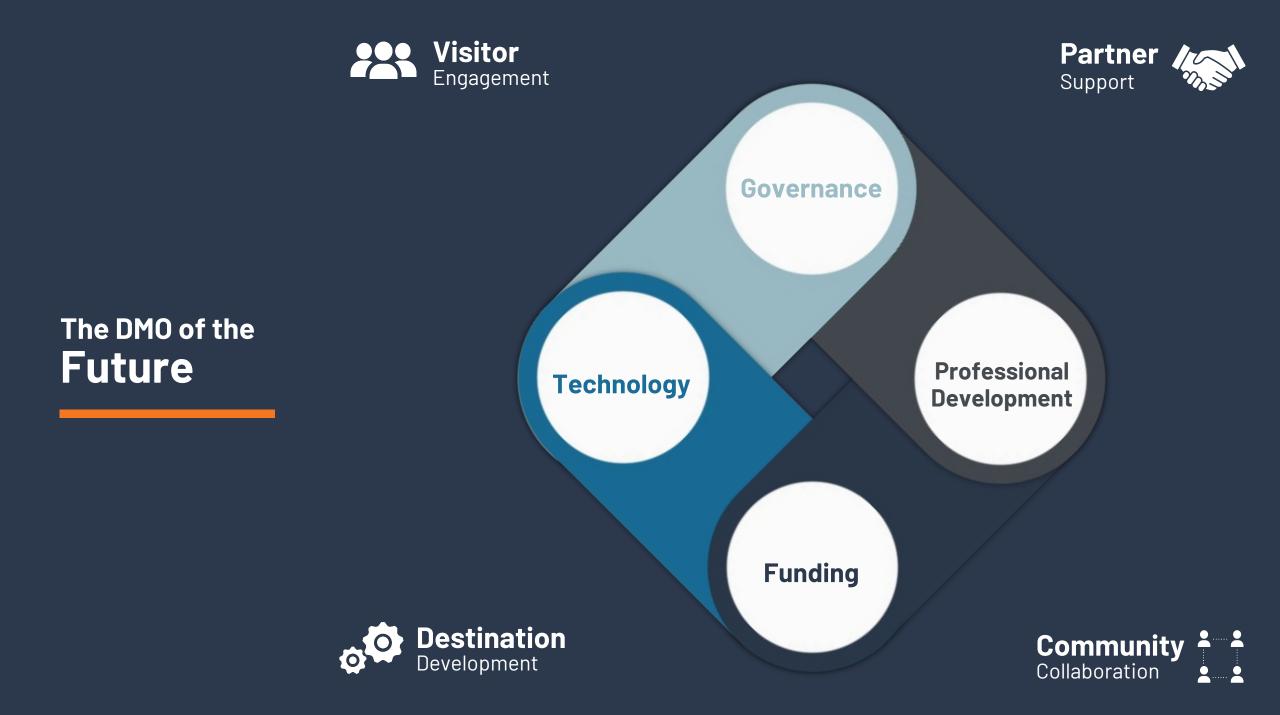












If your parents ever measured you as a child, they had you stand against a wall, and made a little pencil mark on the wall to show your growth. They did not measure you against your brother, or the neighbor's kids, or kids on tv. "Measuring Up." When you By Doe measure your Zantamata growth, make sure to only measure your today self by your past self. If you compare your relationships, your success, or your anything against anyone else, you are not being fair to you. Everyone has a different path, a different pace, and different challenges to face along the way.

# If you want to go fast, go alone

## If you want to go far, go together

- African proverb



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**Greg Oates** goates@nextfactorinc.com





# **Contact Information**

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