



# VISIT DENVER

## Board of Directors Retreat

August 24, 2023

Devil's Thumb Ranch





# **VISIT DENVER**

Board of Directors Retreat

## **2023 Futures Study**

**Greg Oates**  
MMGY NextFactor





# Visit Denver

2023 Futures Study Overview

August 24, 2023




# DESTINATION NEXT

**Greg Oates**

SVP, Innovation / MMGY NextFactor





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



DESTINATION  
**NEXT**



DESTINATIONS  
INTERNATIONAL



NextFactor



Denver



Fort Worth



Breckenridge



Greater Palm Springs



Colorado Springs



Indianapolis



Waterloo



Hilton Head Island



Greater Miami



Birmingham



Manitoba



Ann Arbor



Galena



Branson



Glacier Country



Great Lakes Bay



Vail



Jasper



New Smyrna Beach



North Myrtle Beach

# Destination Master Plans

# Strategic Planning Clients

BestCities Global Alliance

Boulder CVB

Coastal Mississippi

Destination Ann Arbor

Destination Greater Victoria

Destination Vancouver

Discover Lancaster

Discover Lehigh Valley

Discover Puerto Rico

Discover Saint John

Discover the Palm Beaches

Glacier Country Tourism

Greater Fort Lauderdale CVB

Greater Madison CVB

Greater Palm Springs CVB

Hilton Head Island CVB

Meetingplace Wonderful Copenhagen

Michigan's Great Lakes Bay CVB

New Smyrna Beach

Newport Beach & Company

Providence Warwick CVB

Roseville Visitors Association

Reno Sparks CVA

Valley Forge Tourism & Convention Board

Visit Albuquerque

Visit Anaheim

Visit Buffalo Niagara

Visit Cape Breton

Visit Dallas

Visit Denver

Visit Indy

Visit Mesa

Visit Napa Valley

Visit Newport Beach

Visit Orlando

Visit Phoenix

Visit Pittsburgh

Visit San Antonio

Visit Saint John

Visit San Jose

Visit Shreveport-Bossier

Visit Tucson



## 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



## Scenario Model

Detailed assessment of destination strength and alignment

Updated DNEXT model in 2021

375 destination assessments in 12 countries



# 2023 Futures Study

# Global Advisory Group



## ★ USA

- Chris Thompson** **Brand USA**  
**Brad Dean** Discover Puerto Rico  
**Cassandra Matej** Visit Orlando  
**Craig Davis** Visit Dallas  
**Dave Lorenz** Pure Michigan  
**Gina Trigila** Los Angeles Tourism  
**Jeff Miller** Travel Portland  
**Jill Delaney** Discover Albany  
**Jennifer Chun** Hawaii Tourism  
**Leonard Hoops** Visit Indy  
**Martha Sheridan** Greater Boston CVB  
**Melyssa Reeves** Vacaville  
**Sara Toliver** Visit Ogden  
**Victoria Isley** Asheville CVB

## ★ Europe, Middle East, Africa

- Bettina Reventlow-Mourier** **Wonderful Copenhagen**  
**Caroline Strand** Visit Stockholm  
**Corne Koch** Capetown DMO  
**Jos Vranken** Holland Tourism  
**Matthias Schultz** German Convention Bureau  
**Miha Kovačić** Slovenian Convention Bureau  
**Nelly Mukazayire** Rwanda Convention Bureau  
**Noa Sapir** Tel Aviv Convention Bureau  
**Paul Kelly** Fáilte Ireland  
**Paul Mockler** Fáilte Ireland  
**Peter de Wilde** VisitFlanders  
**Petra Stusek** Ljubljana, Slovenia  
**Rory Archibald** VisitScotland  
**Sam Johnston** Convention Bureaux of Ireland  
**Simone McCaugherty** London & Partners  
**Yrjötäpio Kivisaari** Visit Oulu  
**Kathryn Davis** Visit West (Bristol & Bath, UK)  
**Patricia Yates** Visit Britain / Visit England

## ★ South/Central America & Caribbean

- Jacqueline Mora**  
**Alejandra Zuñiga**  
**David Hidalgo**  
**Fernando Fondewilla**  
**Gilberto Salcedo**  
**Gustavo Stauffer**  
**Julián Franco**  
**Mauricio Magdaleno**  
**Nancy Mejia**  
**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

## ★ 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

A close-up photograph of hands typing on a laptop keyboard, overlaid with a blue tint.

**Disruptors**

A photograph of a group of business professionals in a meeting, gathered around a table with laptops and documents, overlaid with a blue tint.

**Customers**

A photograph of a restaurant dining table with several wine glasses and plates, overlaid with a blue tint.

**Industry**

A photograph of a large, classical building with a prominent portico and columns, overlaid with a blue tint.

**Community**

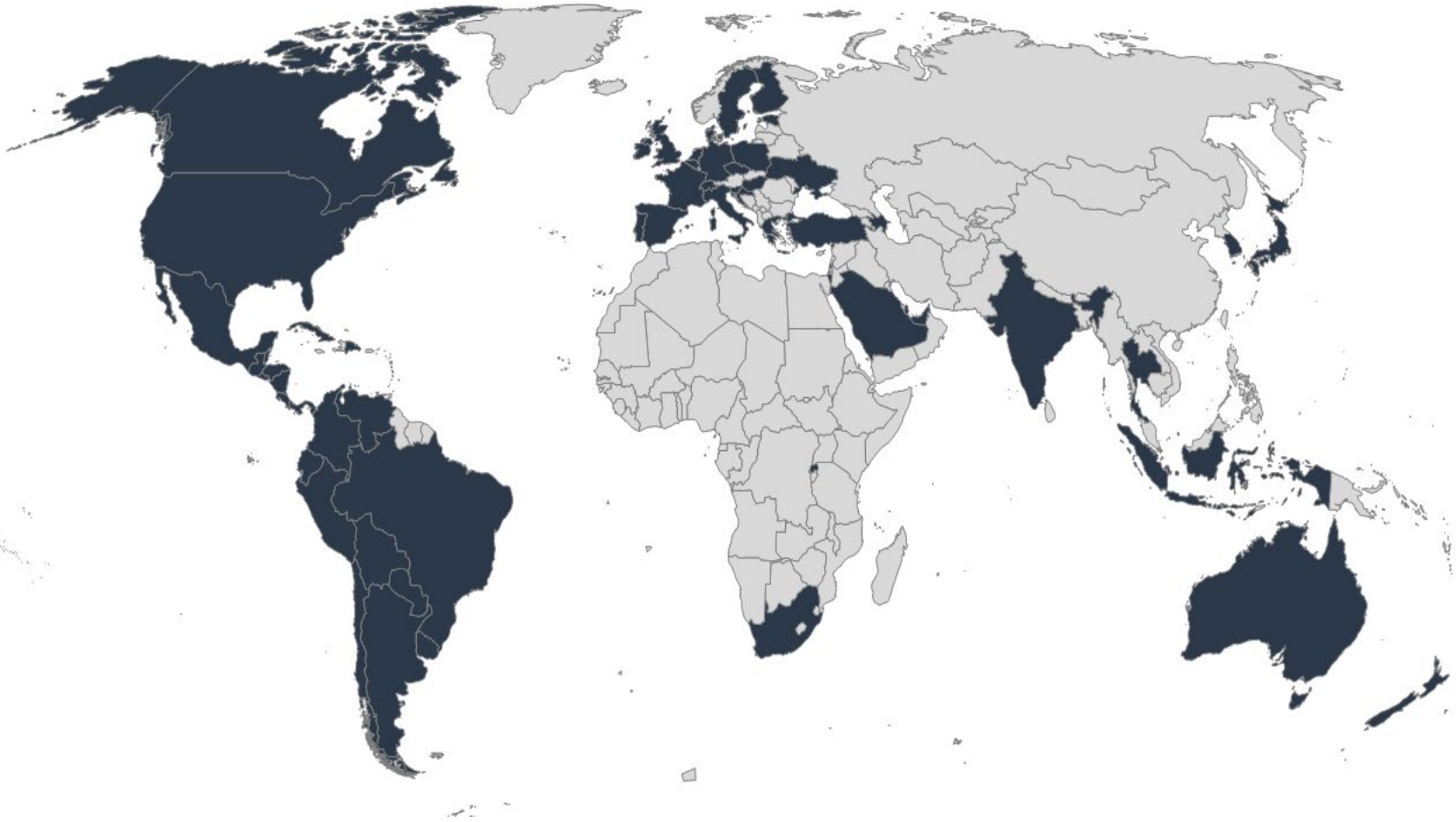


**50**  
TRENDS



**50**  
STRATEGIES

# 2023 Survey



**Survey**  
Participants

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**837**

**PARTICIPANTS**

**62**

**COUNTRIES**

# Top Trends



- 1 **+84** 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
- 5 **-4** 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 **+17** DMO/CVBs are increasing advocacy to communicate value of visitor economy to government
- 10 **+6** 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
- 13 **-7** 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


Artificial intelligence will become increasingly prevalent at an accelerated pace



# AI Powered Chat is Not New



Hi, Greg!  
Thanks for stopping by the automated San Francisco chatbot. We're here to make sure your first, next or tenth trip to San Francisco makes you want to leave your heart here.

 First we need to know: Have you been to San Francisco before?

San Francisco Travel

EXPLORE PLAN SEARCH

MEETING PLANNERS TRAVEL TRADE MEDIA PARTNERS

ALL ACTIVITIES ARTS & CULTURE DINING EVENTS HOTELS NIGHTLIFE SHOPPING

Book Online or Call 1-800-637-5196

Home Attractions City Tours and Transportation Help My Cart



(8 Photos) Click to view gallery

## San Francisco Love Tours

San Francisco, CA

from \$45

Buy tickets

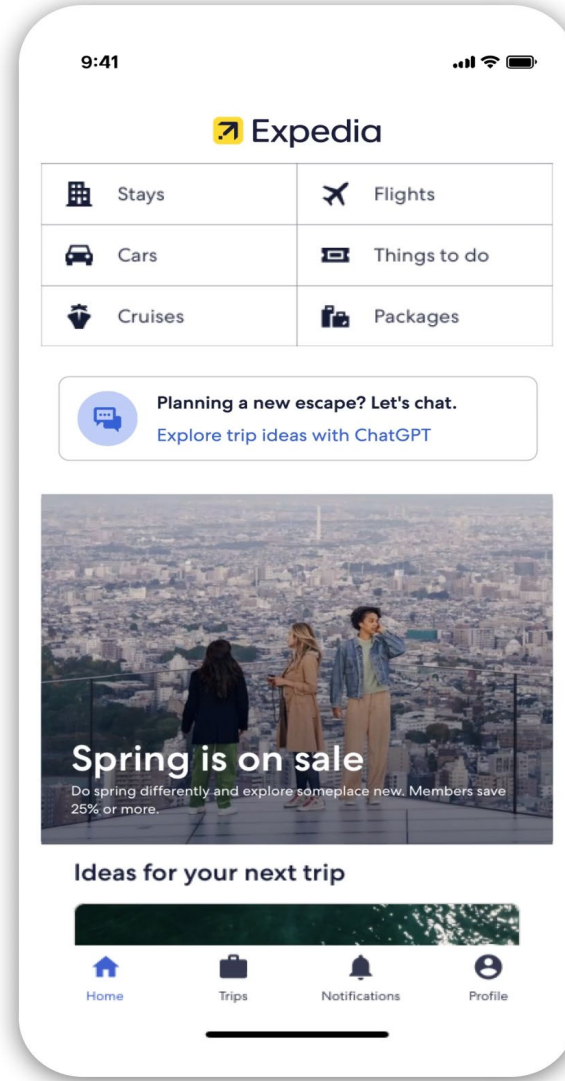
TripAdvisor Traveler Rating

 of 1059 reviews

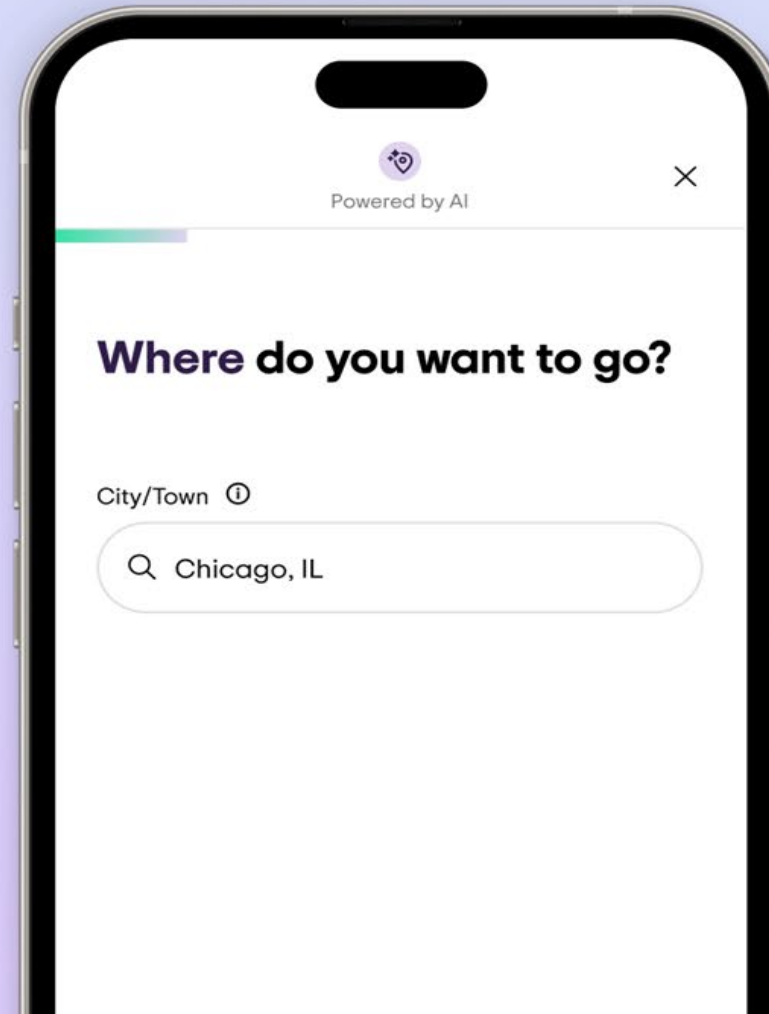
Hitch a ride on a hand painted VW bus and get to know today's San Francisco through the timeless hippie vibes and timeless songs. Travel where big tour buses are forbidden. Visit the homes of San Francisco's counter-culture icons such as The Grateful Dead, Janis Joplin and Jimi Hendrix, while grooving to entertaining and education facts and stories of this great City!

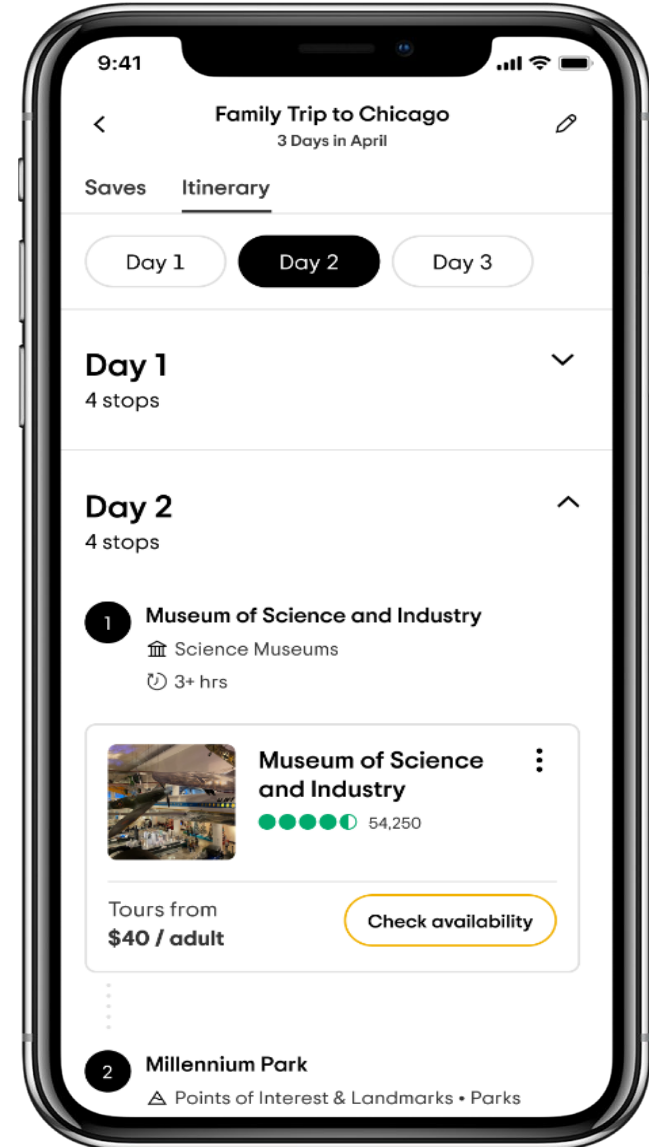
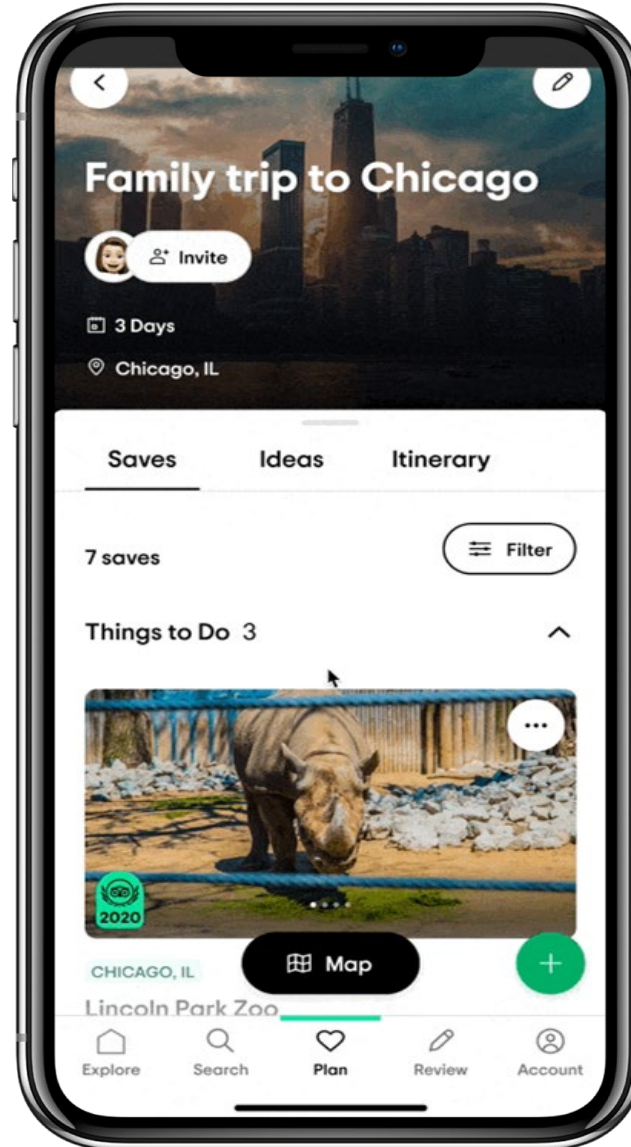
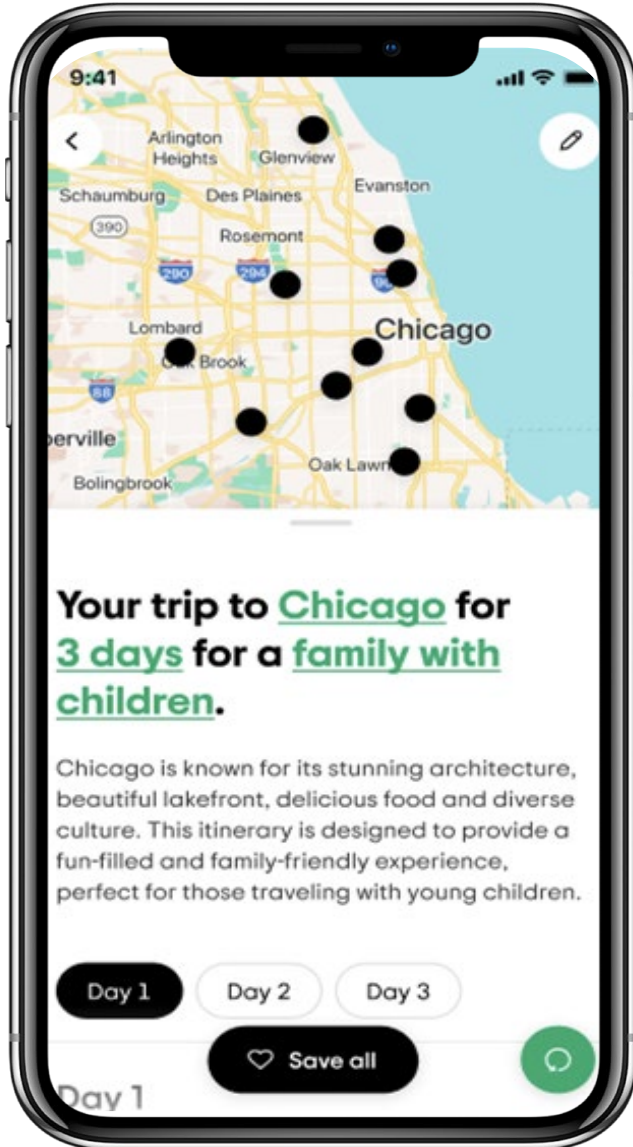
Hours

Daily Pick Up Times: 9 AM, 11 AM, 1 PM, 3 PM, 5 PM



 **Tripadvisor.**  
**Kick-start your  
travel planning**







 TikTok  
@maxmilespoints

**AI Trip  
Planning Tool**

 **Tripnotes**

2

Customers are increasingly seeking a unique, authentic travel experience

# Mesa





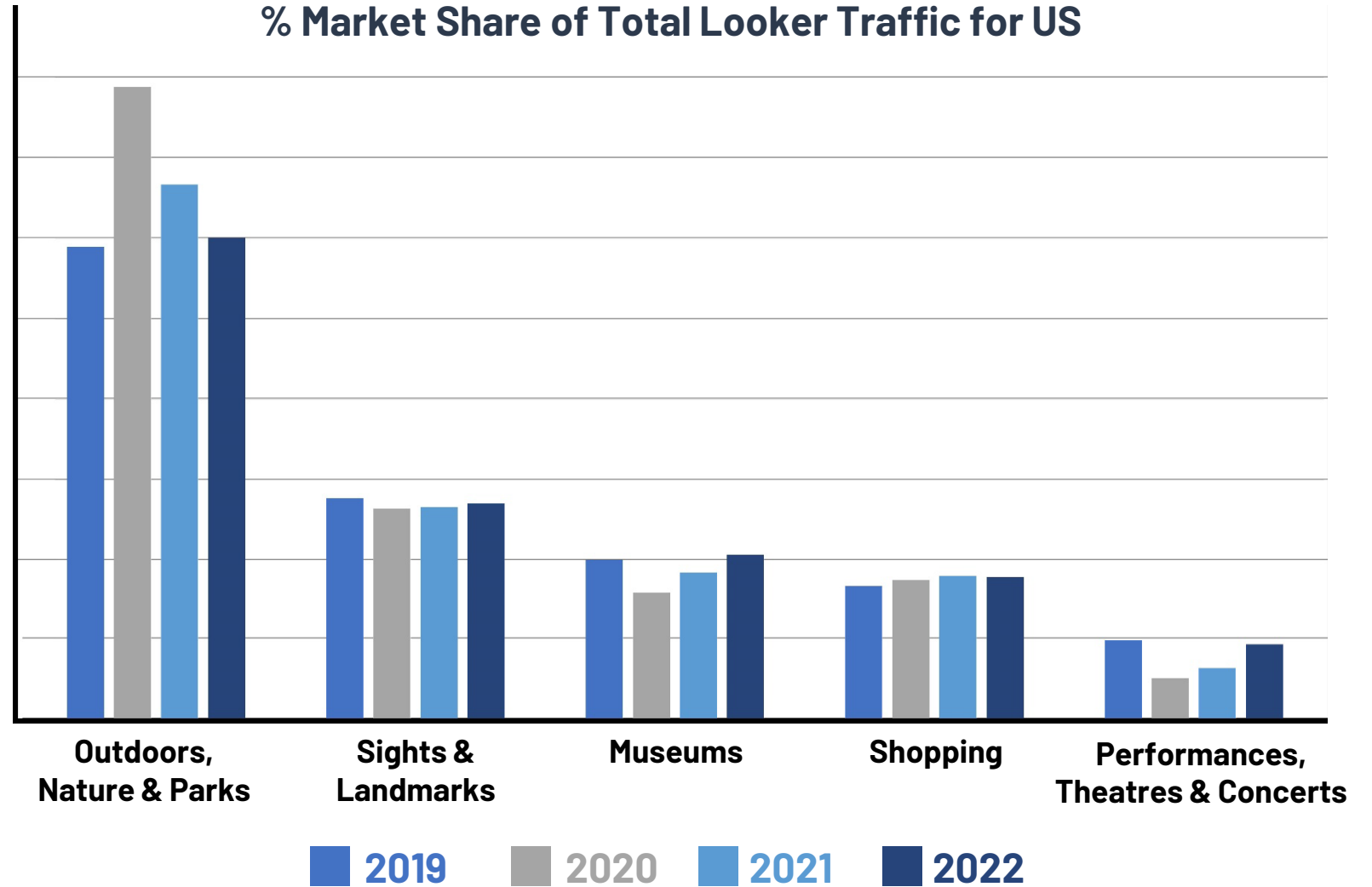
# Experience NEXT

 **Tripadvisor**

+

 **NextFactor**

### % Market Share of Total Looker Traffic for US



4

Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

5

Greater industry, community and government alignment is driving destination competitiveness and brand



# Top Strategies



- 1 **NEW** Protect revenue sources to maintain current funding levels
- 2 **+3** Focus on developing authentic experiences for the customer
- 3 **+6** Better integrate tourism and economic development
- 4 **-** Build the destination brand around the community's goals, values and creative energy
- 5 **+15** Have a greater role in destination and product development
- 6 **+1** 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
- 8 **-7** Focus significant attention on content creation and dissemination
- 9 **NEW** 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
- 11 **NEW** 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

1

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

**2** Focus on developing authentic experiences for the customer

**5** Have a greater role in destination and product development

**6** Develop a destination master/management plan to define long-term strategy

**9** Develop a data-driven plan for a more sustainable visitor economy

**10** Align the visitor experience and quality of life for residents in my community

**14** Develop and support new events in the destination



4

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



8

Focus attention on content creation and dissemination




# 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   |
| <b>Data research and business intelligence</b> | 5       | 2  |
| <b>Destination and product development</b>     | 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   |
| <b>Visitor satisfaction</b>                  | 6       | 2  |
| <b>Marketing ROI</b>                         | 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  |
| <b>Resident sentiment</b>                    | 13      | 7  |
| Earned media metrics                         | 14      | 16  |
| Equity, diversity, and inclusion             | 15      | 11  |
| Long-term/legacy impacts from events         | 16      | 17  |
| Conversion metrics                           | 17      | 15  |
| Environmental stewardship impacts            | 18      | 18  |
| Air service                                  | 19      | 19  |
| Event bid success ratio                      | 20      | 20  |
| Venue profits                                | 21      | 21  |

# Mandate Map



# DMO Mandate

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## DEMAND



**Visitor**  
Engagement



**Partner**  
Support

## SUPPLY



**Destination**  
Development



**Community**  
Alignment



## DMO Mandate

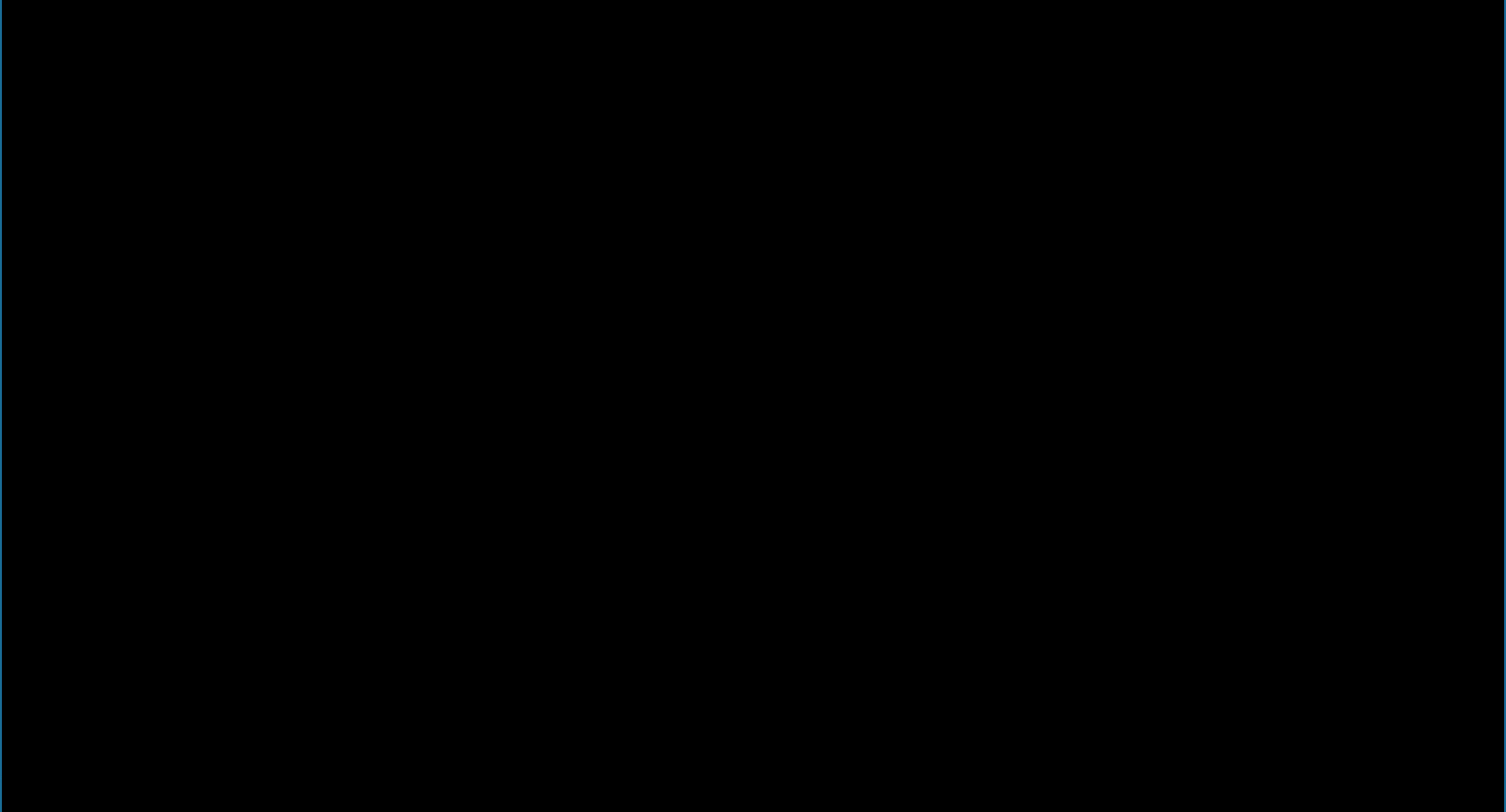
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### DEMAND



**Visitor**  
Engagement

- Digital storytelling
- Brand management
- AI marketing
- Visitor servicing
- Loyalty program



## DMO Mandate

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### DEMAND

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



**Partner**  
Support

## DMO Mandate

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### Destination Development

## SUPPLY

- Product (experience) development
- Neighborhood development/placemaking
- Air access
- Infrastructure development
- Accessibility



**Fort Worth**



**Miami**



**City of SeaTac**



**Vancouver**

# NEW YORK CITY

TOURISM + CONVENTIONS



Itinerary

## 10 Small Businesses to Visit in Chinatown

Welcome to Chinatown shares 10 places they love to shop.

[LEARN MORE →](#)



Article

## Shop Manhattan Small Businesses and Give Back

These BIPOC-owned businesses in Manhattan give back to the community.

[LEARN MORE →](#)



Article

## Shop Brooklyn Small Businesses and Give Back

Shop these five BIPOC-owned stores in Brooklyn to help support local and global communities.

[LEARN MORE →](#)



Article

## Shop Queens Small Businesses and Give Back

Shop these six BIPOC-owned stores in Queens to help support local and global communities.



Article

## Visit These NYC Businesses with Ties to Hip-Hop

A number of small businesses across the boroughs have rap royalty in their DNA.



Article

## Get to Know These Small Businesses in the South Bronx

These entrepreneurs in the South Bronx are reinvigorating the borough.

# DMO Mandate

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## SUPPLY

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



**Community**  
Alignment

# Unified Brand Strategy - Unbelievably Real

Orlando, FL

- ▶ Visit Orlando and Orlando Economic Partnership joined forces to create new branding campaign for the region in May 2022
- ▶ Mural created by local artist in downtown Orlando





# Workforce Development - PATH

Corpus Christi, TX

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- ▶ Engage 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



# AccessAble

Glasgow, Scotland

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- ▶ 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



# DMO of the Future





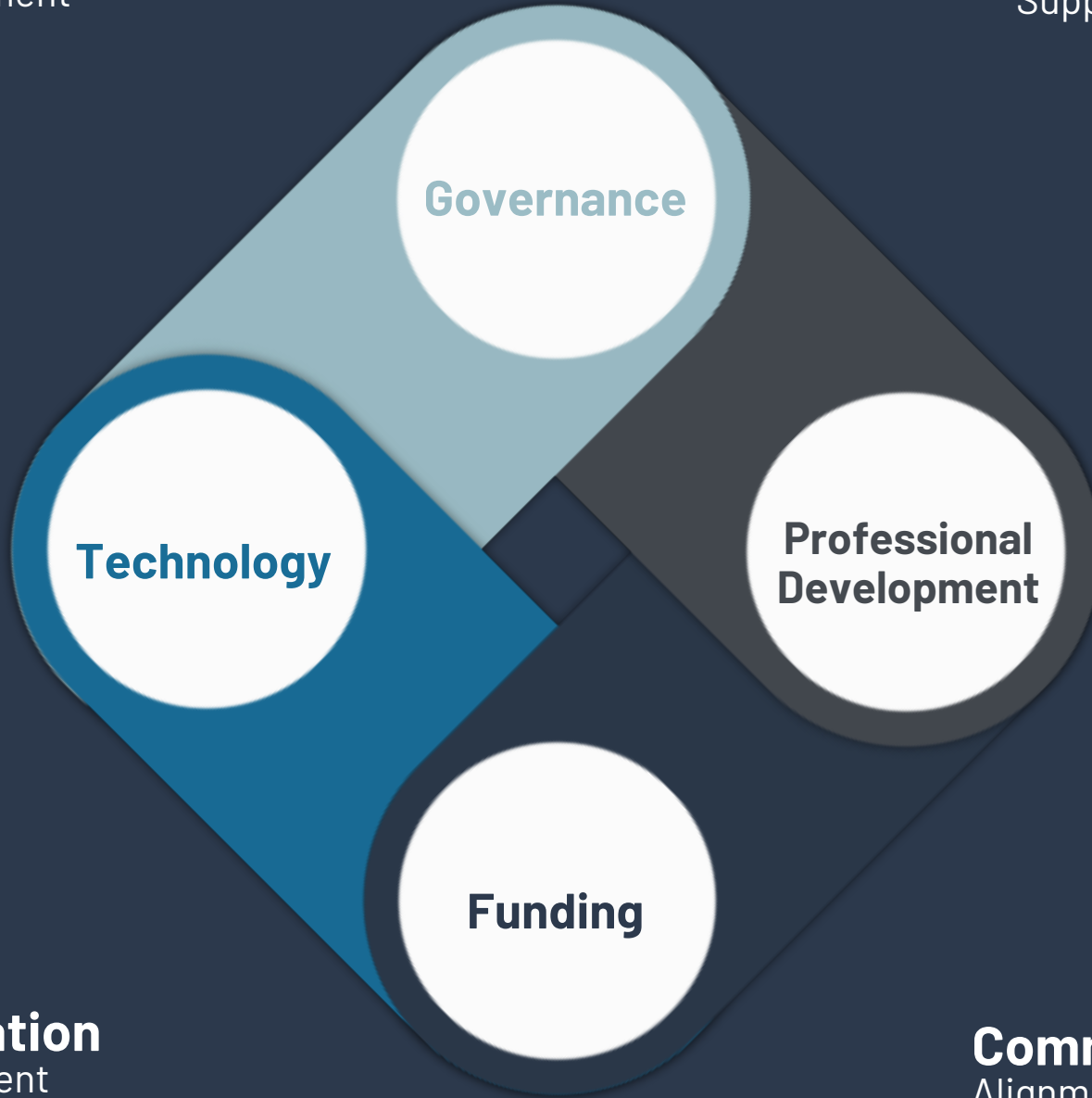
**Visitor**  
Engagement

**Partner**  
Support



# The DMO of the Future

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**Destination**  
Development

**Community**  
Alignment



# Thank You!

**Paul Ouimet**

pouimet@nextfactorinc.com

**Greg Oates**

goates@nextfactorinc.com



DESTINATION  
**NEXT**



**MMGY** NextFactor