



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



## THE FUTURES STUDY

- Overview of trends and strategies for destination organizations worldwide
- Previous studies in 2014, 2017 & 2019
- New Study in July 2021

## SCENARIO MODEL

- Detailed assessment of destination strength and alignment
- 300 destinations in 12 countries
- Updated DNEXT model in 2021

# THE 2021 FUTURES STUDY





# 6 Global Panels





## **Disruptors**

(Technology, business, health,  
policy)

## **Community Leaders**

(Government, economic  
development, education)

## **Industry/Association**

(Leading industry thought  
leaders)

## **Supply Chain**

(Hotels, airlines, cruise lines,  
venues, service suppliers)

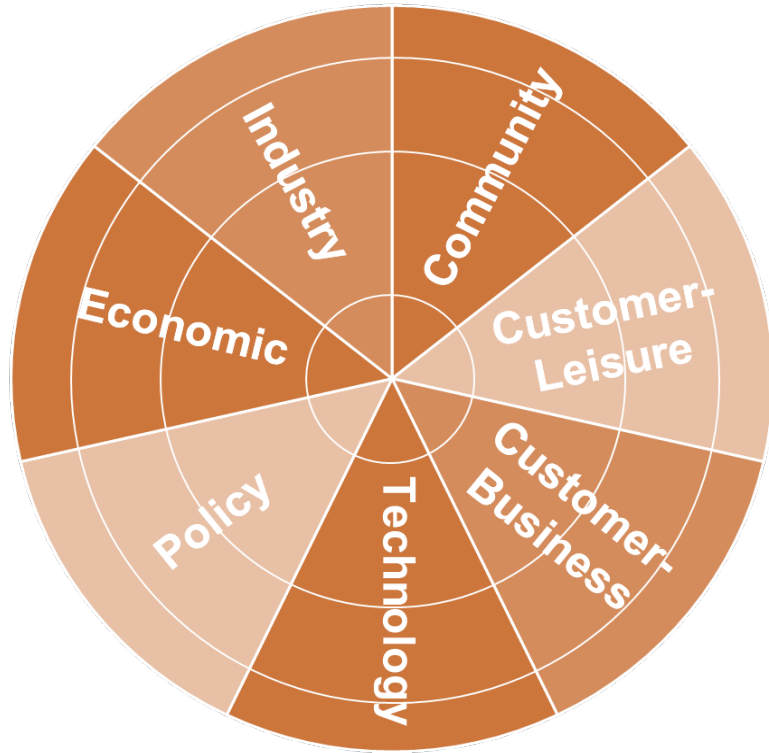
## **Clients**

(Meeting planners, event  
organizers, tour operators)

## **Other Sectors**

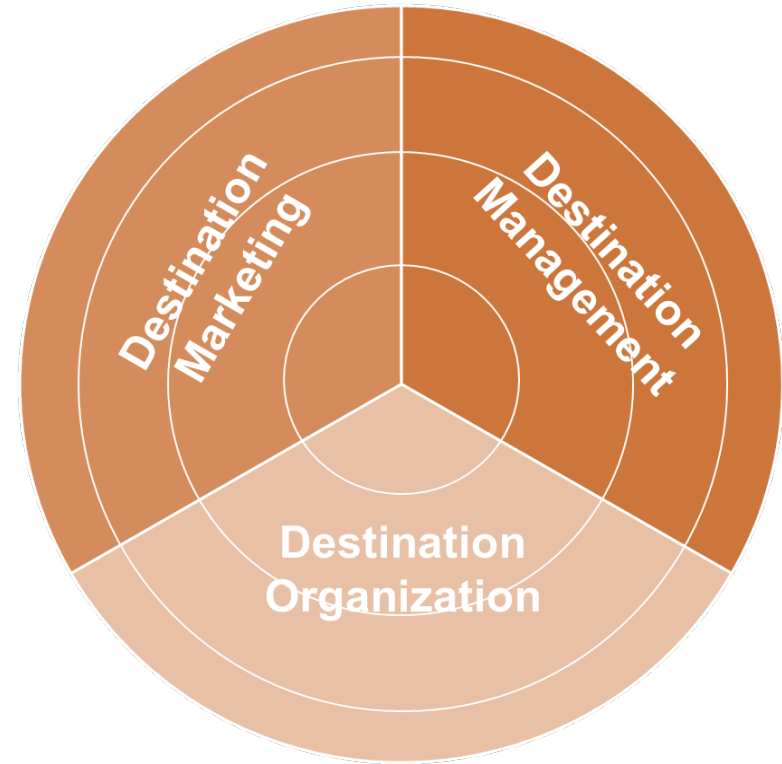
(Key sectors beyond the  
visitor industry)

# Strategic Radar Maps



100

Trends



80

Strategies



# 2021 Futures Study Participants

706

Participants

52

Countries





# TOP TRENDS

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# Top Trends

1. Greater industry, community and government alignment is driving destination competitiveness and brand
2. Customers are increasingly seeking a unique, authentic travel experience
3. Content creation and dissemination by the public across all platforms drives the destination brand and experience
4. Video becomes the new currency of destination marketing and storytelling
5. Travelers are demanding more information, control, interaction and personalized information
6. Travelers are seeking more personal enrichment and wellbeing
7. Social media's increasing prominence in reaching the travel market
8. Mobile devices and apps are becoming the primary engagement platform for travelers
9. Customers increasingly expect highly curated and customized destination content
10. Travelers want assurances of high standards of cleanliness and hygiene
11. Better, more holistic data management platforms are helping optimize strategy
12. Air access to a destination is key factor in attracting business travelers
13. Harvesting data and developing business analytics differentiate successful tourism destinations
14. Greater demand for more dynamic outdoor experiences
15. Business event customers looking for better collaboration with destinations to achieve greater business outcomes



# #1

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**Aligning government,  
community and industry  
priorities drives  
destination  
competitiveness**



# Visit Denver – Community Organization/Business Support

- Amp the Cause
- Asian Chamber of Commerce
- Biennial of the Americas
- Brand USA
- The Center on Colfax
- CherryArts
- City Club of Denver
- Civic Center Conservancy
- Colfax Marathon Partnership
- Colorado Association of Destination Marketing Organization
- Colorado Black Chamber of Commerce
- Colorado Business Committee for the Arts
- Colorado Competitive Council
- Colorado Concern
- Colorado Hotel and Lodging Association
- Metro Denver Lodging Council
- Colorado Restaurant Association
- Colorado Ski Country USA
- Colorado Society of Association Executives
- Colorado Sports Hall of Fame
- Colorado Tourism Office
- Colorado Women's Chamber of Commerce
- Denver Architecture Foundation
- Denver Department of Housing Stability
- Denver Film Society
- Denver Metro Chamber of Commerce
- Denver Police Foundation
- Denver Rescue Mission
- Denver Theatre District
- Destination Colorado
- Downtown Denver Partnership
- Dr. Martin Luther King, Jr. Colorado Holiday Commission
- EAT Denver
- Girl Scouts of America
- Hispanic Chamber of Commerce of Metro Denver
- I Have a Dream Foundation
- Inter-Neighborhood Cooperation
- Japan America Society of Colorado
- Kiwanis Club of Denver
- Meetings Industry Council
- Metro Denver Economic Development Corporation
- Metro Mayors Caucus
- Mizel Institute
- National Western Center
- NEWSED
- Rocky Mountain Business Travel Association
- Rocky Mountain Chapter of ASAE, IAEE, MPI, PCMA, SGMP
- Rocky Mountain Indian Chamber of Commerce
- Rocky Mountain International
- Scientific and Cultural Facilities District
- Slow Food USA
- Su Teatro Cultural and Performing Arts Center
- Tour Colorado
- Tourism Industry Association of Colorado
- University Programs statewide
- Urban Spectrum
- United States Travel Association
- World Trade Center

# #2

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**Customers increasingly  
seeking a unique,  
authentic travel  
experience**





# #6

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**Travelers are seeking more  
personal enrichment and  
wellbeing**





# #15

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**Business event customers  
want better collaboration  
with destinations to  
achieve greater outcomes**





# TOP STRATEGIES

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# Top Strategies

1. Focus significant attention on content creation and dissemination strategies
2. Play more of a central role in advocacy in my destination
3. Enhance engagement with the local community to manage future considerations for the visitor economy
4. Build the destination brand around the community's goals, values and creative energy
5. Focus on developing authentic experiences for the customer
6. Develop new KPIs to measure economic & social impact of tourism/business events beyond visitor volume
7. Develop a destination master/management plan to define long-term destination development
8. Be more involved in economic development initiatives
9. Invest more effort and resources into video content to market the destination
10. Better integrate tourism, economic development and talent attraction
11. Connect visitor experience with the quality of life of residents in my community
12. Improve and align data management and digital strategy to optimize marketing ROI
13. Develop strategies to protect what we have while attracting events and visitation to our community
14. Protect and steward our natural environment and our authentic social and cultural characteristics
15. Form more strategic alliances outside the visitor industry

# Top Strategies

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# #1

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**Focus significant attention  
on content creation and  
dissemination strategies**



Every **minute**  
there are...

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**4.3 million**

Google searches

**510,000**

FaceBook comments

**3.5 million**

YouTube videos watched

**350,000**

tweets

**6 million**

Amazon shoppers

**69,000**

Instagram photos posted



# #4

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



# #8

**Be more involved in  
economic development  
initiatives**

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# #10

**Better integrate tourism,  
economic development  
and talent attraction**







# EVOLVING ROLES

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# Current Organization Roles

Organization Role	Current
Destination marketing	1
Brand management	2
Destination information resource	3
Community relations	4
Industry advocate	5
Broader economic development	6
Destination and product development	7
Data research and business intelligence	8
Meetings and conventions sales	9
Equity, Diversity, Inclusion advocate	10
Visitor experiences and services	11
Health and safety resource	12
Sustainability advocate	13
Major event partner/developer	14
Convention services	15
Leisure sales (group tour & independent)	16
Workforce development	17
Venue manager/operator	18

# Current & Ideal Organization Roles

Organization Role	Current	Ideal	
Destination marketing	1	1	
Brand management	2	2	
Destination and product development	7	3	↑
Data research and business intelligence	8	4	↑
Destination information resource	3	5	
Community relations	4	6	
Industry advocate	5	7	
Visitor experiences and services	11	8	↑
Broader economic development	6	9	
Meetings and conventions sales	9	10	
Sustainability advocate	13	11	
Equity, Diversity, Inclusion advocate	10	12	
Major event partner/developer	14	13	
Workforce development	17	14	↑
Health and safety resource	12	15	
Leisure sales (group tour & independent)	16	16	
Convention services	15	17	
Venue manager/operator	18	18	

A photograph of a group of people in a social setting, possibly a bar or club, with warm, golden lighting. In the foreground, a woman with blonde hair is seen from the side, wearing a dark, textured sweater. Behind her, another woman with glasses is smiling. The background is blurred, showing other people and interior lights.

# TRANSFORMATIONAL OPPORTUNITIES

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# 3 Transformational 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

# **VisitScotland's 'Journey to Change'**

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**New business events  
strategy leverages Scottish  
expertise  
"to focus minds on global  
solutions"**



# 3 Types of Alignment Strategies

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## Coalition



Visit Denver – Air Service  
Development



Portland Means Progress



Grand Action 2.0

## Formal Partnership



Tourism Tomorrow Inc.



Greater Topeka Partnership



CVB & Invest Monterrey

## Mergers / Integration



Tourism & economic development



VSA & Riverwalk Association



CofC & CVB



# Made Possible in Lehigh Valley

Lehigh Valley, Pennsylvania

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- Lehigh Valley advertising itself as a great place to live due to low cost of living and high accessibility to education, work opportunities, and entertainment



# Visit Orlando and Orlando Economic Partnership

Orlando, FL

- Developed “Unbelievably Real” brand platform, in collaboration with the two organizations, to appeal to all audiences
- To engage Orlando residents and cultivate new methods to showcase pride in Orlando, also launched O.U.R. Culture Project (Orlando Unbelievably Real Culture Project)





# Digital Creative Services Studio

## Discover Puerto Rico

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- Post-COVID, Discover Puerto Rico established creative studio services for sale to third-party brands, businesses and organizations also promoting local brands & destination
- Focus on providing video and production services, in the form of digital series, TV ads, and virtual reality from pre to post production
- Numerous clients including Casa Bacardi, Distrito T-Mobile, Palacio Provincial Hotel



# Governance

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- Equity, Diversity & Inclusion
- Hotel Owners
- Community Groups
- Key Stakeholders







## 3 Pillars of Sustainability

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**Environmental**  
**Sociocultural**  
**Economic**



# Valencia is First City to Measure Carbon Impact of Tourism

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“The only long-term guarantee for tourism is that it is economically, socially and environmentally sustainable”

- Visit Valencia



# Denver – Destination Sustainability Efforts

## VISIT DENVER Sustainability

Denver's Office of Climate Action, Sustainability, and Resiliency has led the way in decreasing the city's greenhouse gas emissions and prioritizing a sustainable future for the city. Likewise, VISIT DENVER collaborates with our venues, hotels, and other partners to ensure we are offering sustainable options that allow both the community and natural environment to thrive. VISIT DENVER supports public transit options, eco-friendly meeting spaces, our green vendors, and creating a walkable downtown for all to enjoy. Below are a few of VISIT DENVER's sustainability efforts as well as those from our biggest partners:

- **VISIT DENVER Environmental and Sustainability Industry Recognitions:**
  - The first convention and visitor's bureau to achieve the ASTM/APEX Level Two certification for a sustainable meeting destination. The criteria within the certification includes a prioritization to sustainable procurement, assisting planners with options for donations and volunteer opportunities, and working with our members to assist in their sustainability journey.
  - In 2019, VISIT DENVER was proud to have been certified to the Colorado Environmental Leadership Program at the Gold Level. This program focuses on the tracking of our metrics and implementing a sustainability plan for our organization.
- **Hotel Sustainability Reports:** We surveyed our downtown hotels on their sustainability practices, including Waste Management, Energy Conservation, Air Quality and more. Our survey provides meeting planners and visitors with comparable information regarding the sustainable practices of our hotels.
- **Green Vendor Directory:** VISIT DENVER provides a one-stop resource to showcase our vendors' sustainability practices. Our Green Vendor Directory allows visitors to sort businesses by certification type and practice. We are proud to support and promote our partners and their sustainable efforts.
- **Colorado Convention Center's commitment to sustainability:**
  - CCC's certifications include LEED Existing Building – Operations and Maintenance Level GOLD; ISO Standard 14001 – Environmental Management System; CDPHE Colorado Environmental Leadership Program (ELP) - Gold
  - The CCC's Waste Management Program, Energy and Water Conservation efforts, Air Quality policies, and sustainable catering support the CCC's commitment to making all events held at the Convention Center sustainable.
- **Denver International Airport's dedication to energy efficiency and the environment:** The third busiest airport in the world holds a strong commitment to sustainability. Programs like the Environmental Management System, wastewater reduction, airport solar program, single-stream recycling and a partnership with the Colorado Green Business Network support the airport's goals to reduce its impact on the environment. In addition, the RTD A Line offers a "green" way to travel to and from the airport.



THE GDS-INDEX

# Methodology

BENCHMARKING DESTINATIONS TO  
CREATE A REGENERATIVE TOURISM  
INDUSTRY

[View our Methodology](#)





# Sustainable & Equitable Destination Development



EXPLORE  
EDMONTON

Visit  
tucson

VISIT  
DURANGO  
COLORADO

WASHINGTON  
DC

TOURISME /  
MONTREAL

QUÉBEC  
l'accent  
d'Amérique

1 | 

Benchmark to  
understand current  
strengths and  
weaknesses

2 | 

Engage and consult  
stakeholders

3 | 

Co-create a new  
vision and  
regenerative tourism  
strategy

4 | 

Build capacity,  
products and new  
skillsets for recovery

5 | 

Create and share a  
new destination  
sustainability story  
and brand  
proposition

6 | 

Achieve third party  
destination  
certification

7 | 

Catalyse economic  
growth, nature  
regeneration &  
social impact

Phase 1

Phase 2

Phase 3



## Welcome to Washington, DC, one of the best and most diverse cities in the United States.

We hope visitors understand opportunities to learn more about the people in our city and make connections with individuals from a variety of cultures, races and backgrounds. As the official destination marketing organization for the city, we welcome all people with open arms and are committed to showing locals and visitors alike that the District is a place that promotes and validates diversity, equity and inclusion.

Our hope with this page is to empower people by embracing the diversity in our city, learning about progress happening here and understanding ways to create lasting change within our communities. We encourage you to engage with our DEI content and community whether you plan to visit, learn or meet in Washington, DC.

Kind regards,

**Elliott L. Ferguson, II**  
President & CEO,  
Destination DC

## Destination DC

“Our hope is to empower people to create lasting change within our communities”



# Tourism Accelerator

San Diego, California

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- Providing resources for businesses owned by people of color, LGBTQ+, women and veterans
  - Financial coaching;
  - UC San Diego Courses;
  - Dedicated mentors;
- Helping businesses better build connections in the local tourism industry



# Workforce Development

Ann Arbor, MI

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





CANADA 

**CANADA.  
MORE THAN  
TRAVELLING.**







# PANAMA

LIVE FOR MORE

[visitpanama.com](http://visitpanama.com)

# FEARLESS FEMALES.

MEET ATHLETES, ENTREPRENEURS, AND LEADERS WHO ARE CONTINUING JACKSON HOLE'S LEGACY OF TRAILBLAZING WOMEN.



**HADLEY HAMMER**

Pro Big-Mountain Skier



**SLOANE ANDREWS BERGIEN**

Fly Fishing Guide



**CLARENE LAW**

Hotelier, Former State  
Legislator



**KATHRYN MAPES TURNER**

Award-Winning Artist,  
Fourth Generation Local



**LYNSEY DYER**

Professional Athlete, Co-  
founder of SheJumps



**NONA YEHIA AND CAROLINE  
ESTAY**

Founders of Vertical Harvest



**CRYSTAL WRIGHT**

Barrel Racer, Freeski World  
Champion



**JODY VALENTA**

President and COO of  
Roadhouse Brewing Co.



**SOFIA JARAMILLO**

Professional Photographer



**TORI ARZT**

Head Chef, Glorietta  
Trattoria

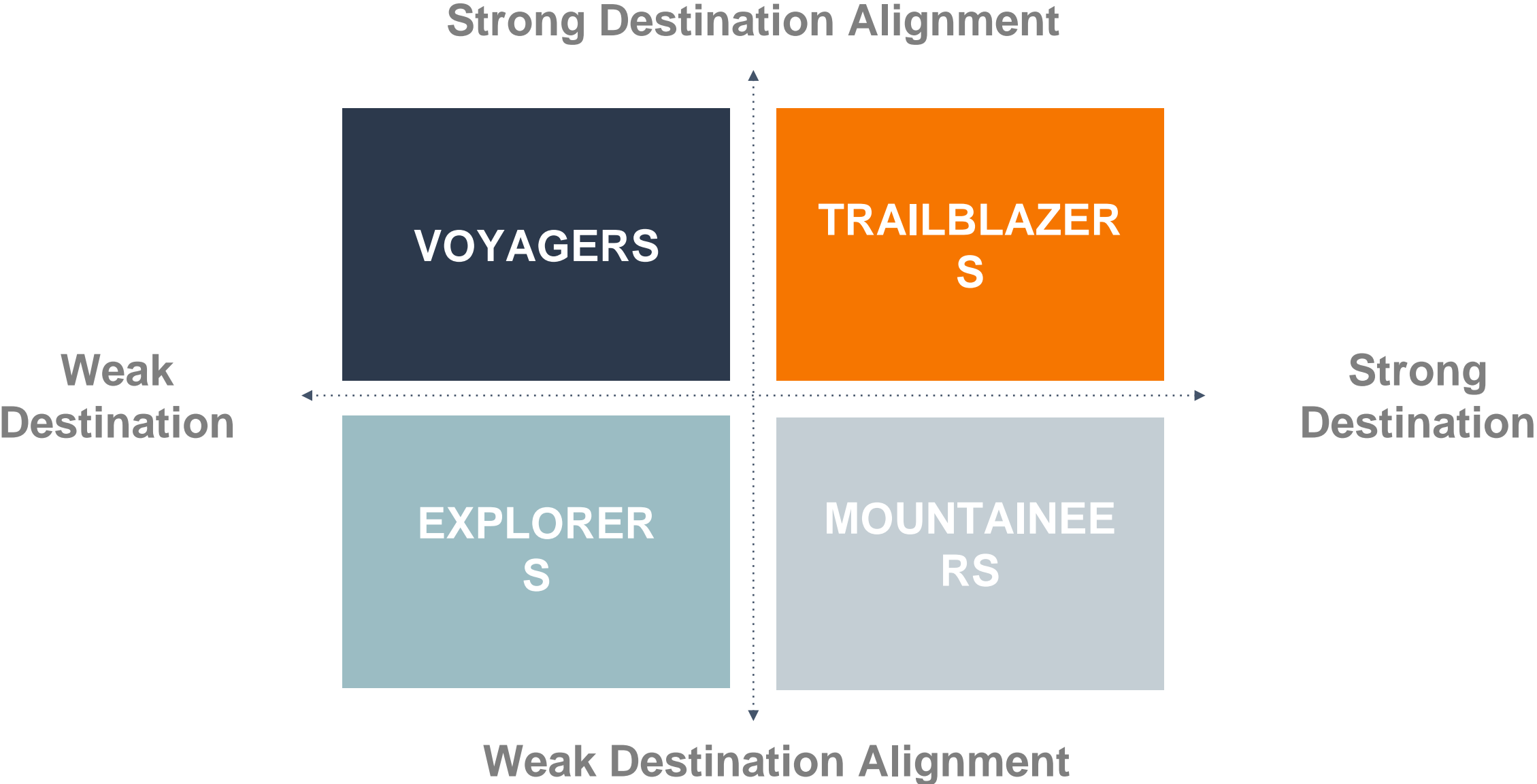


# DestinationNEXT Assessment and Scenario Model

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August 9, 2022

# DestinationNEXT Scenario Model





# Destination Strength Variables



Attractions &  
Experiences



Arts, Culture &  
Heritage



Dining, Shopping &  
Entertainment



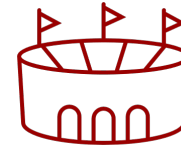
Outdoor Recreation



Conventions &  
Meetings



Events & Festivals



Sporting Events



Accommodation



Local Mobility &  
Access



Destination Access

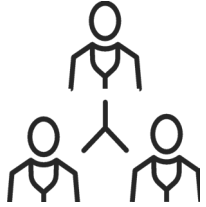


Communication  
Infrastructure



Health & Safety

# Destination Alignment Variables



Business  
Support



Community Group &  
Resident Support



Government  
Support



Organization  
Governance



Workforce  
Development



Hospitality  
Culture



Equity, Diversity  
& Inclusion



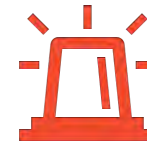
Funding  
Support & Certainty



Regional  
Cooperation



Sustainability  
& Resilience



Emergency  
Preparedness



Economic  
Development



# Destination Strength

## Lowest-Scoring Variables since 2021

Rank	Variable	Variable Statement	Score (1-5 scale)
1	Health & Safety	Homelessness	2.57
2	Destination Access	Inter-city public transportation options	2.59
3	Local Mobility	Sufficient ride share services	2.59
4	Local Mobility	Adequate public transportation	2.61
5	Local Mobility	Road year-round capacity	2.65
6	Conventions & Meetings	Strong reputation for hosting meetings and events	2.69
7	Local Mobility	Directional multi-language signage	2.72
8	Local Mobility	Bicycle-friendly destination	2.73
9	Destination Access	Airport is accessible with public transit	2.82
10	Communication	Broadband capacity	2.84
11	Local Mobility	Walkable destination	2.85
12	Communication	Free Wi-Fi in outdoor/public areas	2.87
13	Accommodation	Short-term rentals impact on quality of life	2.97
14	Local Mobility	Adequate parking facilities	3.01
15	Health & Safety	Safe from crime	3.03

# Destination Alignment

## Lowest-Scoring Variables since 2021

Rank	Variable	Variable Statement	Score (1-5 scale)
1	Workforce	Adequate healthcare options	2.71
2	Workforce	Public transportation	2.73
3	Workforce	Adequate frontline hospitality workers	2.76
4	Workforce	Adequate management workers	2.93
5	Hospitality Culture	Adequate customer service training programs	2.99
6	Resident Support	Residents' perception of tourism industry	3.07
7	Funding Certainty	Sufficient DMO cash reserve to navigate through a crisis	3.12
8	Workforce	Positive labor relations environment	3.17
9	Business Support	Non-tourism businesses have understanding & support	3.24
10	Emergency Preparation	Emergency funds for mitigating impacts of crises	3.25
11	Workforce	Adequate entry-level workforce in the travel sector	3.26
12	Funding Certainty	Stable and sustainable DMO revenue sources	3.27
13	Workforce	Effective training programs	3.28
14	Funding Certainty	Sufficient funds for attracting events	3.29
15	Resident Support	Community groups' perception of tourism industry	3.31



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# Thank you

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