

# DESTINATION NEXT

## Travel Juneau

Greg Oates, Chief Innovation Officer  
NEXTFactor Enterprises Inc.  
March 28, 2019



**NEXT**FACTOR 

# Today:

- 1> **Present DestinationNEXT and Key Industry Trends**
- 2> **Review Stakeholder and Public Survey Results for Juneau**
- 3> **Workshop to Consider Priorities for Next 1-3 Years**



# DESTINATION NEXT

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

2017 FUTURES STUDY UPDATE



## DestinationNEXT:

A data-driven platform that helps DMOs assess gaps and opportunities in their visitor economy to inform the development of actionable strategies for sustainable success.

# DESTINATION NEXT

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

2017 FUTURES STUDY UPDATE



## DestinationNEXT:

### Futures Study Survey

- > 75 trends and 55 strategies
- > 433 participants in 52 countries

### Diagnostic Assessment Tool

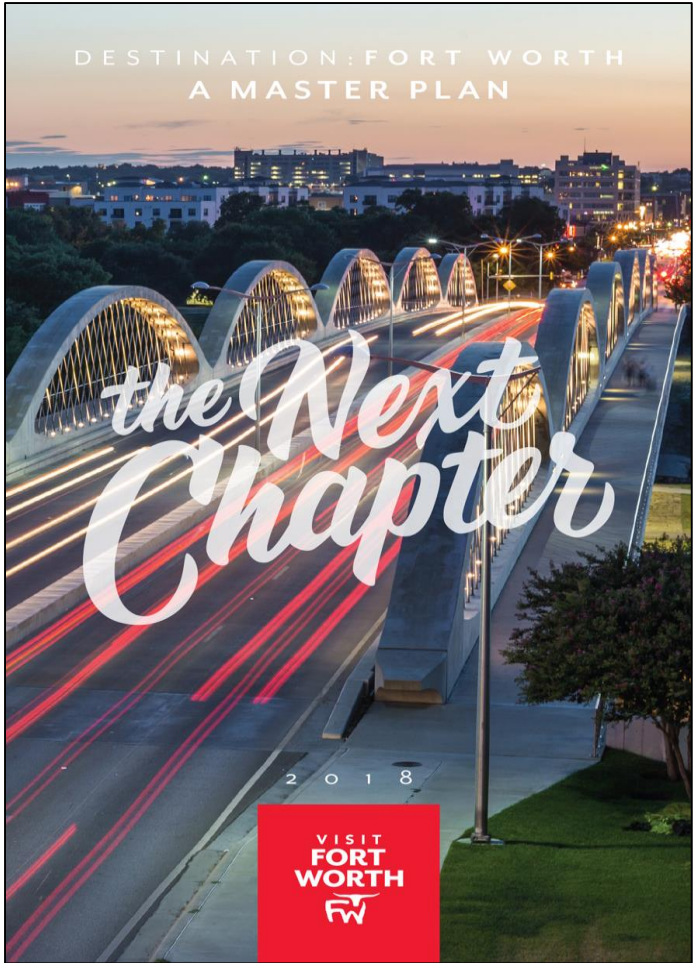
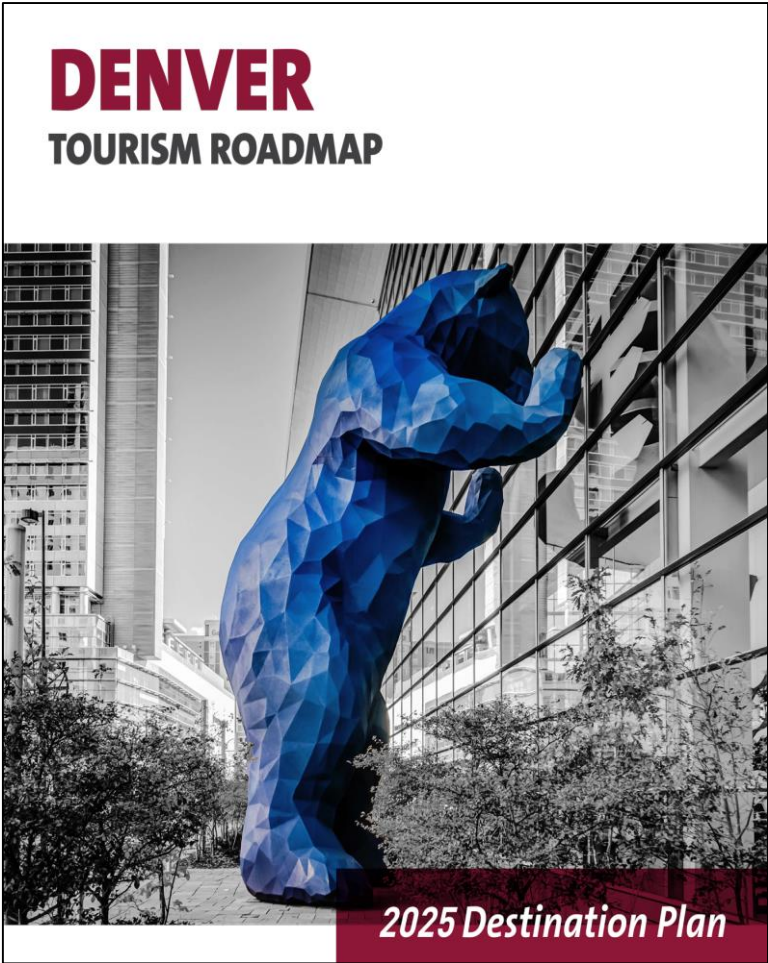
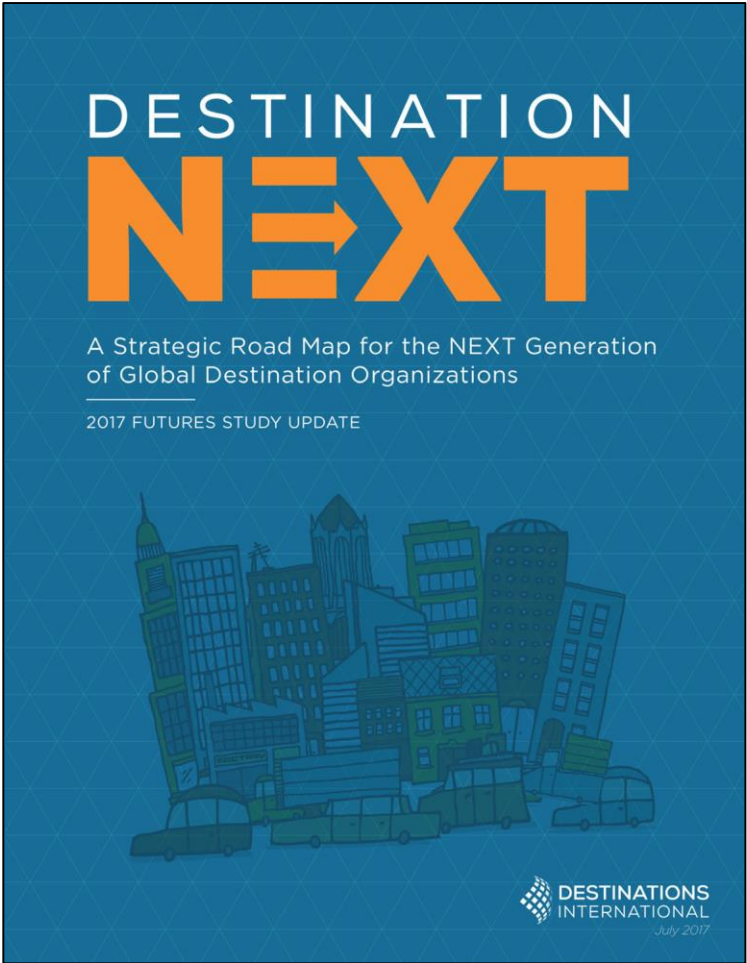
- > A proprietary scenario model
- > 190+ assessments in 11 countries



# The Destination Master Plan

Sustainable Tourism and Community Development

DESTINATION  
**NEXT**





# **DestinationNEXT** **Futures Study**





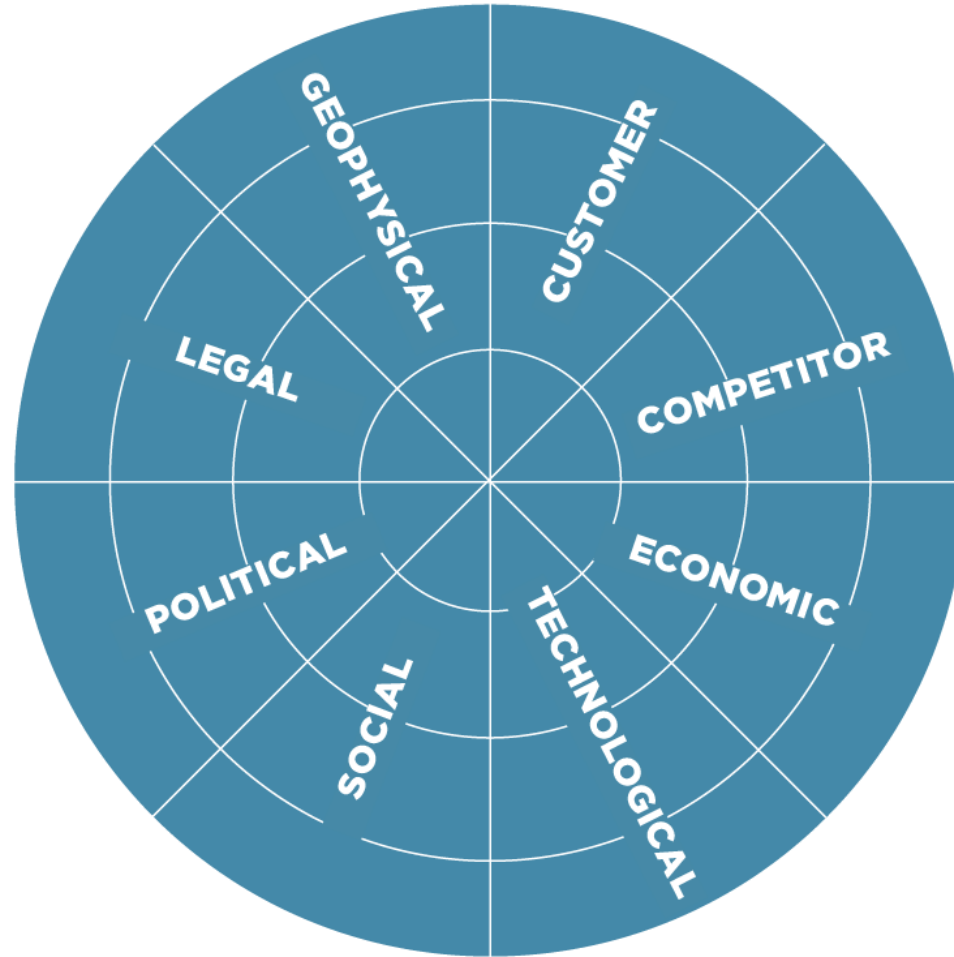
## DestinationNEXT Advisory Panels

Destination Leaders  
Industry Disruptors  
Community Leaders  
Clients & Operators



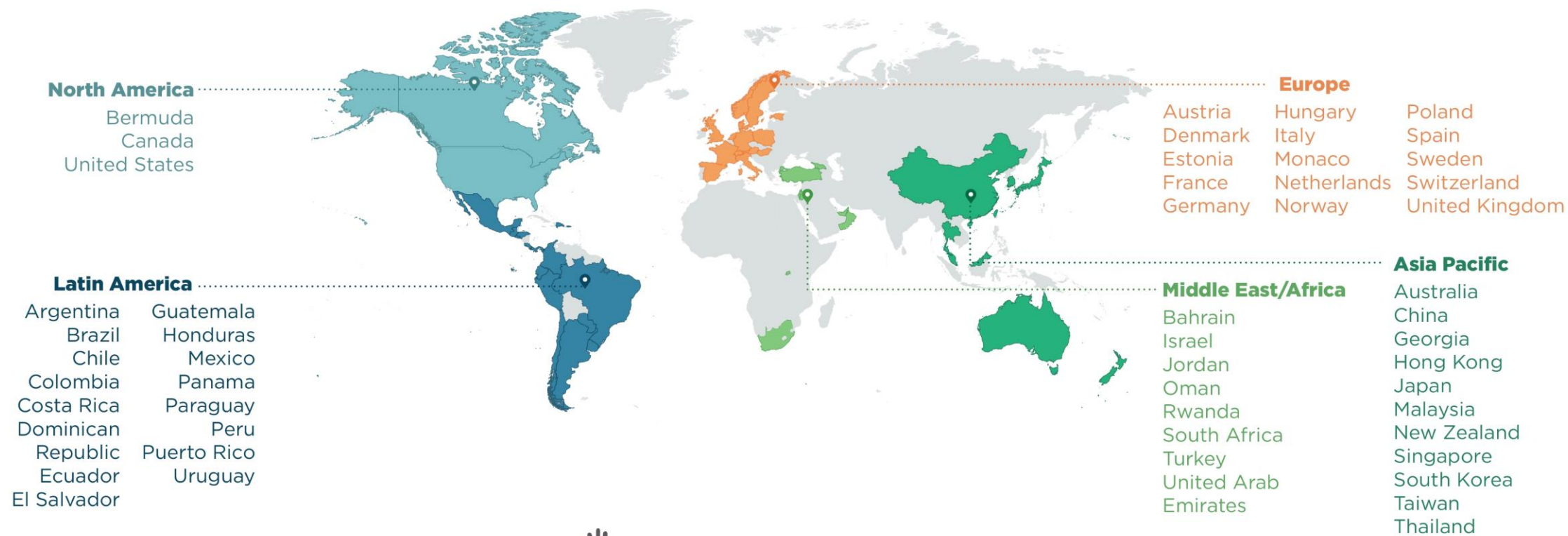
# Strategic Radar Map

**75**  
Trends



**55**  
Strategies

# Global Scope



 **433 participants**

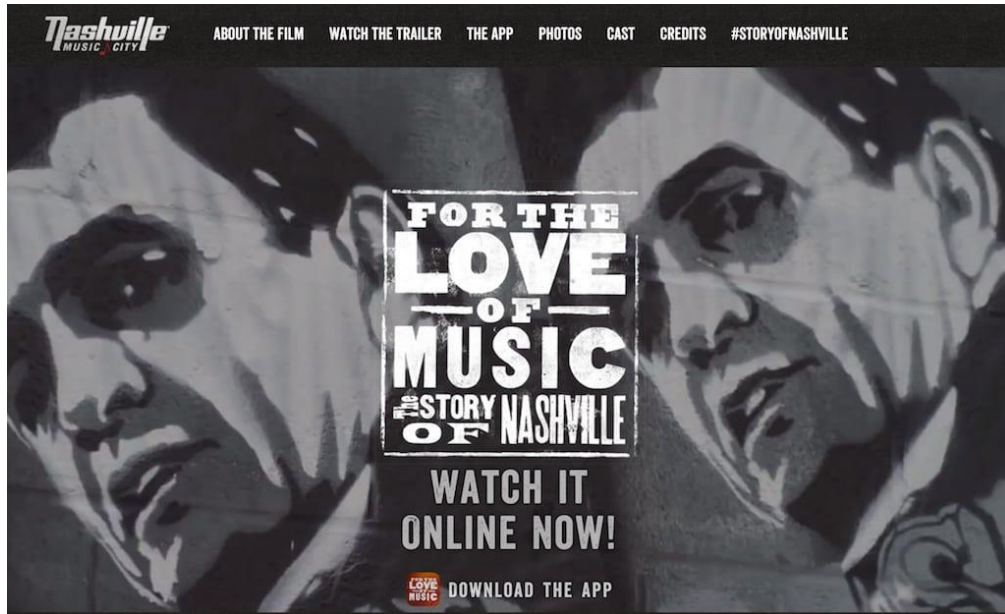
 **52 countries**

# Top 15 DestinationNEXT Trends 2017

1. Social media's prominence in reaching the travel market
2. Content creation and dissemination by the public across all platforms drives the destination brand and experience
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
5. Mobile platforms and apps becoming the primary engagement platform for travelers
6. Video becomes the new currency of destination marketing and story-telling
7. Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations
8. Smart technology creating new opportunities for innovative new services and processes
9. Technology enabling faster decision-making by customers
10. Geotargeting and localization becoming more prevalent
11. Organizations developing more strategic alliances in order to leverage resources
12. Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector
13. Customers increasingly expect highly curated and customized destination content from destination organizations
14. The brand of a destination becoming a more important factor in travel decisions to consumers
15. Customers increasingly looking to experience a local's way of life



# Re-engineering the DMO of the Future



## CURATORS

of Destination Programming and Content

## ADOPTORS

of Business Intelligence and Data Science

## CATALYSTS

of Economic Development

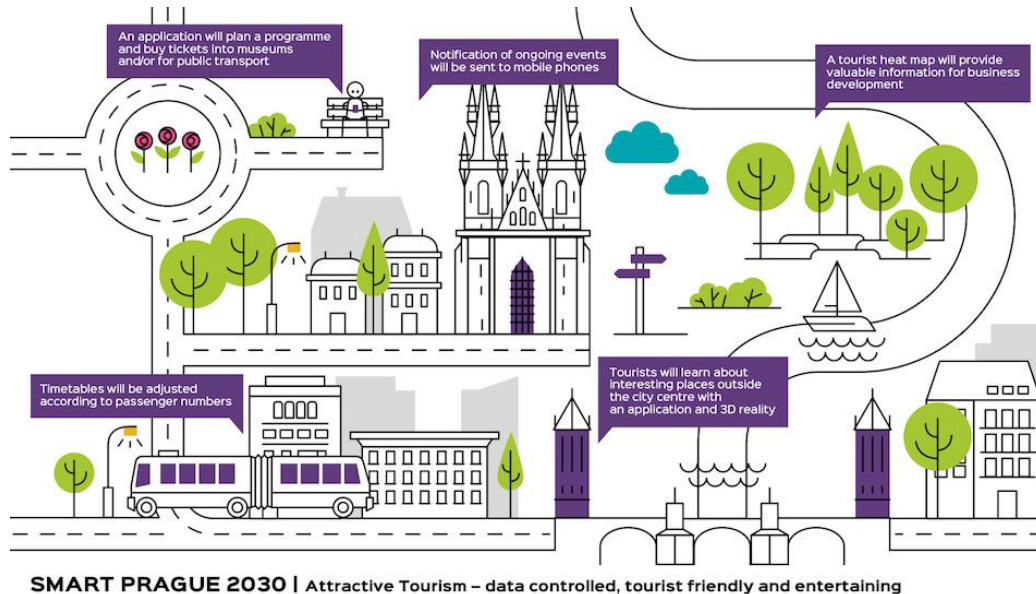
## ACTIVISTS

in Community Placemaking

## COLLABORATORS

within Strategic Networks

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# Transformational Opportunities:

- 1> Broadcast to Engagement**  
Leveraging the new marketplace
- 2> Brand Building**  
Managing the destination brand
- 3> Collaboration & Partnerships**  
Evolving the DMO business model





# DestinationNEXT

## Key Trends 2019





# SUSTAINABLE DEVELOPMENT GOALS



INCLUSIVE AND  
SUSTAINABLE  
ECONOMIC  
GROWTH



CULTURAL  
VALUES,  
DIVERSITY  
AND HERITAGE



SOCIAL  
INCLUSIVENESS,  
EMPLOYMENT  
AND POVERTY  
REDUCTION

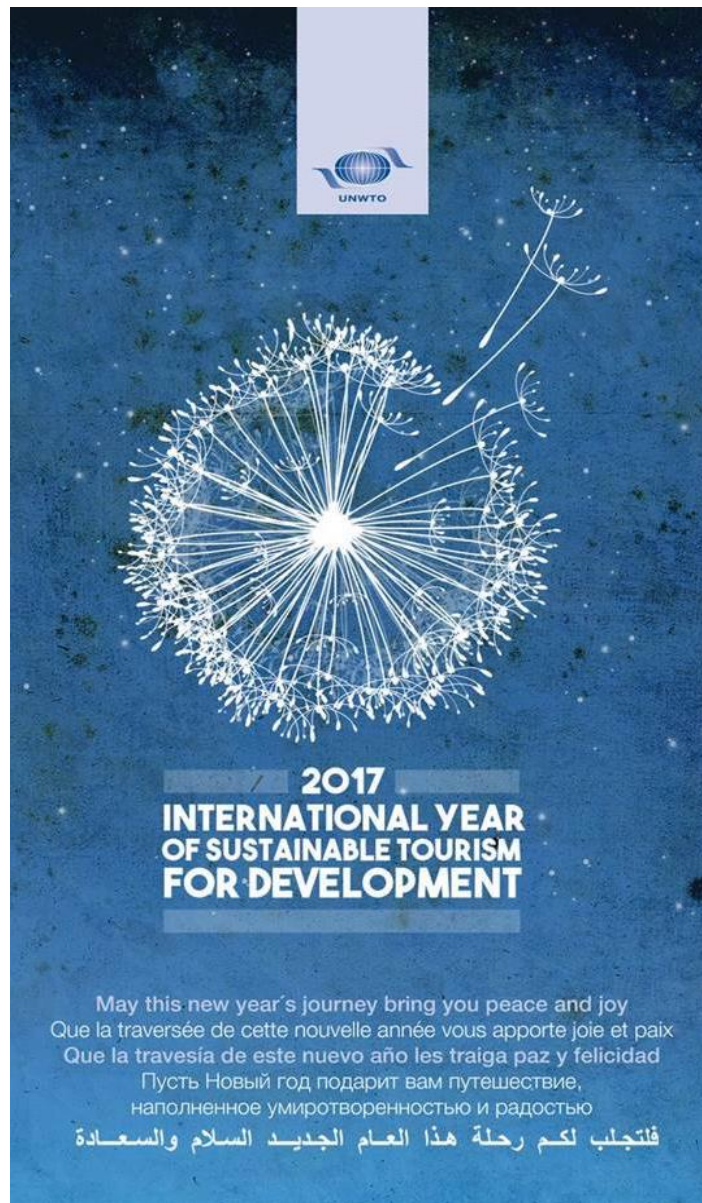


RESOURCE  
EFFICIENCY,  
ENVIRONMENTAL  
PROTECTION AND  
CLIMATE CHANGE



MUTUAL  
UNDERSTANDING,  
PEACE AND  
SECURITY









**TOURISM  
FOR SDGS**

a platform developed by



Tourism for SDGs



Learn



Share



Act

Let's make tourism a driver for realizing the SDGs!

SEARCH



How can you engage with the platform?

- Access a wide range of resources
- Upload your own initiatives, events and research
- Engage, discuss and collaborate with other users
- Share content related to tourism and sustainable development

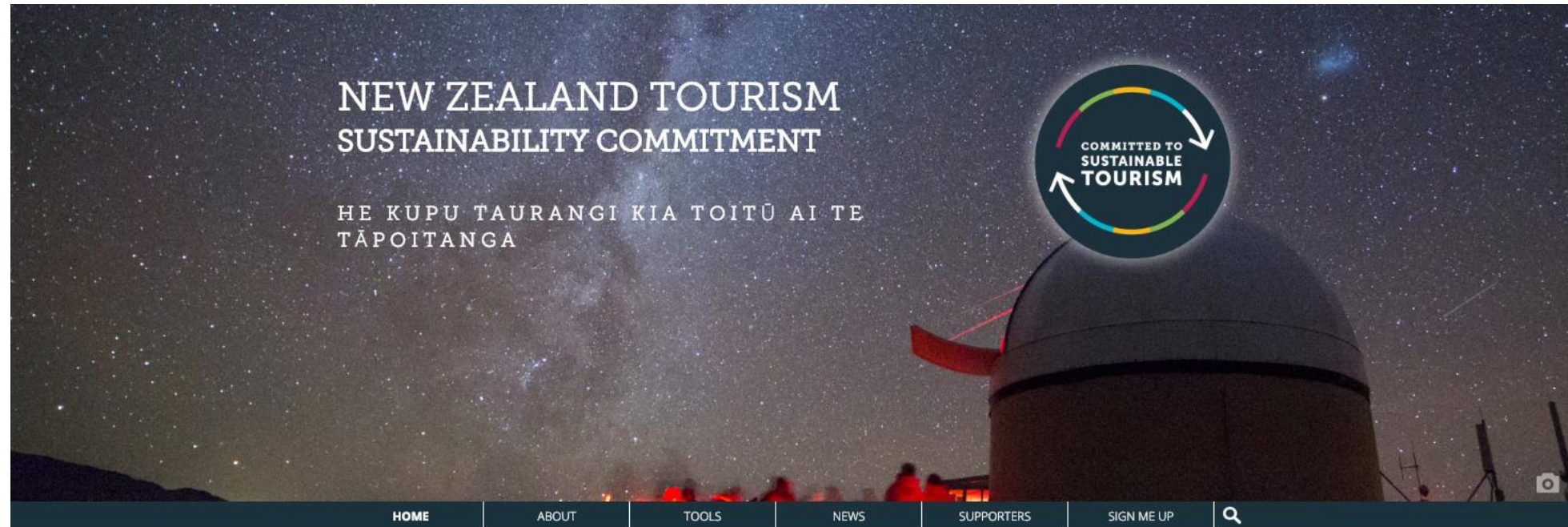


**SUSTAINABLE  
DEVELOPMENT  
GOALS**





# Sustainable Tourism Development



## LEADING THE WORLD IN SUSTAINABLE TOURISM

The New Zealand Tourism Sustainability Commitment aims to see every New Zealand tourism business committed to sustainability by 2025 - our Vision is Leading the World in Sustainable Tourism. To deliver on this, we must achieve ambitious economic goals while sharing the overwhelming benefits with supportive host communities, contributing to restoring, protecting and enhancing our natural environment, and continuing to be a high quality destination of choice for domestic and international travellers.

We are inviting every New Zealand tourism business to join us on this inspirational sustainability journey. Sign up now to the Tourism Sustainability Commitment and adopt 14 Commitments that will ensure we achieve our goals. Together we can create a truly sustainable tourism industry that makes a positive and enduring contribution to Aotearoa New Zealand.



# Sustainable Tourism Development

## THE TOURISM 2025 PLANNING FRAMEWORK

The Tourism 2025 planning framework is a tool for improving the competitiveness of the New Zealand tourism industry. The framework has been developed specifically for New Zealand tourism and provides a shared planning methodology and a common language. The framework themes have been identified both for their critical importance to an industry aspiring to ignite growth in value, but also for their proven durability. Using the Tourism 2025 framework will help us grow value individually and grow value together.

### THE FIVE THEMES OF THE TOURISM 2025 FRAMEWORK ARE:



#### PRODUCTIVITY

##### Productivity for profit

Our fastest route to growth will be to make more money from those investments we have already made and those resources we already employ. Improve our profitability and new investment will follow. The Tourism 2025 framework prompts us to continue our search for new solutions to seasonality and new stimuli for regional spread and to individually find ways to improve our capability.



#### VISITOR EXPERIENCE

##### Drive value through outstanding visitor experience

We recognise that tomorrow's visitors are unlikely to want more of the same: our changing visitor mix brings with it the challenge of changing expectations. The Tourism 2025 framework prompts us to listen carefully to our visitors, constantly hone our understanding of visitor needs and continuously improve our visitors' experience.



#### CONNECTIVITY

##### Grow sustainable air connectivity

New Zealand is an island – 99% of international visitors arrive by air – and so connectivity is crucial. As we grow value together, the Tourism 2025 framework prompts us to strengthen the relationships, partnerships and collaborations that sustain, expand and extend our visitor pipelines.

#### INSIGHT

##### Prioritise insight to drive and track progress

Mark Twain famously said, "It ain't what you don't know that gets you into trouble. It's what you know for sure that just ain't so." The Tourism 2025 framework prompts us to collect and share relevant data and turn it into meaningful information so that we are more responsive to a fast-changing world.

#### TARGET

##### Target for value

The story of the past ten years in tourism has been growth in visitor numbers but declining revenue in real terms. As our visitor mix continues to evolve, the Tourism 2025 framework prompts us to identify and pursue the opportunities that will deliver the greatest economic benefit.

“The story of the past 10 years in tourism has been growth in visitor numbers but declining revenue in real terms.”

— Tourism Industry Aotearoa

# Sustainable Tourism Development

## Mood of the Nation

New Zealanders' perceptions of international visitors

November 2018



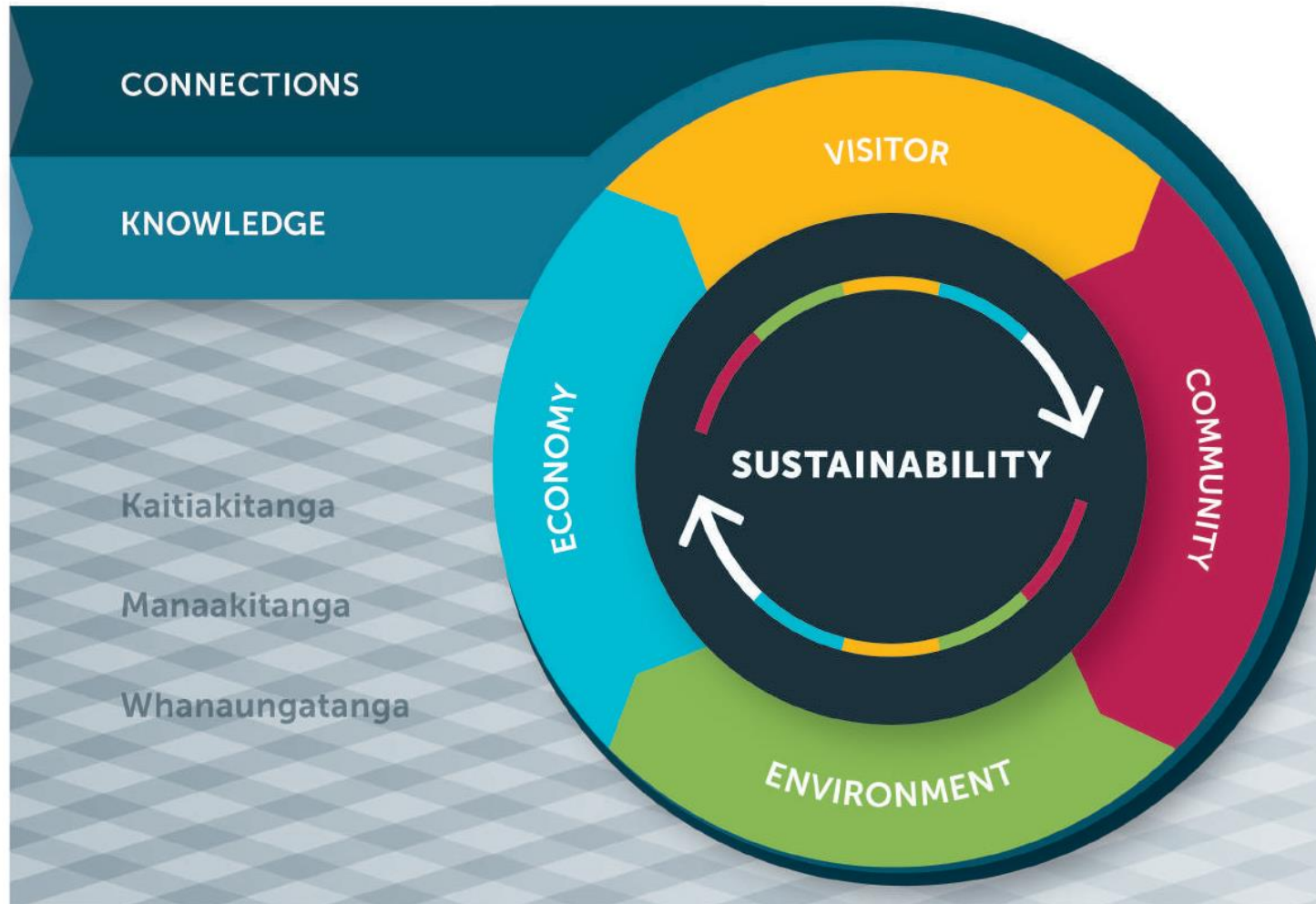
“70% of New Zealanders know that tourism is one the top three revenue earners for the country, however only 10% know that it’s number one.”

— Tourism Industry Aotearoa



# TOURISM 2025 & BEYOND

## A SUSTAINABLE GROWTH FRAMEWORK



“Our expectation is that sustainability will become a core value against which all decisions are tested.”

— Tourism Industry Aotearoa



## Tourism New Zealand Vision:

**“Growing a sustainable tourism industry  
that benefits New Zealanders”**



## **New Breckenridge Tourism Vision:**

**“A Sustainable Harmony of Quality of Life for Residents  
and Quality of Place for Visitors”**



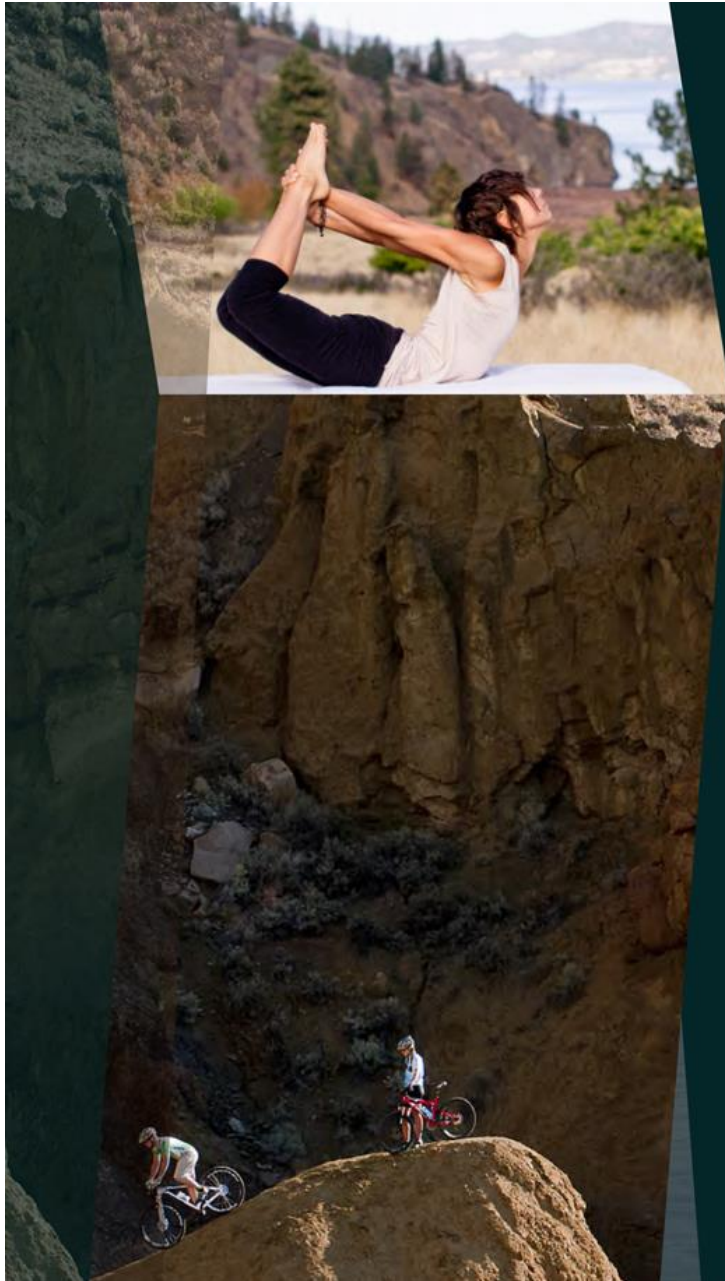
# 4 Strategic Goals

- 1 Deliver a more balanced, year-round economy driven by destination tourism
- 2 Fiercely protect Breckenridge's authentic character and community feel
- 3 Establish Breckenridge at the leading edge in mountain environmental stewardship
- 4 More boots and bikes, less cars

# Visitor Dispersal Strategy







# EMBRACING OUR POTENTIAL

HOW DO WE CREATE  
AN EXCEPTIONAL VISITOR EXPERIENCE?

*...a partnership approach*

A ten-year tourism strategy for the  
Thompson Okanagan Region

2012 - 2022



## 15 UNWTO AWARDS

### Call for Applications

The UNWTO Awards are now open for applications in the following categories:

- UNWTO Award in Public Policy and Governance
- UNWTO Award in Enterprises
- UNWTO Award in Non-Governmental Organizations

**Deadline 31 October 2018**  
**(23:59 Central European Time)**

Online application form:  
<http://know.unwto.org/online-application/unwto-awards>  
**Contact:** [awards@unwto.org](mailto:awards@unwto.org)

## Integrating with other plans and strategies

*Embracing Our Potential* has sought to reflect international best practices in destination planning, and to integrate with national and provincial tourism strategies and initiatives in a way that will provide leverage for businesses within the region while adding value to these existing policies. Similarly, the strategy has endeavoured to be consistent with local tourism plans, while in turn creating a context for future community planning processes.

### INTEGRATING WITH OTHER PLANS AND STRATEGIES

INTERNATIONAL	Analysis of a wide range of international destinations – Australia, New Zealand, Ireland, N. Ireland, Scotland, England, Wales, United States, other Canadian provinces	<b>UNWTO</b> <i>A Practical Guide to Tourism Destination Management</i>
NATIONAL & PROVINCIAL	<b>Government of British Columbia / Tourism BC</b> <i>Gaining the Edge: A Five-year Strategy for Tourism in British Columbia 2012-2018</i> Brand: Super, Natural British Columbia	<b>Government of Canada</b> <i>Canada's Federal Tourism Strategy: Welcoming the World</i> , October 2011 <b>Canadian Tourism Commission</b> <i>2011 – 2015 Corporate Plan Summary</i> Brand: Canada. Keep Exploring
SECTORS, ASSOCIATIONS & REGIONAL	<b>Sector Associations &amp; Sector Strategies</b> <i>AtBC: The Next Phase: 2012-2017 – A Five-year Strategy for Aboriginal Cultural Tourism in British Columbia</i> Building on the 2005 <i>Aboriginal Cultural Tourism Blueprint Strategy</i> BC Wine Institute BC Experiences Sector Plans	<b>Thompson Okanagan Ten-Year Regional Tourism Strategy</b>  <b>Regional Initiatives</b> <i>COTA 2009 Tourism Sector Strategy: for the Southern Interior Region in Response to Mountain Pine Beetle</i> Okanagan Partnership; and Integrated Land Management Bureau regional plans
COMMUNITY	<b>Land Use Planning</b> Official Community Plans	<b>Strategic Sectors</b> Arts & culture plans Economic development strategies Agricultural area plans Trails strategies Mountain biking Sport / adventure tourism  <b>Tourism Plans</b> Community Tourism Foundations plans Community marketing plans



# In-Destination Mobile Commerce

Guests using the  
“Rose” chatbot at  
The Cosmopolitan  
Las Vegas spend  
30+ percent more  
on-property.

MEET  
ROSE

TEXT ROSE

702.930.8188

# In-Destination Mobile Commerce

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## San Francisco | The Official Guide

688K people like this including Leonard Hoops and 12 friends  
City



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

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San Francisco, CA

from **\$45**

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TripAdvisor Traveler Rating

5.0 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

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Digital, Booking Sites

# TripAdvisor Saw Experiences and Restaurants as Major Growth Contributors in 2018

Dennis Schaal, Skift - Feb 12, 2019 5:52 pm



Experiences, restaurants and alternative accommodations accounted for 27% of TripAdvisor's \$1.61 billion in total revenue in 2018 — **up from 23% of revenue in 2017.**

Where to?



Hotels



Things to do



Restaurants



Flights



Vacation Rentals



Cruises



More



**gregoates**  
@gmoates

Contributions  
0

Followers  
1

Share your travel advice

Post photos

Write review



**Eater** created a Trip  
Feb 22



The Ten Essential Paris Bakeries

### Who to follow on TripAdvisor



**Thrillist**   
@Thrillist

143 contributions • 75,980 followers

Thrillist means fun. We're eaters, drinkers, travelers, and doers. Life is for living, and that's wh...

Follow



**Well+Good**   
@iamwellandgood

📍 New York City, New York  
35 contributions • 1,381 followers

We obsessively cover the wellness scene — fitness, superfoods, natural beauty, and more —from coast to...





Hi Greg

See the top activities that our travelers are booking ahead

Learn more about the attractions you found:



Johnson GEO CENTRE  
 700 reviews  
 1 booking option

### Book ahead



**More**

[See all](#)

1,646 reviews



699 reviews



62 reviews



Daily inspiration. Expert advice. Great trips start at SmarterTravel. Part of the TripAdvisor Media...

 Follow





## St. John's Walking Food Tour

By: So-Full Food Tours

 17 reviews

 Save |  Share

**Check Availability**

From **\$68.95**

Low Price Guarantee 

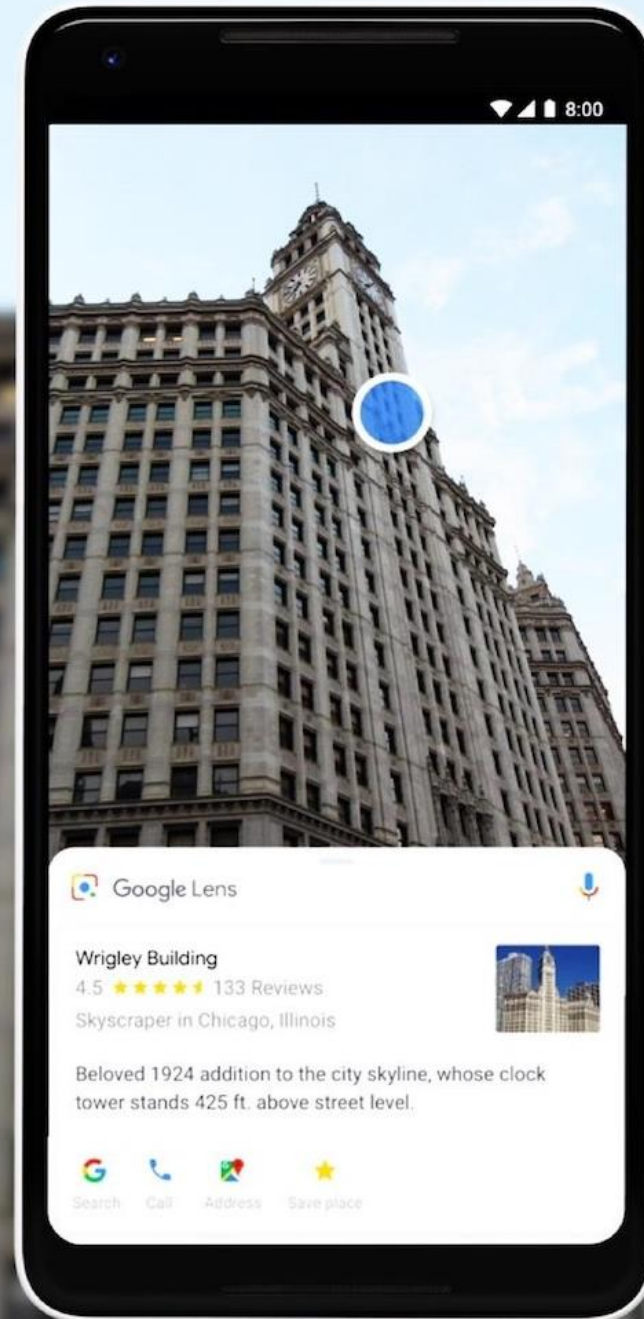
 Free Cancellation up to 24 hours in advance

### Highlights

- Visit five restaurants along Duckworth and Water streets in St. John's
- Your guide will regale you with stories even the locals don't know
- Spend the fun afternoon with a small group who is there for fun

Read more ▼

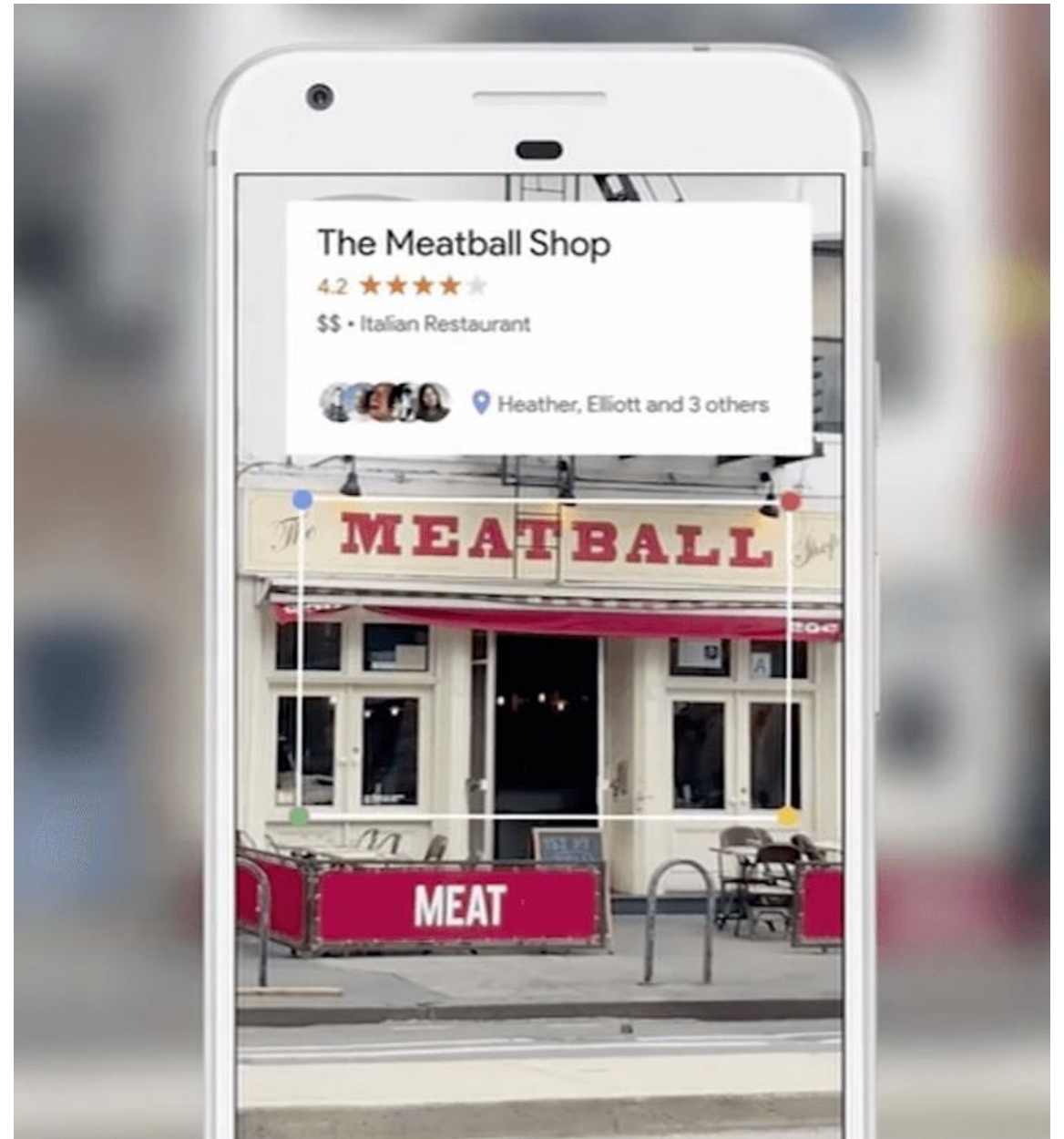
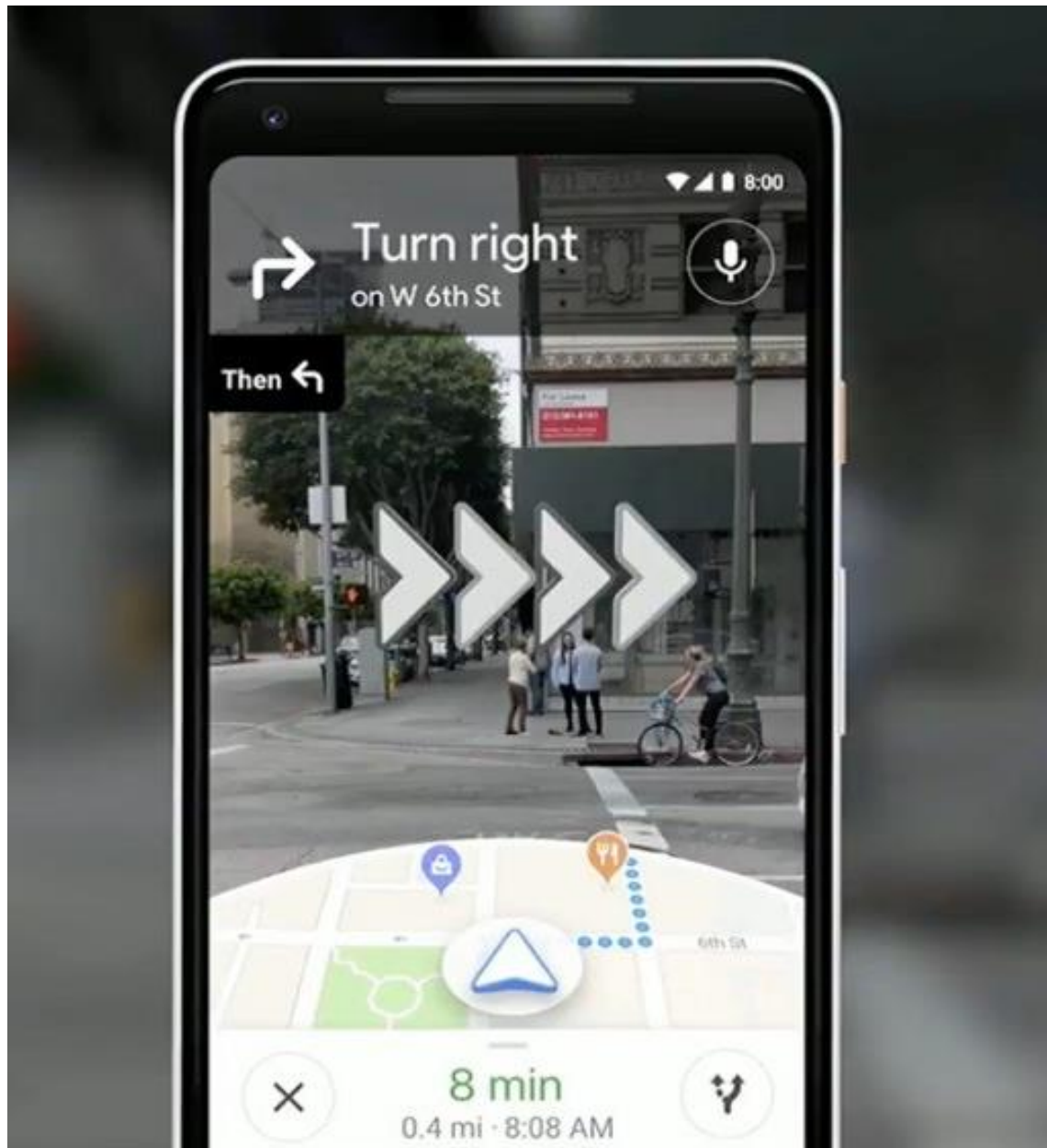
# Mixed Realities



“Google’s vision of the future still involves searching for things. Now it's just by whipping out your phone and pointing the camera at something.”

— Wired







A stylized, cartoonish illustration of a city skyline. It features several buildings of different heights and shapes, some with windows. In the foreground, there are several vehicles, including cars and a bus. The entire illustration is rendered in a dark blue color against a lighter blue background with a diamond pattern.

# **DestinationNEXT** **Scenario Model**

# Scenario Model



# Destination Strength Variables



**Destination  
Performance**



**Brand**



**Accommodation**



**Attractions and  
Entertainment**



**Conventions & Meeting  
Facilities**



**Air Access**



**Events**



**Sporting and  
Recreation Facilities**



**Communication &  
Internet Infrastructure**



**Mobility and Access**



# Community Support & Engagement Variables



**Effective DMO  
Governance Model**



**Membership Strength  
& Support**



**Industry Support**



**Local Community  
Support**



**Policy and  
Regulatory Environment**



**Workforce**



**Hospitality Culture**



**Regional Cooperation**



**Funding Support &  
Certainty**



**Economic Development**

# Destination Assessments



**350**

destinations from 18  
countries



**190**

detailed  
assessments  
completed in 11  
countries

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USA, Canada,  
Mexico, Switzerland, Colombia,  
Korea, Guatemala, Taiwan,  
Denmark, Brazil,  
Australia



**45**

underway or  
planned,  
including 4 other  
countries

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Dominican Republic, El  
Salvador, Ecuador,  
South Africa



**50**

in discussion,  
including  
14 other countries

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Peru, Argentina, Dubai, Germany,  
Honduras, Chile, New Zealand,  
United Kingdom, Thailand,  
Micronesia, Philippines, Russia,  
Ghana, Nigeria

# United States

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\* States shaded for state-wide assessment



# Canada



\* Provinces shaded for province-wide assessment

# Regional Assessments

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**Maine**  
VisitMaine.com



PURE *M*ICHIGAN®

**Manitoba**  
CANADA'S HEART  BEATS

*HAWAII* TOURISM  
AUTHORITY

**VISITFLORIDA®**

  
**New Jersey**

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# Destination Strength Performance

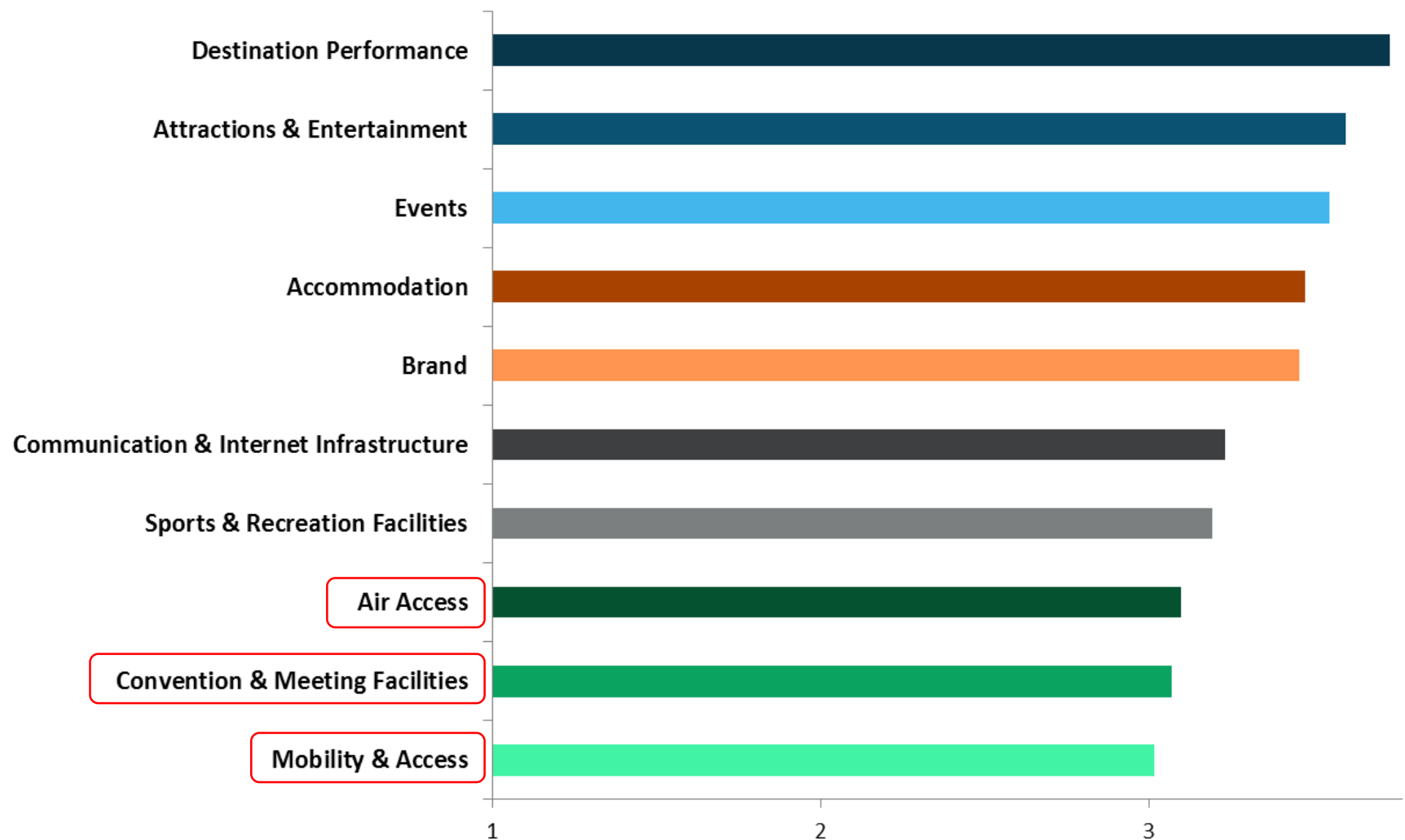
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# Destination Strength Performance



# Mobility & Access

- Autonomous vehicles
- Multi-modal options
- Road infrastructure
- Public transportation
- Walkability



# Convention & Meeting Facilities

- Demand for convention and meeting space to compete long term
- Unique offsite venues for special events





# Air Access

- Coalition building and research development to secure more international and domestic flights and capacity





# Community Engagement Performance

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# Community Engagement Performance





# Workforce Housing & Development

- Workforce attraction and retention
- Affordable housing
- Transportation
- Labor relations



# Funding Support & Certainty

- Sufficient revenue sources
- Stable revenue sources





# Local Community Support

- Support from local residents and media
- Increase in internal advocacy initiatives
- Need for more resident sentiment tracking





# DESTINATION NEXT

**Greg Oates**

greg.oates@nextfactorinc.com

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nextfactorinc.com



**Thank You**

