

The background of the slide features a night-time aerial view of a city, likely Vancouver, with its lights reflecting on the water. Overlaid on this image is a complex network of glowing blue lines and dots, resembling a digital or data network. A solid orange vertical bar is positioned to the right of the title text.

A Strategic Road Map for the NEXT Generation of Destination Organizations



DESTINATION
NEXT



DESTINATIONS
INTERNATIONAL



NextFactor



CLIENT STATES

Alabama	Louisiana	Nebraska	Pennsylvania
Arizona	Maine	New Jersey	South Carolina
California	Massachusetts	New Mexico	South Dakota
Florida	Michigan	New York	Tennessee
Georgia	Minnesota	North Carolina	Texas
Iowa	Mississippi	North Dakota	Virginia
Illinois	Missouri	Ohio	Washington
Kansas	Montana	Oklahoma	West Virginia
Kentucky		Wyoming	



1

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.

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



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

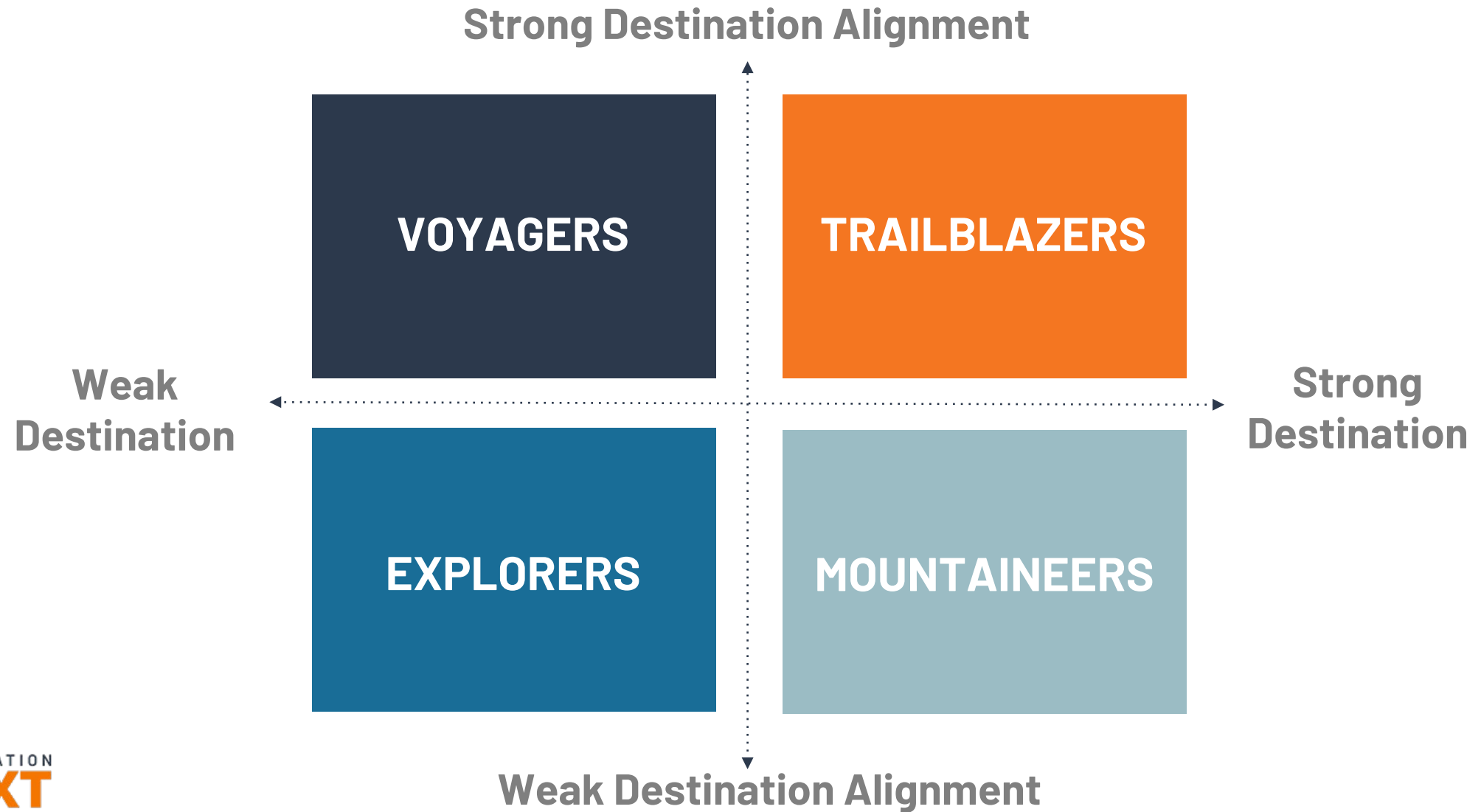
375 destination assessments in 12 countries

Stakeholders

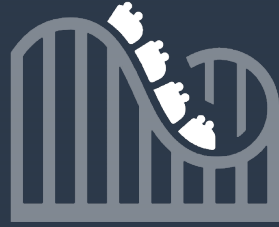


Scenario Model

Scenario Model



Destination Strength Variables



**Attractions &
Experiences**



**Arts, Culture &
Heritage**



**Dining, Shopping &
Entertainment**



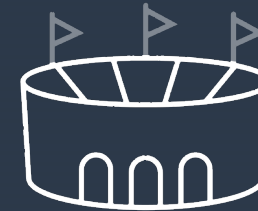
**Outdoor
Recreation**



**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**

2023 Futures Study

Global Advisory Group



USA

Chris Thompson
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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 Indy
 Greater Boston CVB
 Vacaville
 Visit Ogden
 Asheville CVB



Europe, Middle East, Africa

Bettina Reventlow-Mourie

Caroline Strand
Corne Koch
Jos Vranken
Matthias Schultz
Miha Kovačič
Nelly Mukazayire
Noa Sapir
Paul Kelly
Paul Mockler
Peter de Wilde

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

Ljubljana, Slovenia
 VisitScotland
 Convention Bureaux of Ireland
 London & Partners
 Visit Oulu
 Visit West (Bristol & Bath, UK)
 Visit Britain / Visit England



South/Central America & Caribbean

Jacqueline Mora
Alejandra Zuñiga
David Hidalgo
Fernando Fondevilla
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 several business professionals in a meeting, gathered around a table with laptops and documents, overlaid with a blue tint.

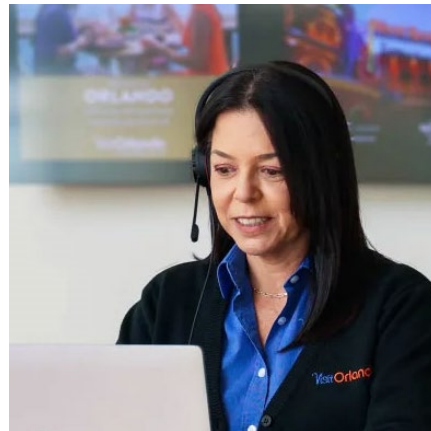
Customers

A photograph of a restaurant interior with several wine glasses on a table, 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

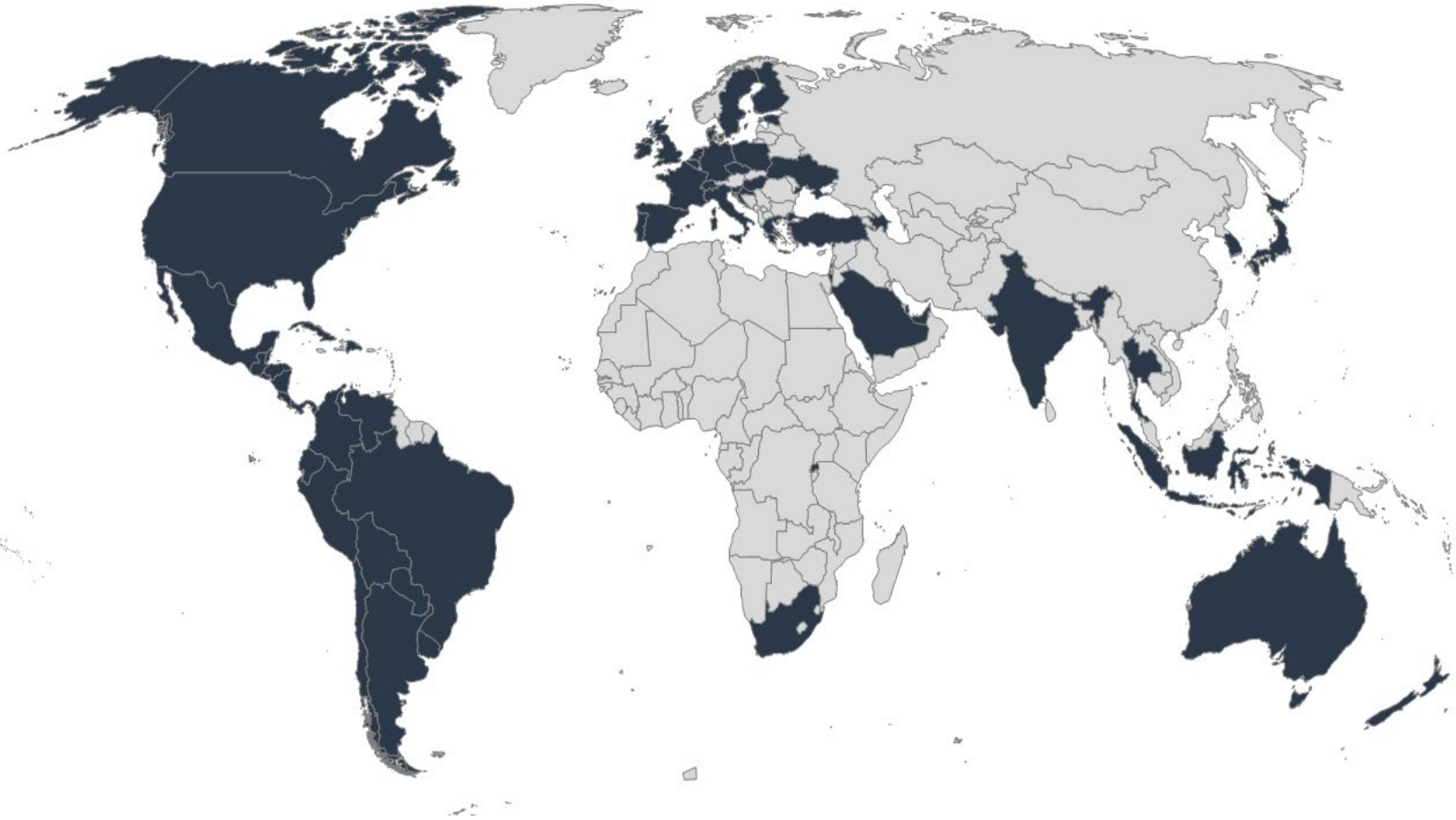


50
TRENDS



50
STRATEGIES

2023 Survey



**Survey
Participants**

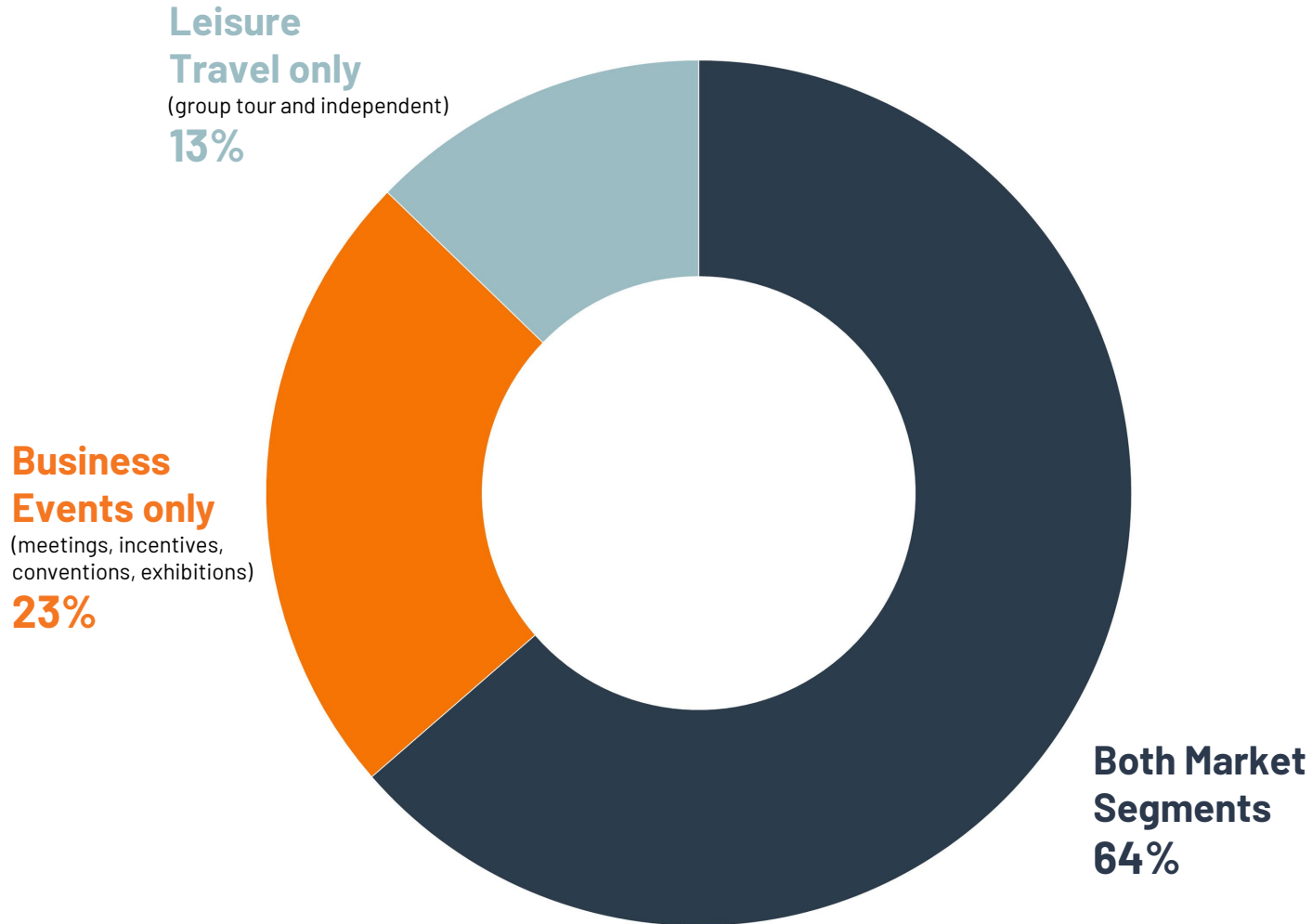
837

PARTICIPANTS

62

COUNTRIES

Market Segment



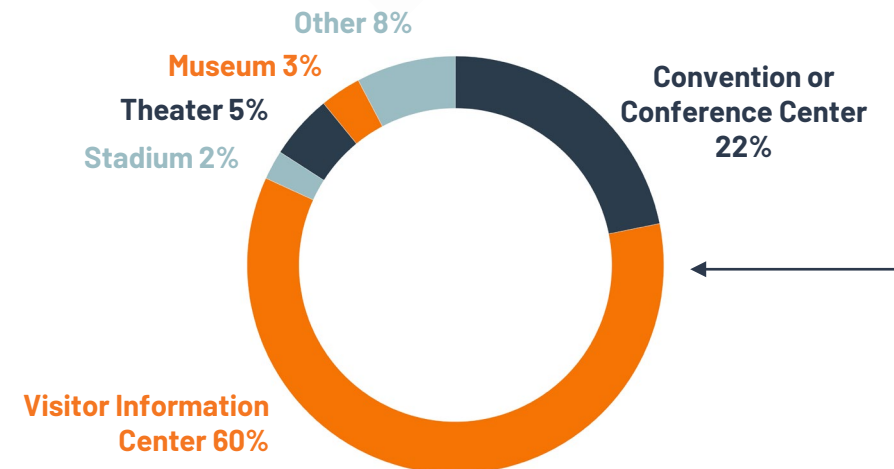
Facility Management

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

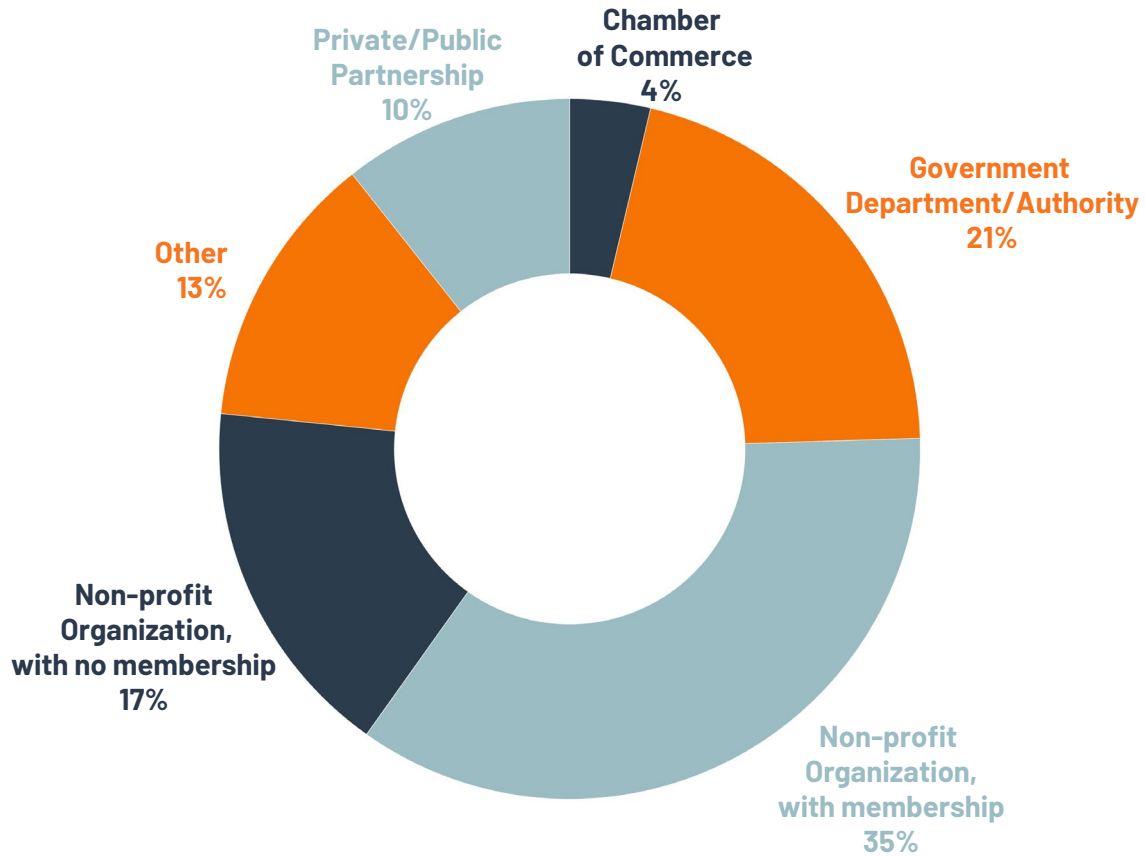
No
73%



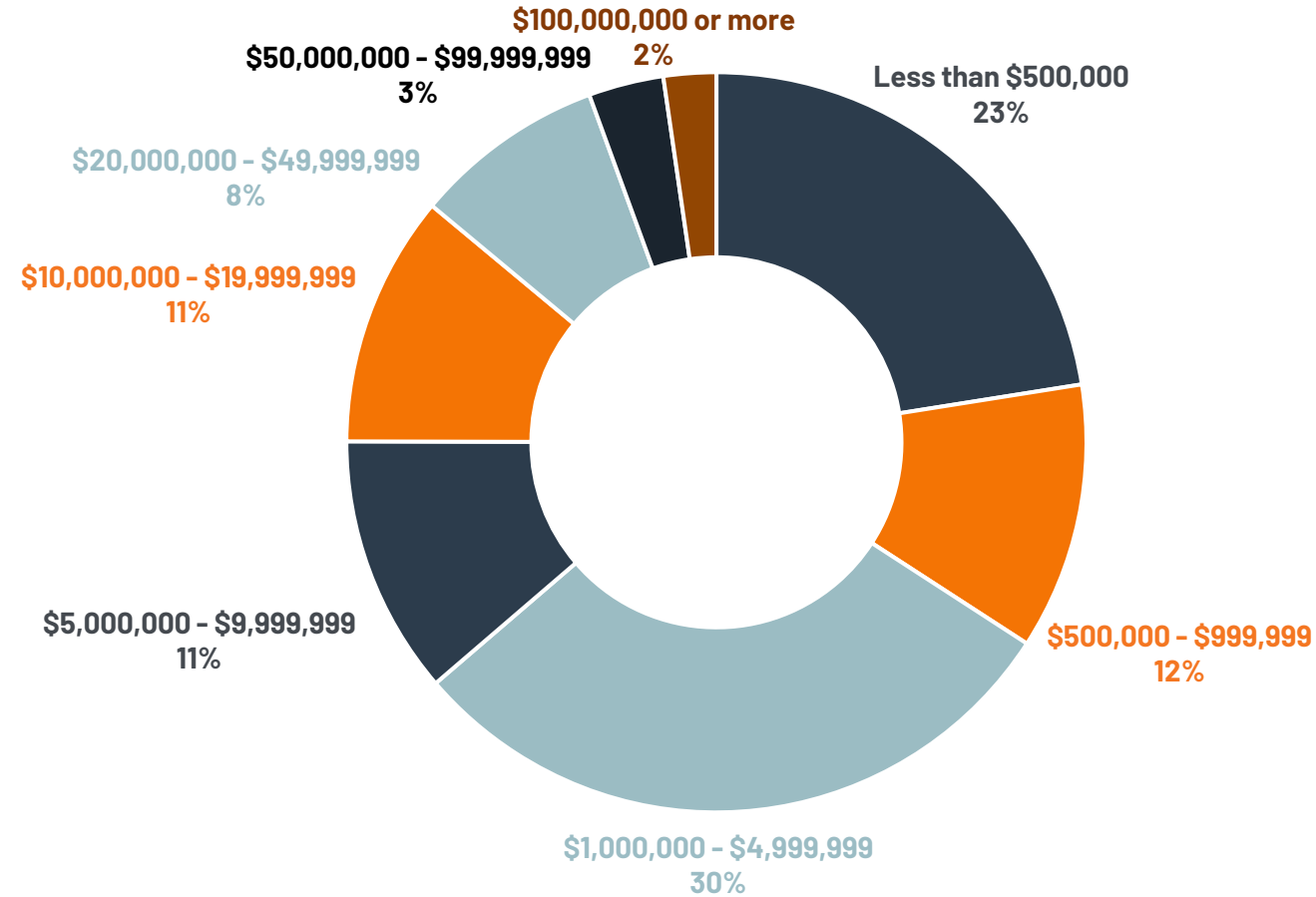
Yes
27%



Business Model



Budget



Top Trends



- 1 1 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 +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
- 13 +6 **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



Top Strategies



- 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**
- 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

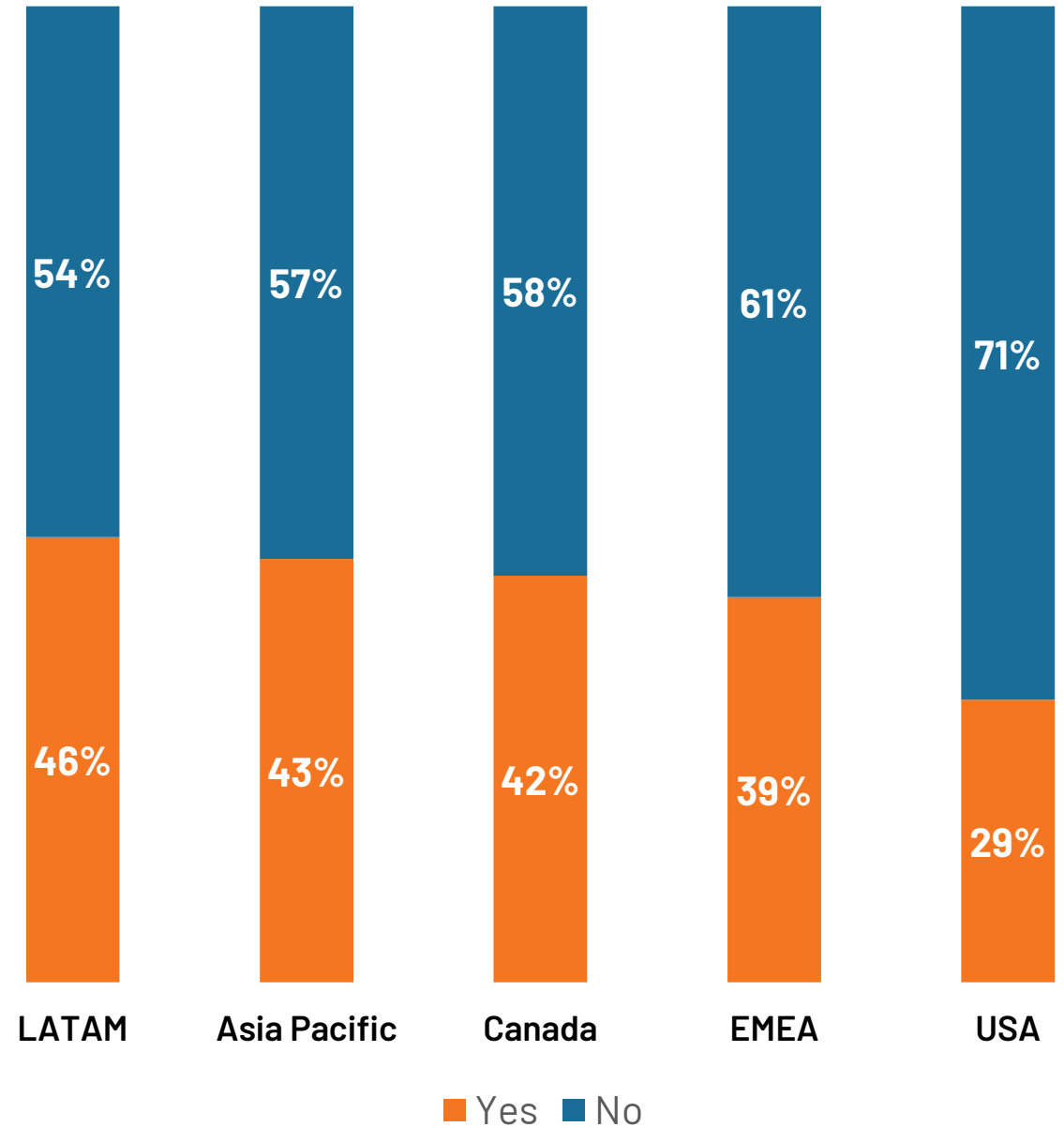
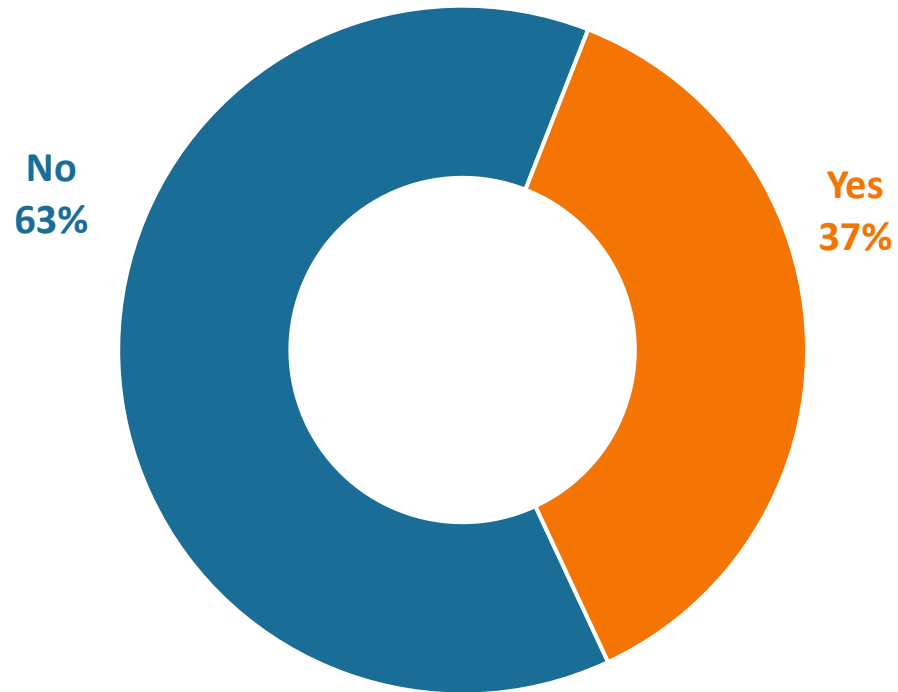
12

Increase efforts to attract & retain our organization's talent

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



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



- 2 Focus on developing authentic experiences for the customer
- 5 Have a greater role in destination & 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 & support new events in the destination

4

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

7

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
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
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

2 Transformational Opportunities



**Community
Leadership**



**Technology
Adoption**

Mandate Map



DMO Mandate

DEMAND



Visitor
Engagement



Partner
Support



Community
Alignment



Destination
Development

SUPPLY

DMO Mandate

DEMAND



Visitor
Engagement

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



DMO Mandate

DEMAND

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



Partner
Support



Why Hawai'i? ▾

Corporate Social
Responsibility

Convention Center ▲

Why Choose Hawai'i
Convention Center?

About HCC ▾

Sales Staff

Venue Information ▾

Testimonials

Planner Resources ▲

Outreach Programs

Find a Nearby
Representative

Meeting Planners
Guide

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

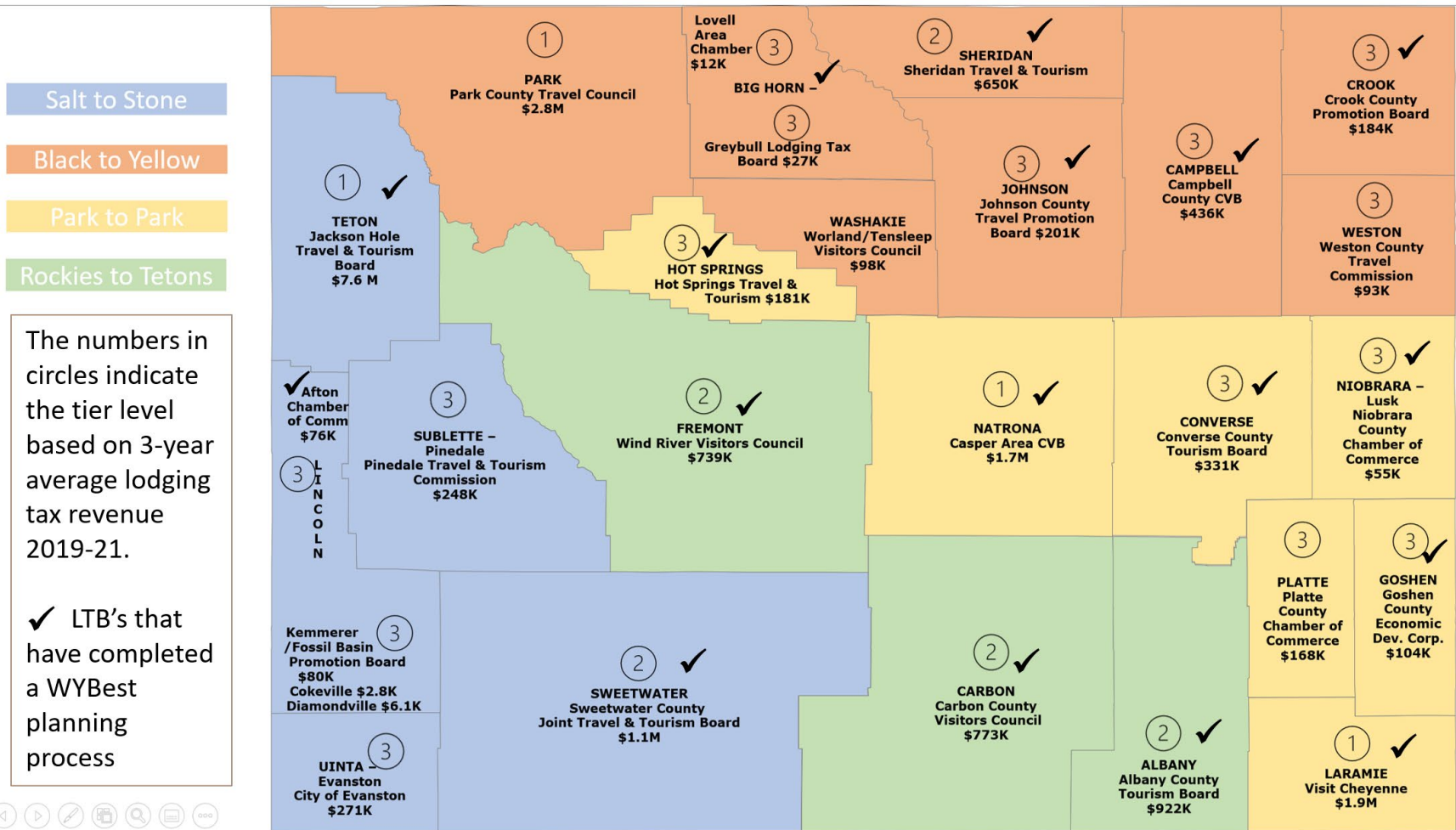
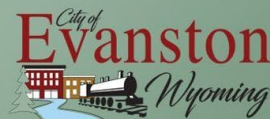


Destination Development

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

SUPPLY

Wyoming Lodging Tax Boards Annual Budget



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



A group of people, mostly women, are shown from the chest up, wearing bright yellow rain ponchos. They are all smiling and laughing, with their eyes closed or looking towards the camera. Water is spraying all over them, creating a misty, joyful atmosphere. In the background, a blue arrow points upwards. In the top left corner of the image, there is a circular seal that reads "DESTINATION MARKETING ACCREDITED ORGANIZATION ACCREDITATION PROGRAM".

Strategic Plan 2028
Plan Developed January – September 2023

 **NIAGARA FALLS** USA
WHERE ADVENTURE COMES NATURALLY™



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

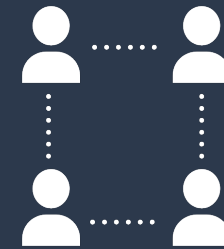
We are a private non-profit with a mission to expand the economic prosperity of the Niagara County communities by generating individual and group visitation.

Strategic Initiatives



DMO Mandate

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



Community
Alignment

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





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



Being a shared value in our destination means we are a community asset 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.



PASSION

Destination Passion is an intense enthusiasm for our destination, our community and its people.



AWARENESS

Destination Awareness is a concern about and well-informed 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.



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

TRANSPARENCY



Destination Transparency is all about being proactively open to stakeholder and public scrutiny.

COLLABORATION



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


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.

RELEVANCE

Destination Relevance comes from being close connected and involved in what is being done or considered in our destination.

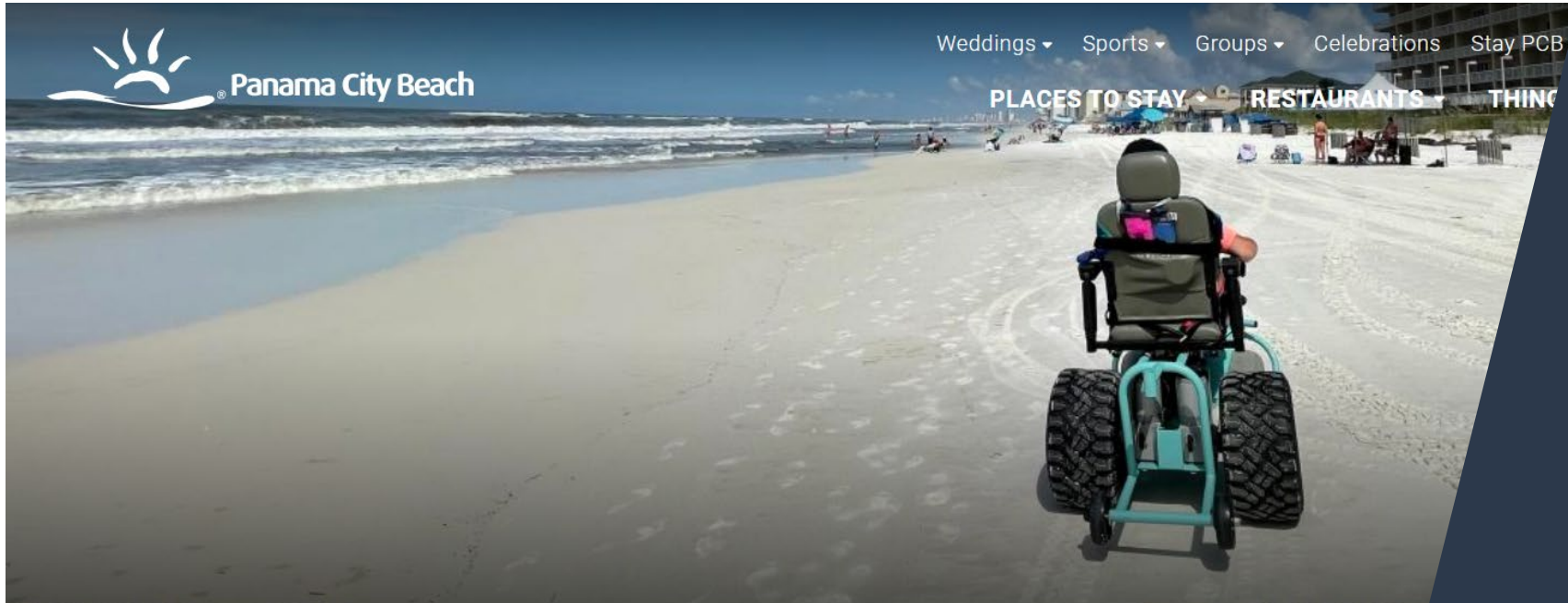




Local Food = Sustainability

Union County CVB, OH

FUN FOR ALL



Panama City Beach

Weddings ▾ Sports ▾ Groups ▾ Celebrations ▾ Stay PCB

PLACES TO STAY ▾ RESTAURANTS ▾ THINGS TO DO

ACCESS TO THOSE WITH DISABILITIES

[« 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. With 100 access points — and **100 access points** — there's fun for all ages and abilities. Travel blogger Cory L

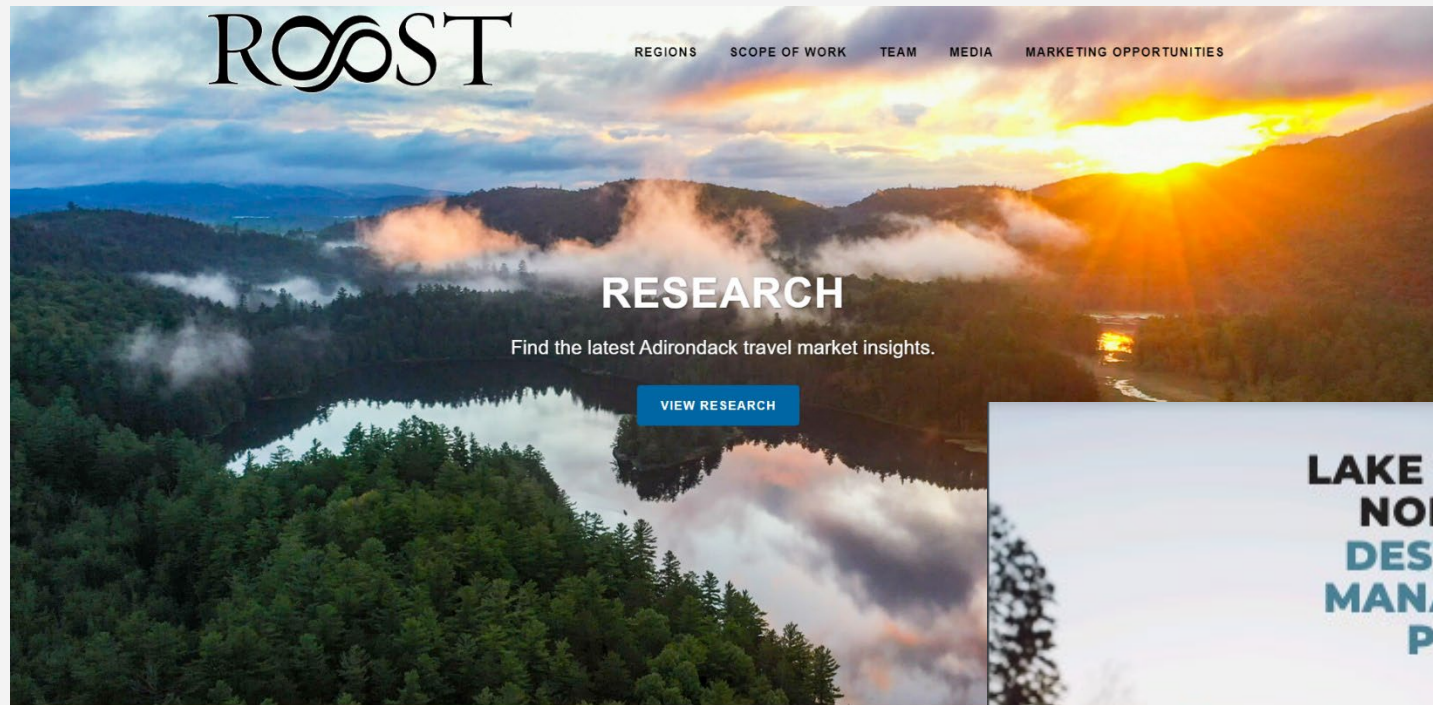


Workforce

Our crisis to solve

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

Workforce



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



DLO of the Future



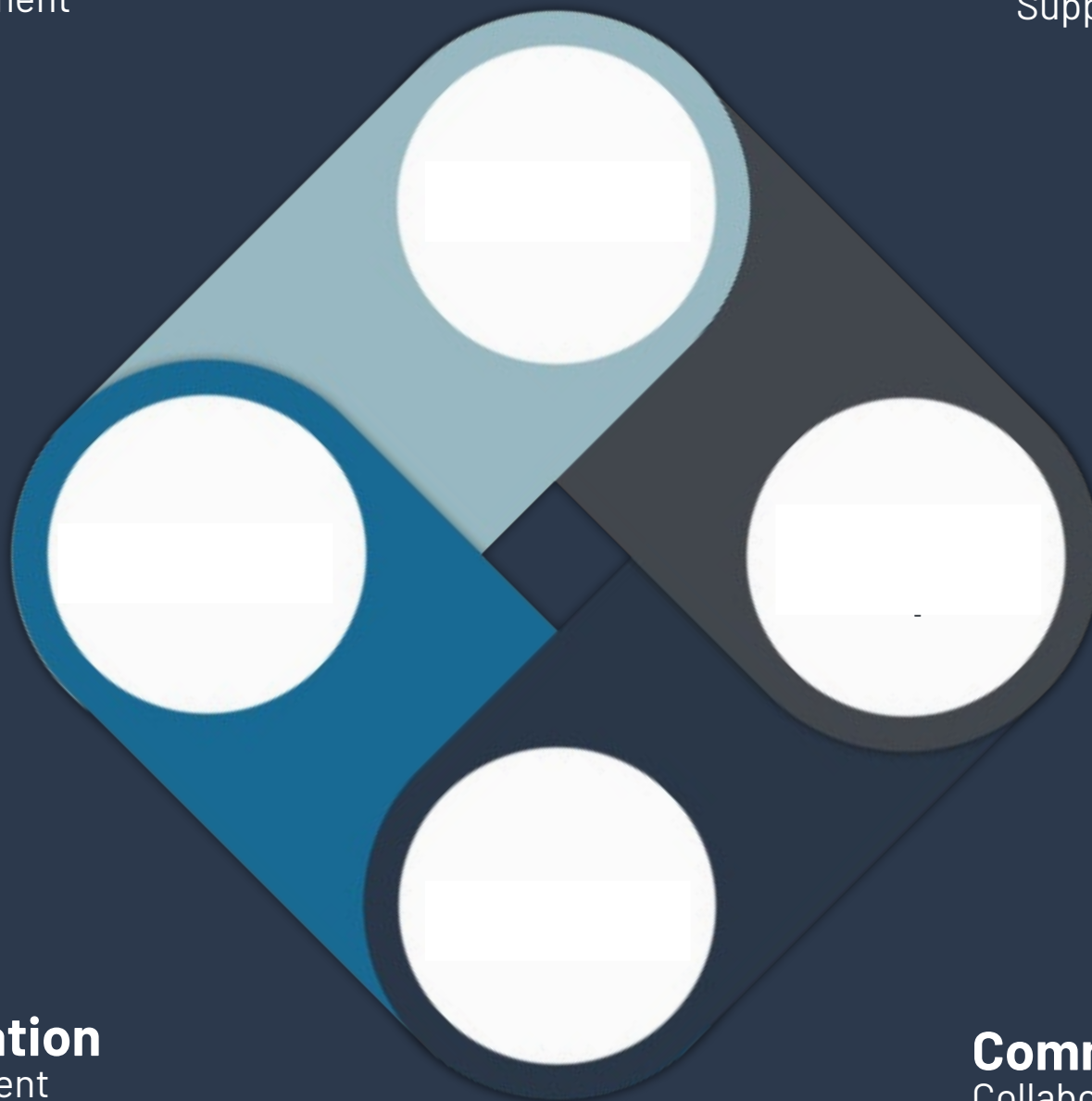
 **Visitor**
Engagement

Partner
Support 

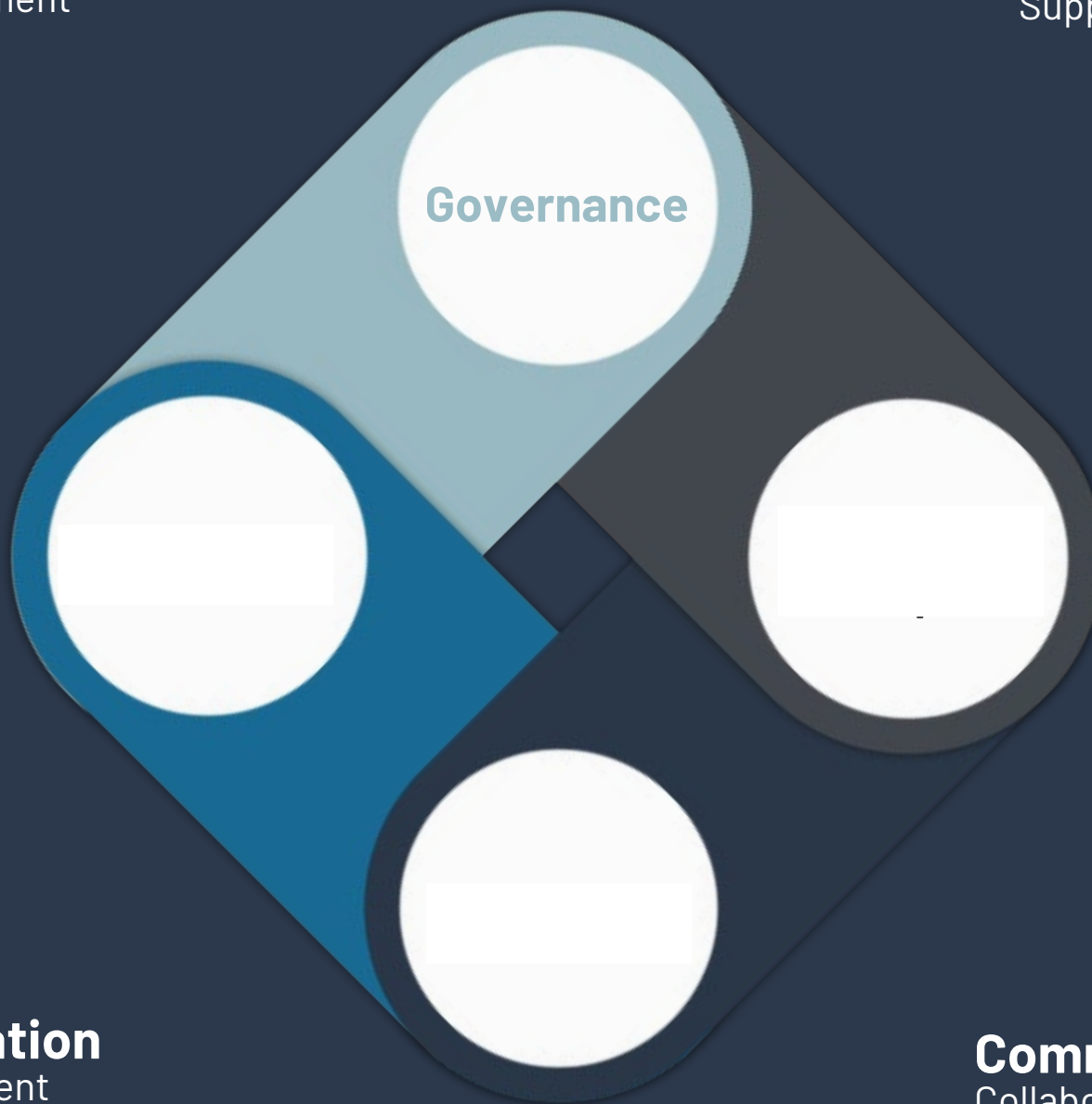
The DMO of the Future

 **Destination**
Development

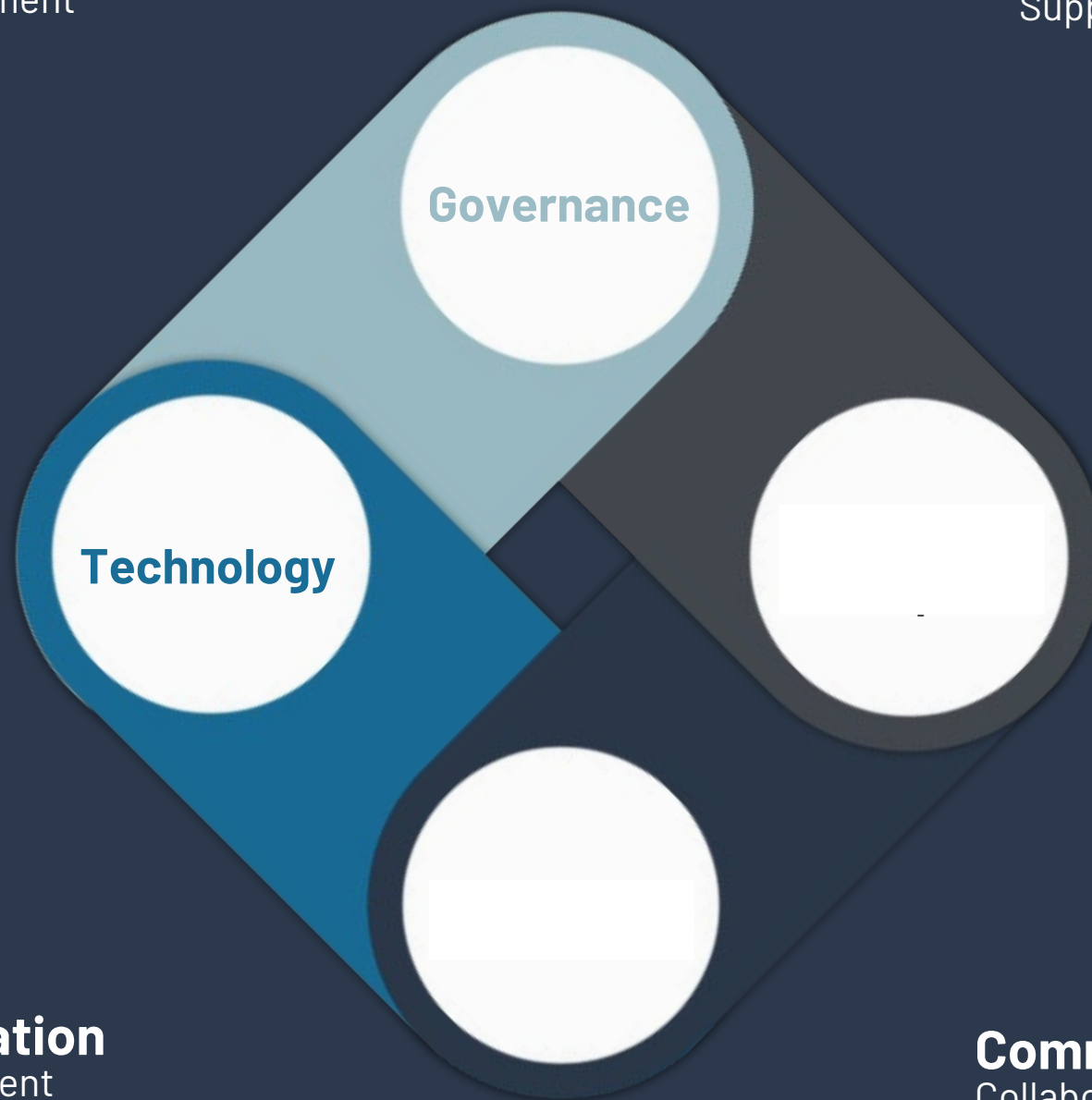
Community
Collaboration 



The DMO of the Future



The DMO of the Future



The DMO of the Future



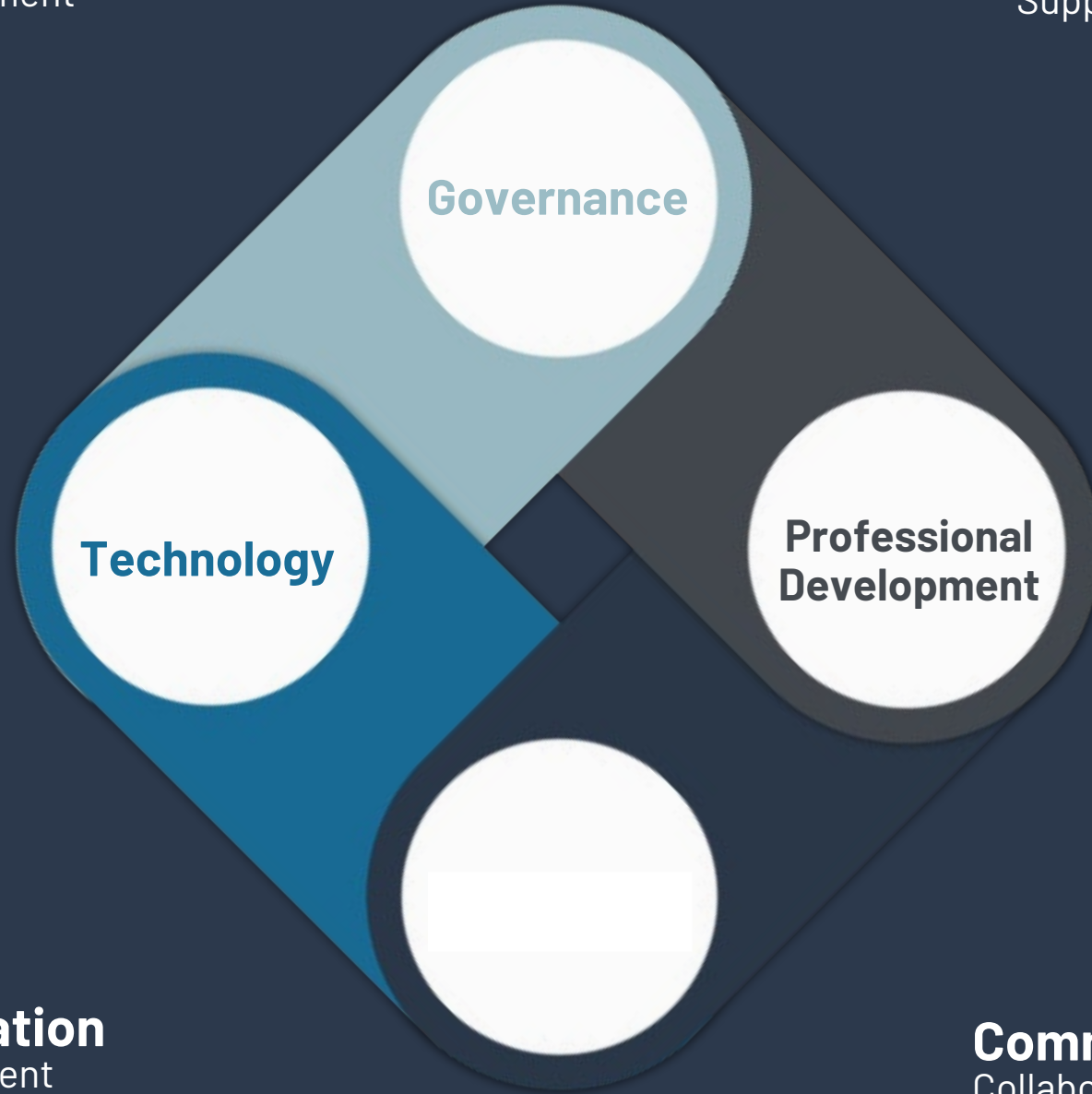
Visitor
Engagement

Partner
Support



Destination
Development

Community
Collaboration



The DMO of the Future



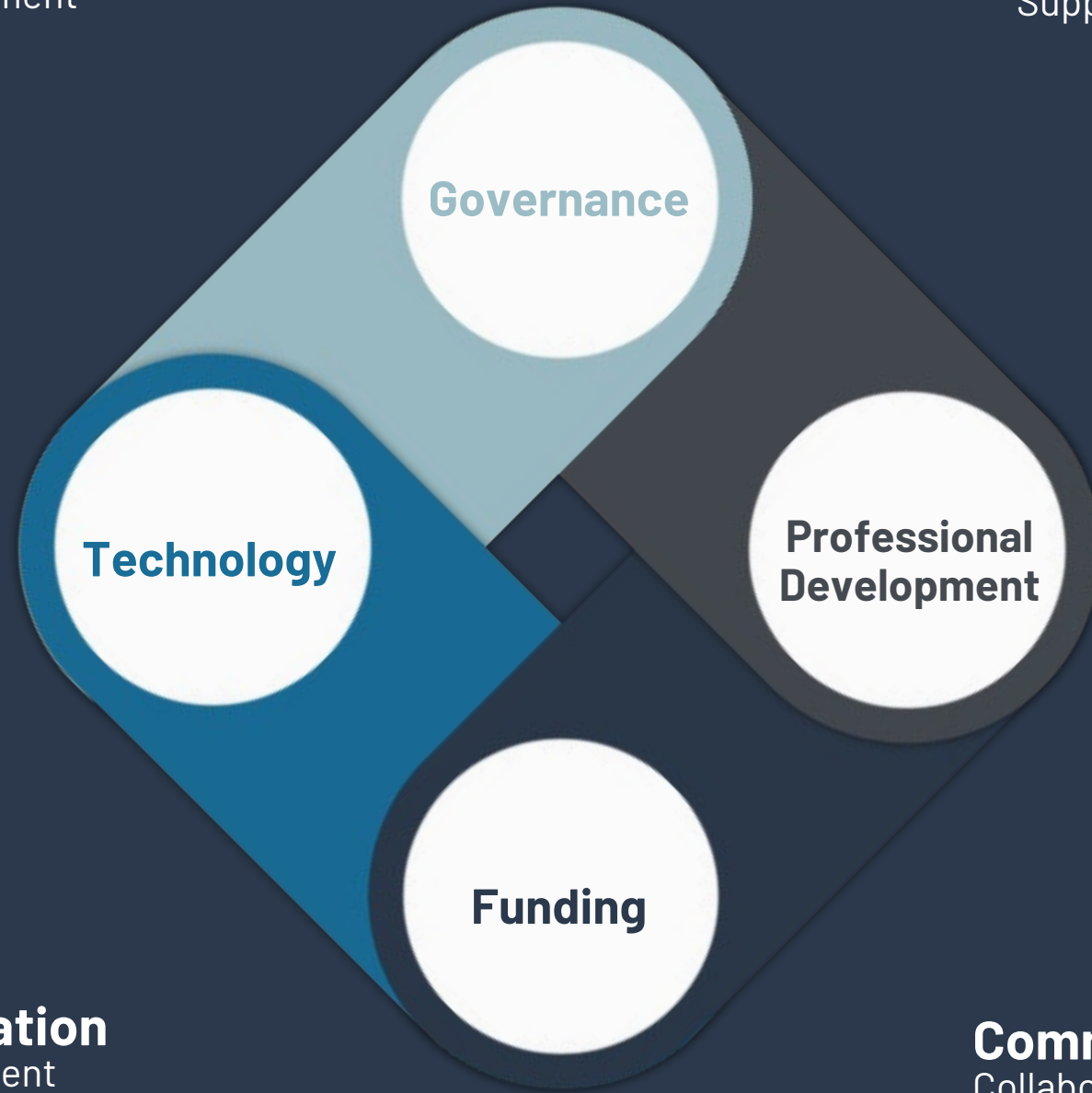
Visitor
Engagement

Partner
Support



Destination
Development

Community
Collaboration



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.

When you measure your 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.

"Measuring Up."

By Doe
Zantamata



Change your vocabulary

“Tourism” is a segment of the travel industry

“Tourism” sounds like Florida

“Travel industry” commands respect



If you want to go fast, go alone

If you want to go far, go together

– African proverb



Thank You!

Paul Ouimet

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DESTINATION
NEXT



MMGY NextFactor

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