

DESTINATION NEXT

Mat-Su Tourism Summit

Government Peaks Chalet
November 1, 2017



About Destination NEXT

Vision:

Provide destination organizations with a powerful assessment tool and practical actions and strategies for sustainable success in a dramatically changing world

Sponsor:

Funded by a grant from the Destinations International Foundation

Three Phases:

1. 2014 Futures Study on Key Trends & Opportunities
2. Scenario Model & NEXTPractices
3. 2017 Futures Study Update



Agenda

- 1) Present
DestinationNEXT
findings and
scenario model
- 2) Discuss
assessment
results for
Boulder
- 3) Breakout groups
- 4) Other items

FUTURES STUDY

Top Trends



**Smart
Technology**

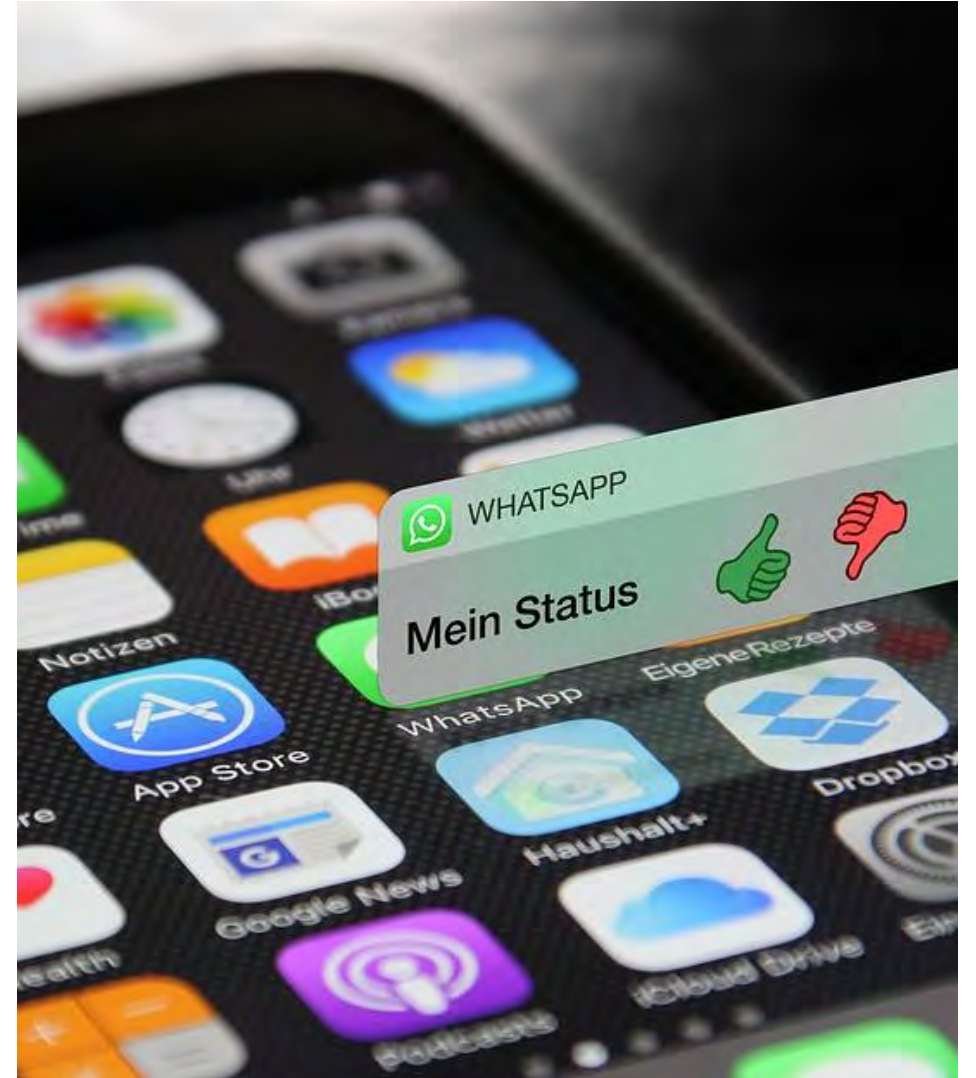


Social Media

Engagement

Consider that every minute of the day:

- **3.5 million search queries** made on Google (60% on mobile devices)
- **4.1 million videos** viewed on YouTube (consumers prefer video 4:1 over print to learn about product)
- **46,200 images posted** on Instagram (48% of users use platform to help choose vacation destinations)
- **2,853 new mobile phones** activated in the U.S. alone



TripAdvisor

- Founded in 2000
- Largest travel site in the world
- 62% of hotel guests around world visit site before making a booking



Hotels

Vacation Rentals

Restaurants

Things to do

Flights



JOIN



Travelers' Choice: Top hotels

See all

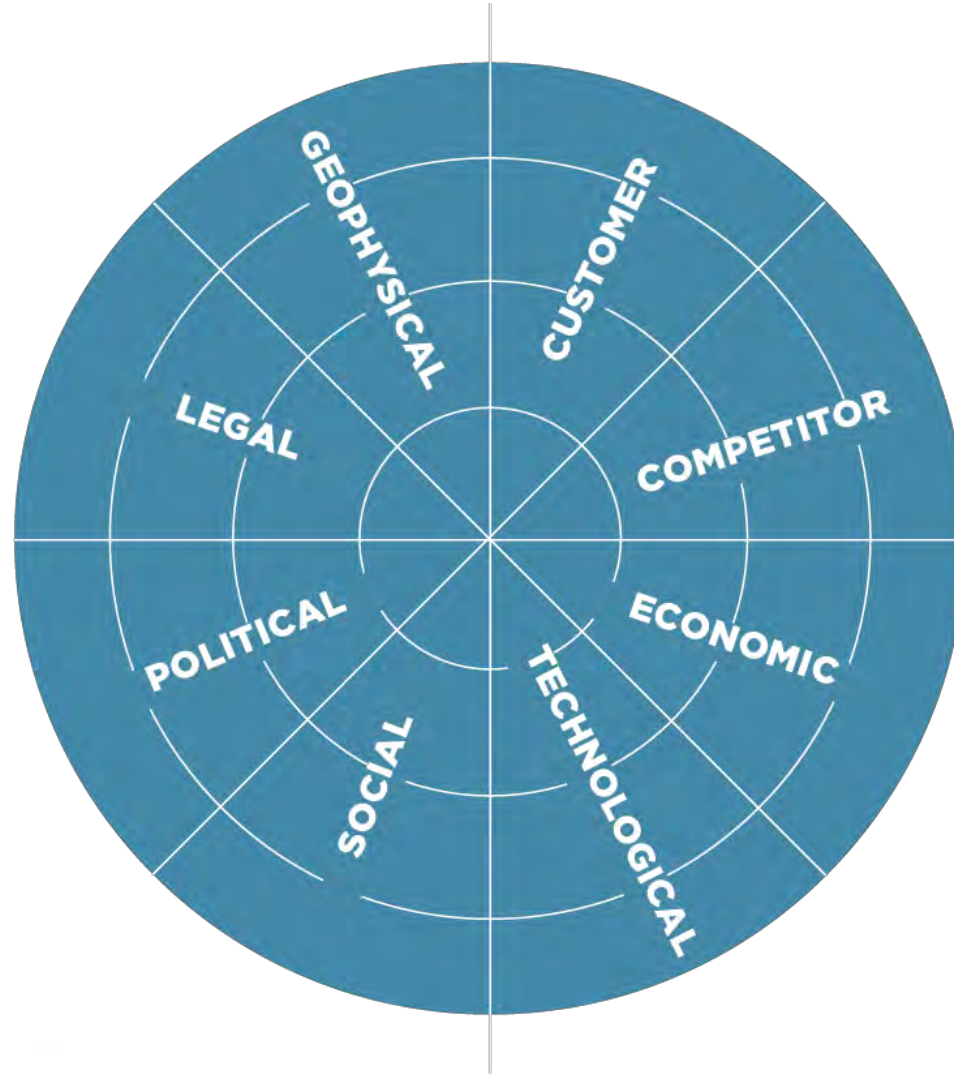


Advisory Panels



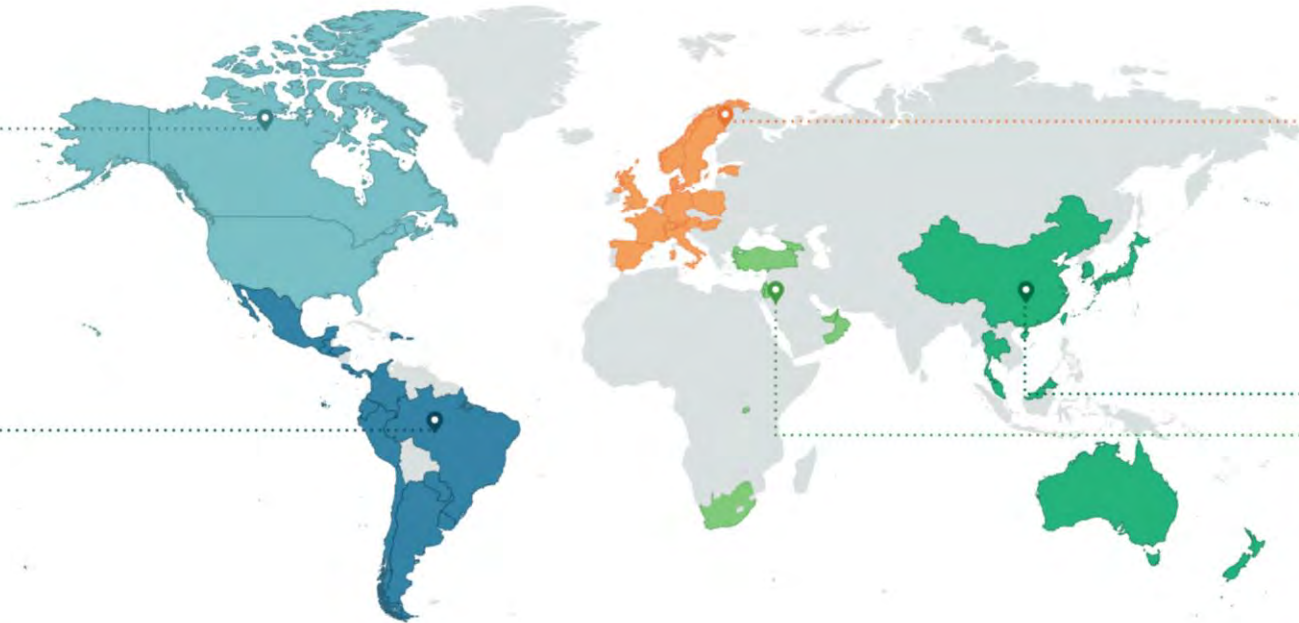
Strategic Radar Map

75
Trends



55
Strategies

We Listened to You



North America

- Bermuda
- Canada
- United States

Latin America

- Argentina
- Brazil
- Chile
- Colombia
- Costa Rica
- Dominican Republic
- Ecuador
- El Salvador
- Guatemala
- Honduras
- Mexico
- Panama
- Paraguay
- Peru
- Puerto Rico
- Uruguay

Europe

- Austria
- Denmark
- Estonia
- France
- Germany
- Hungary
- Italy
- Monaco
- Netherlands
- Norway
- Poland
- Spain
- Sweden
- Switzerland
- United Kingdom

Middle East/Africa

- Bahrain
- Israel
- Jordan
- Oman
- Rwanda
- South Africa
- Turkey
- United Arab Emirates

Asia Pacific

- Australia
- China
- Georgia
- Hong Kong
- Japan
- Malaysia
- New Zealand
- Singapore
- South Korea
- Taiwan
- Thailand

 **433 participants**

 **52 countries**

KEY TRENDS



DESTINATIONS
INTERNATIONAL

Top 25 Trends & Strategies

12

New Trends

10

New Strategies

A night scene of a fire festival. In the foreground, a large, bright fire burns on a float that is partially submerged in water. The fire is reflected in the water's surface. In the background, other floats with fires are visible, and a crowd of people can be seen on the left side of the image. The overall atmosphere is dark and dramatic, with the fire providing the primary light source.

Personalized, unique & authentic experiences

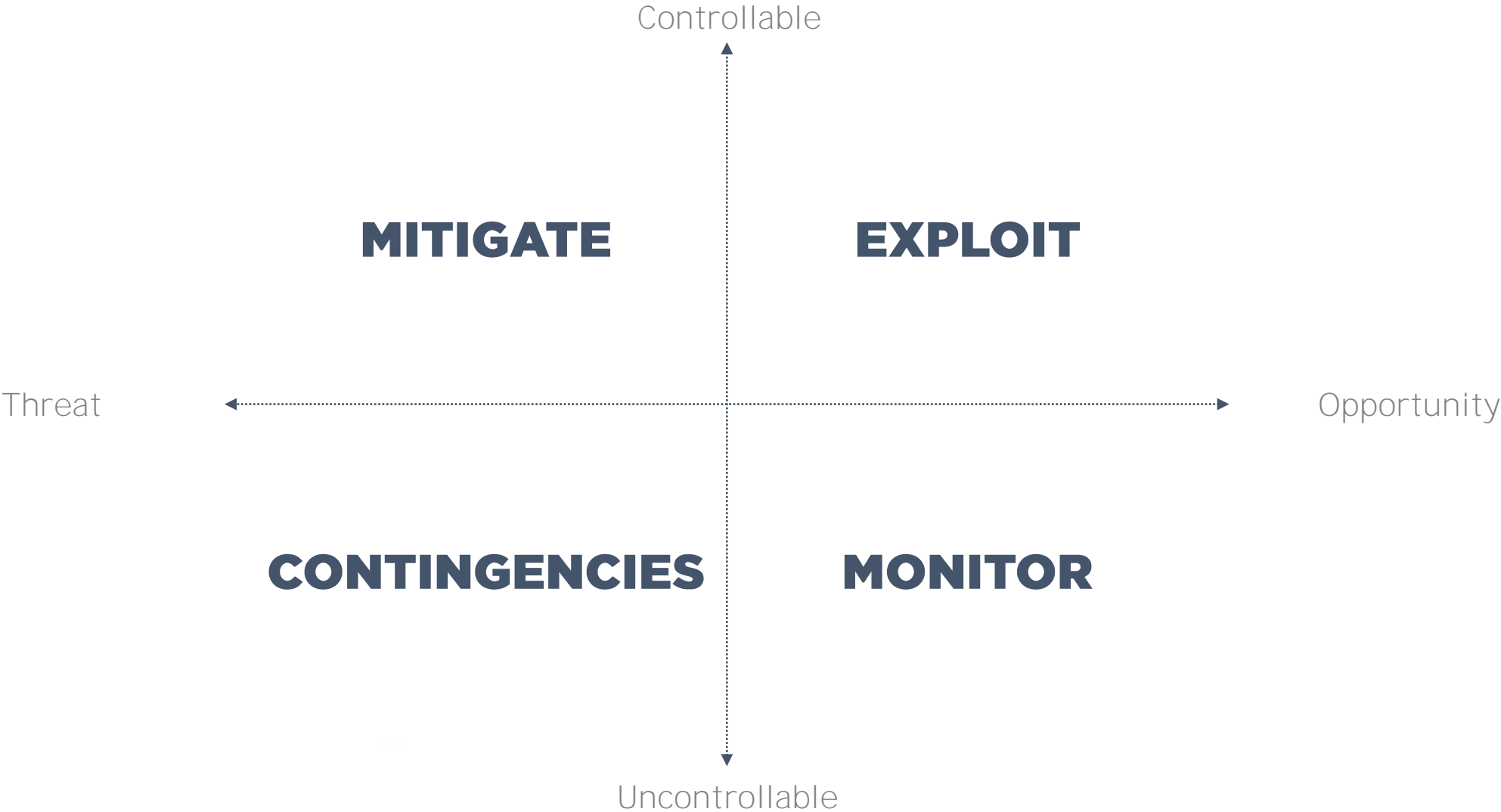
A black and white photograph of a man in a suit kneeling on a patterned rug. He is holding a long-handled tool, possibly a floor polisher. To his right are several boxes of Kirby Floor Polisher. The Kirby logo is visible on the boxes. The text "Less sales, more strategic partnerships" is overlaid in white on the image.

Less sales, more strategic partnerships



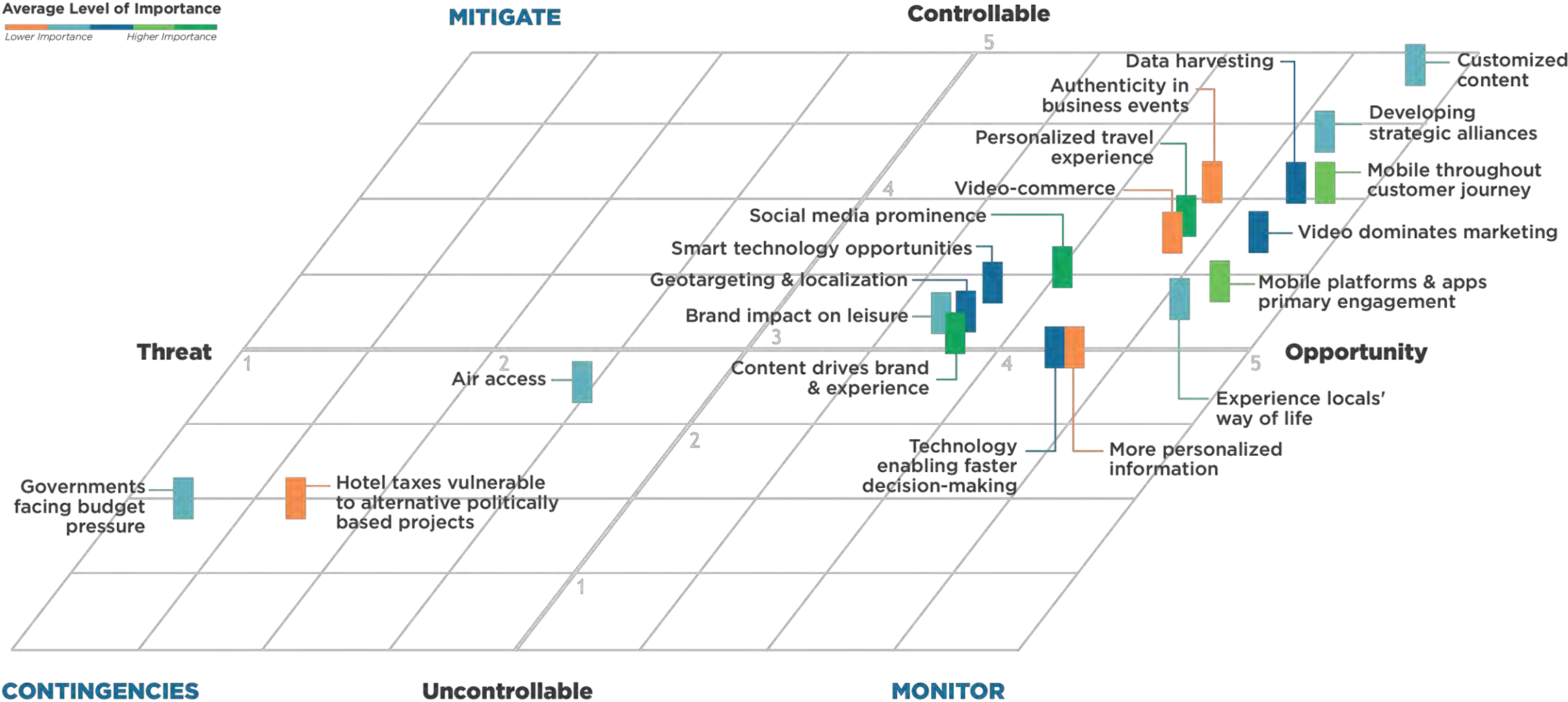
Sustainable tourism

Future Map



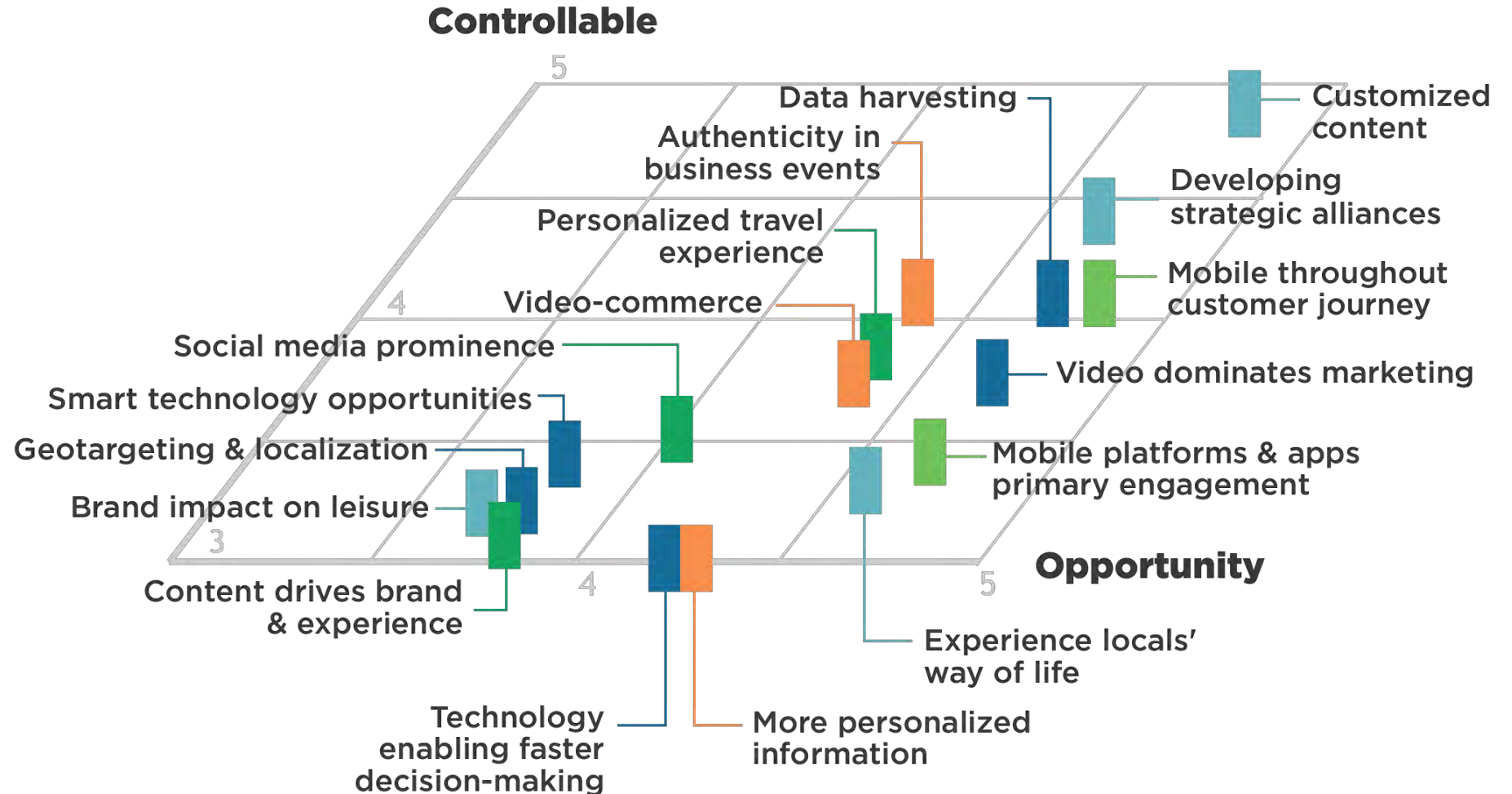
Future Map - Top 25 Trends

Average Level of Importance
Lower Importance Higher Importance



Future Map - Top 25 Trends

Average Level of Importance





Transformational Opportunities



#1: Broadcast to Engagement

Interacting with & leveraging the new marketplace



#2: Brand Building

Building & protecting the destination brand



#3: Collaboration & Partnerships

Evolving the DMO business model

Atlas Obscura

- Over 700 of curious & strangest places
- Atlas published in 2016
- Nearly 1 million followers



Wayblazer

- Established in 2014 by Terry Jones, founder of Travelocity and Kayak.com
- Powered by IBM Watson Analytics
- Queries in common language

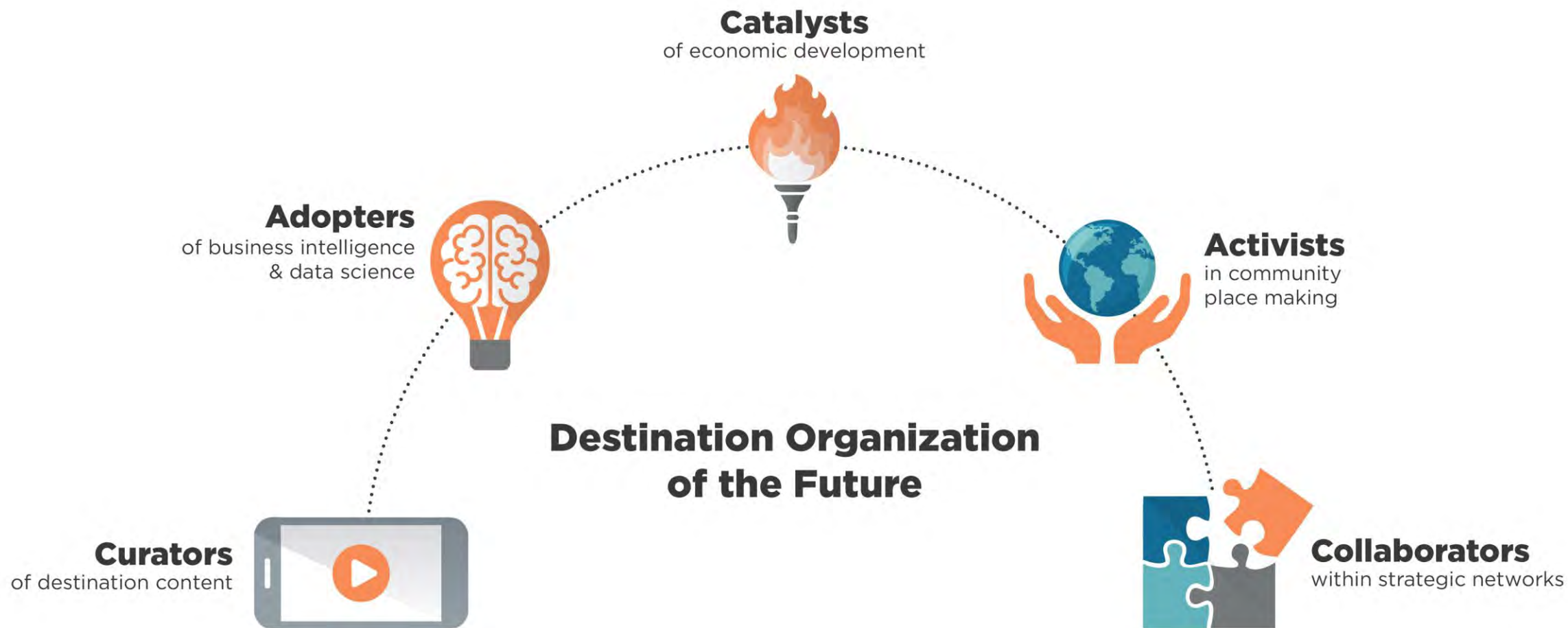


Destination Organization of the Future

New Destination Organization Start-up

Rank	Role
1	Brand marketing
2	Destination and product development
3	Meeting and convention sales
4	Broader economic development
5	Destination information resource
6	Industry advocate and association leader
7	Leisure sales (group tour and independent)
8	Visitor experience servicing
9	Major event partner/developer
10	Convention services
11	Venue management and operations

Re-engineering the Destination Organization



CURATORS of destination content

Curators

1. Invest more effort and resources into video content to market the destination.
2. Focus significant attention to content creation and dissemination strategies.
4. Develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.
9. Place greater emphasis on engaging with their customers in two-way conversations.
20. Participate more in building platforms to improve visitor experience.

ADOPTERS

of business intelligence
& data science

Adopters

8. Agree to uniform methodology with other destination organizations to measure economic impact.
11. Develop new strategies to refocus on the millennial market.
15. Adopt operating standards and consistent measures of performance with other destination organizations.
16. Agree to a uniform methodology with other destination organizations to measure economic impact.
17. Put a greater emphasis on market segmentation.
19. Invest more effort in scanning the market for business intelligence.

CATALYSTS of economic development

Catalysts

- 5. Play more of a central role in advocacy in my destination.
- 10. Be more involved in broader economic development projects and initiatives.
- 13. The economic impact of tourism (and conventions) will be better understood in my destination.
- 23. Take a more active role in political and legislative issues impacting events.



ACTIVISTS

in community place making

Activists

3. Focus on developing authentic experiences for the customer.
6. Enhance our engagement with the local community to manage future tourism considerations.
7. Develop strategies to protect what we have while attracting events and visitation to our community.
12. Connect visitor experience with the quality of life of residents in my community.
18. Take on a greater role as cultural champion of my destination.
22. Pay close attention to safety and security as a strategic consideration in our future planning.

COLLABORATORS

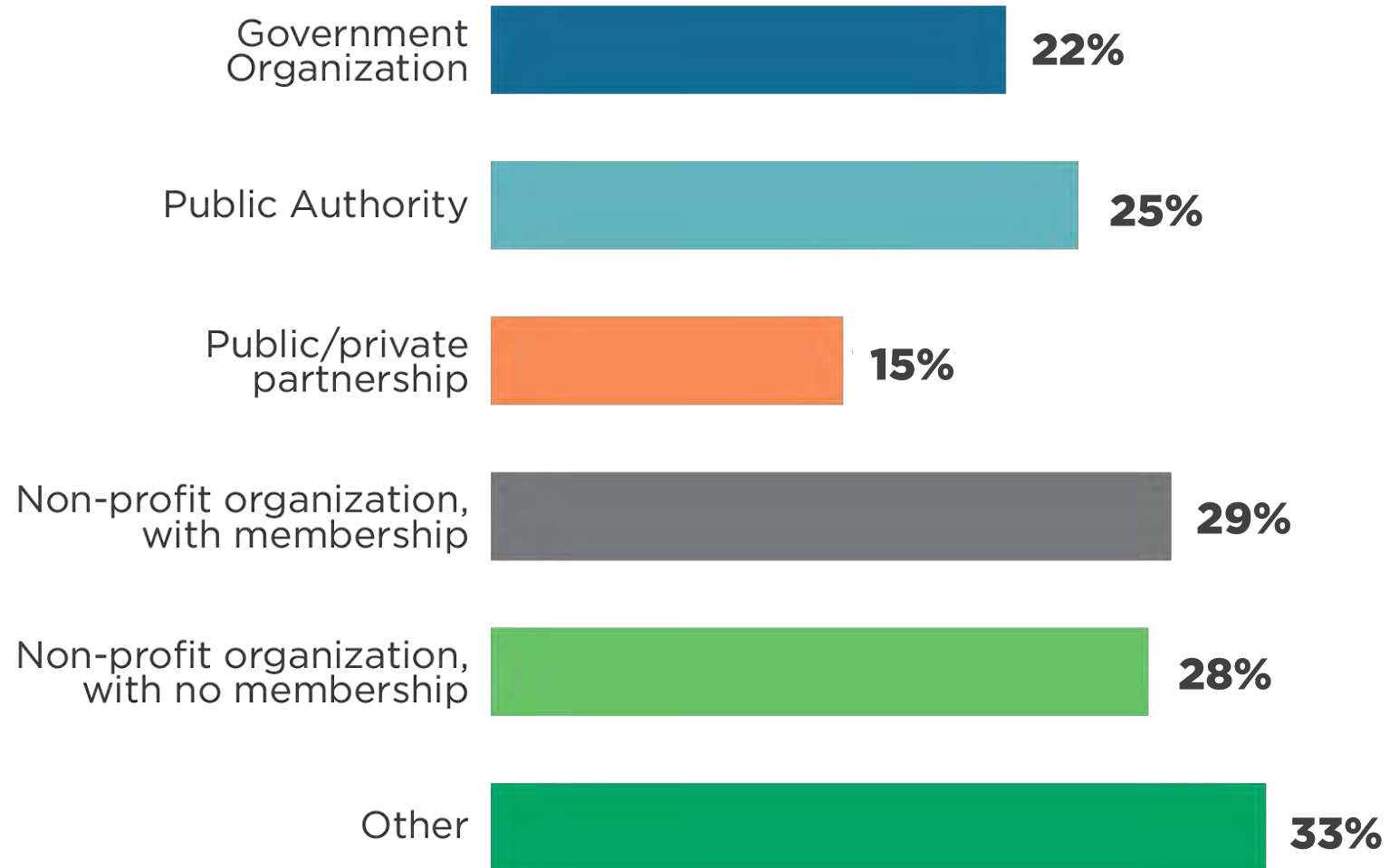
within strategic networks

Collaborators

3. Form more strategic alliances outside the industry.
21. Engage more closely with non-traditional stakeholders in my destination.
25. Place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination.

Organizational Model

Expected Change in the Next 5 Years



SCENARIO MODEL

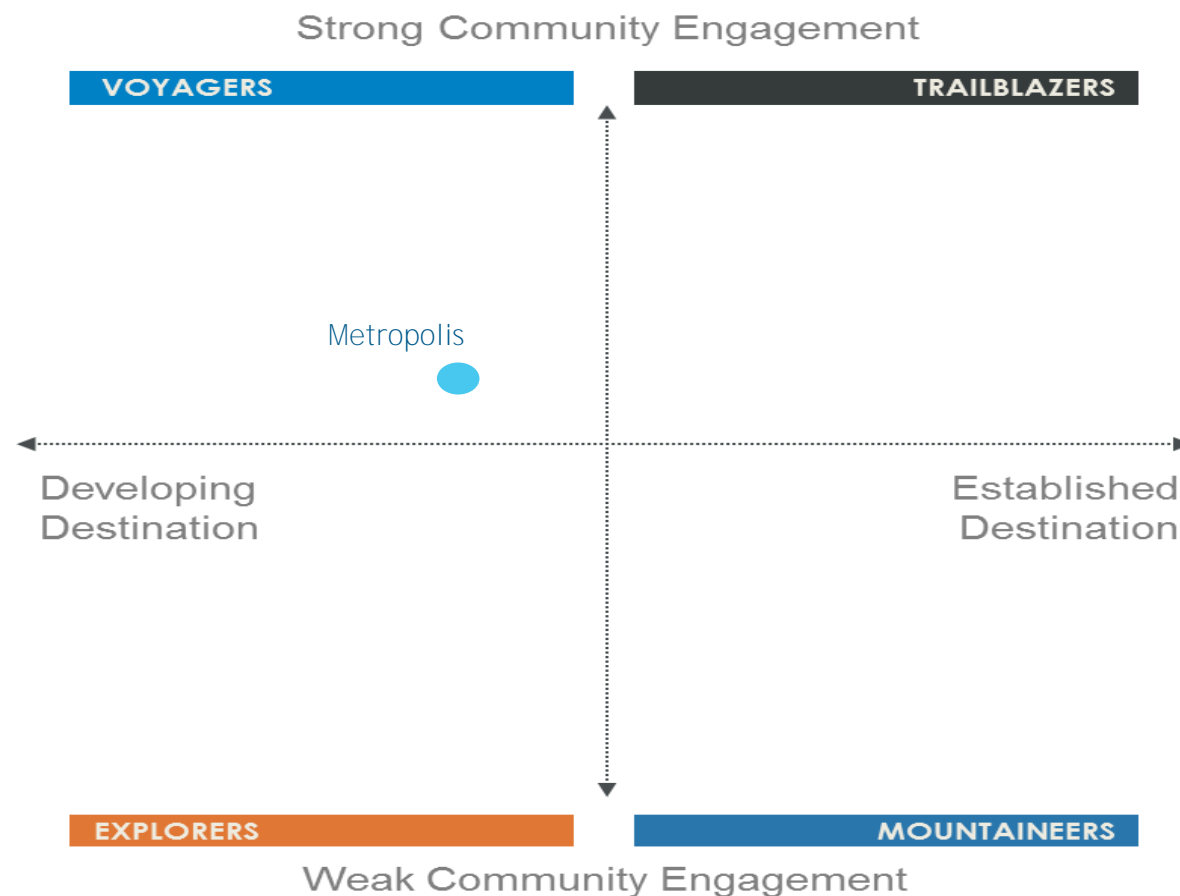
Scenario Model



Purpose of Diagnostic Tool

Scenario model intended to be strategic diagnostic tool, not a benchmarking index to rank DMOs, CVBs or destinations

Objective self-assessment to help identify priorities and strategies for the future



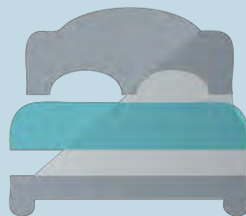
Destination Strength Variables



**Destination
Performance**



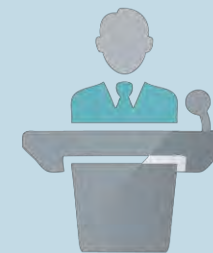
Brand



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**



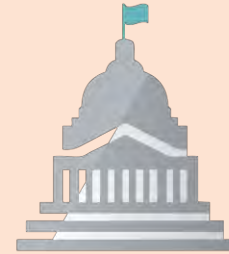
**Membership Strength
& Support**



Industry Support



**Local Community
Support**



**Policy and
Regulatory Environment**



Workforce



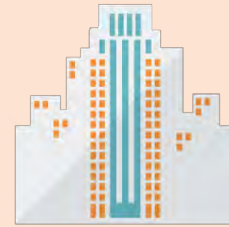
Hospitality Culture



Regional Cooperation



**Funding Support &
Certainty**



Economic Development

Destination Assessments



325

destinations from
18 countries



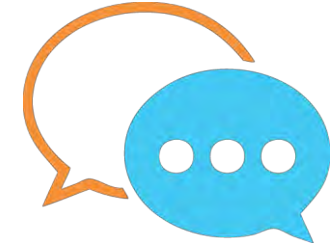
131

detailed
assessments
completed in 10
countries



50

underway or
planned,
including 4 other
countries



65

in discussions,
including
14 other countries

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

Dominican Republic, El
Salvador, Brazil, Ecuador

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

Destinations Completed - U.S.



Destinations Completed - International



DESTINATION NEXT

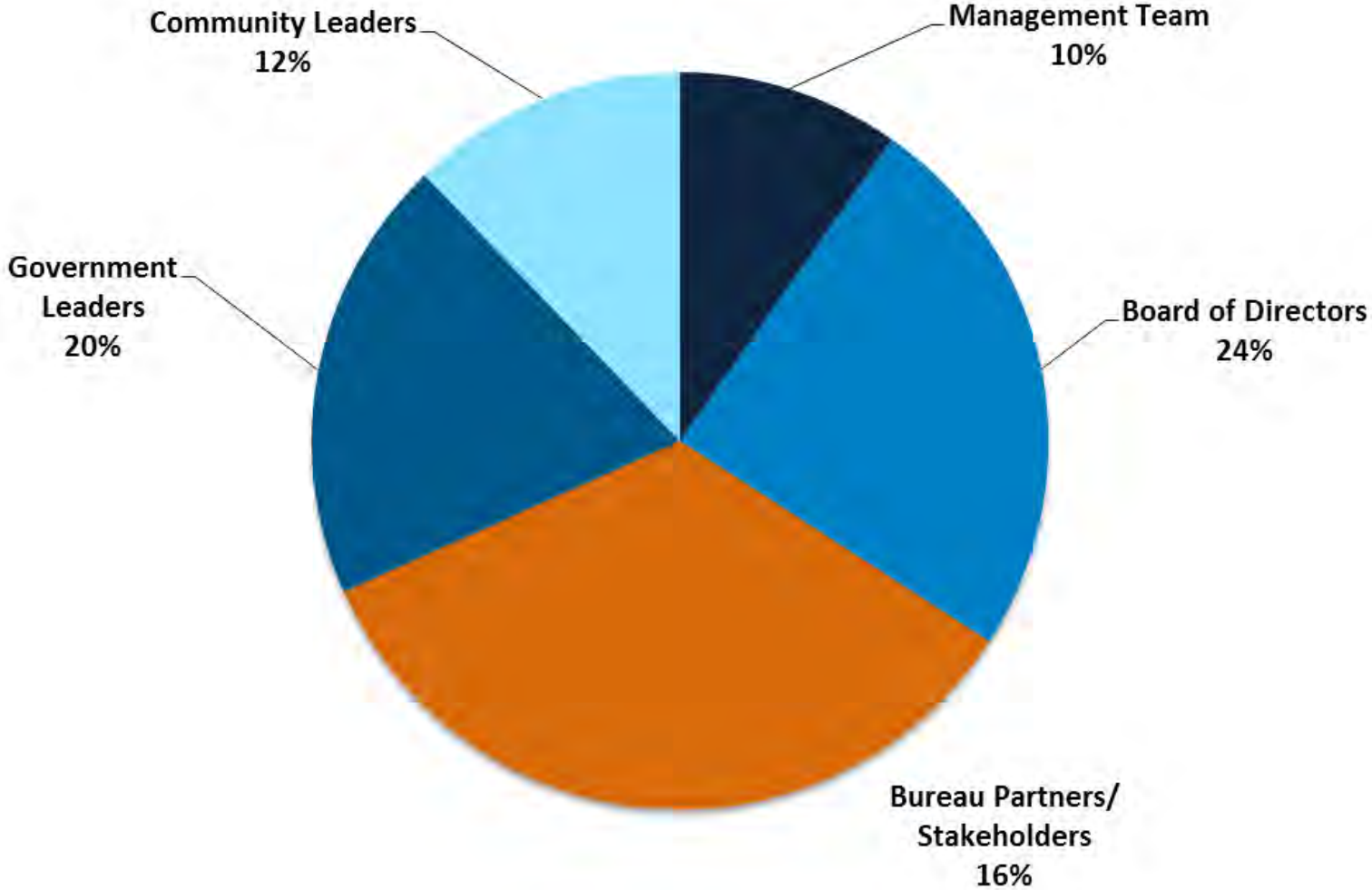
Multi-User Online
Diagnostic Tool Results:

Mat-Su Borough, AK

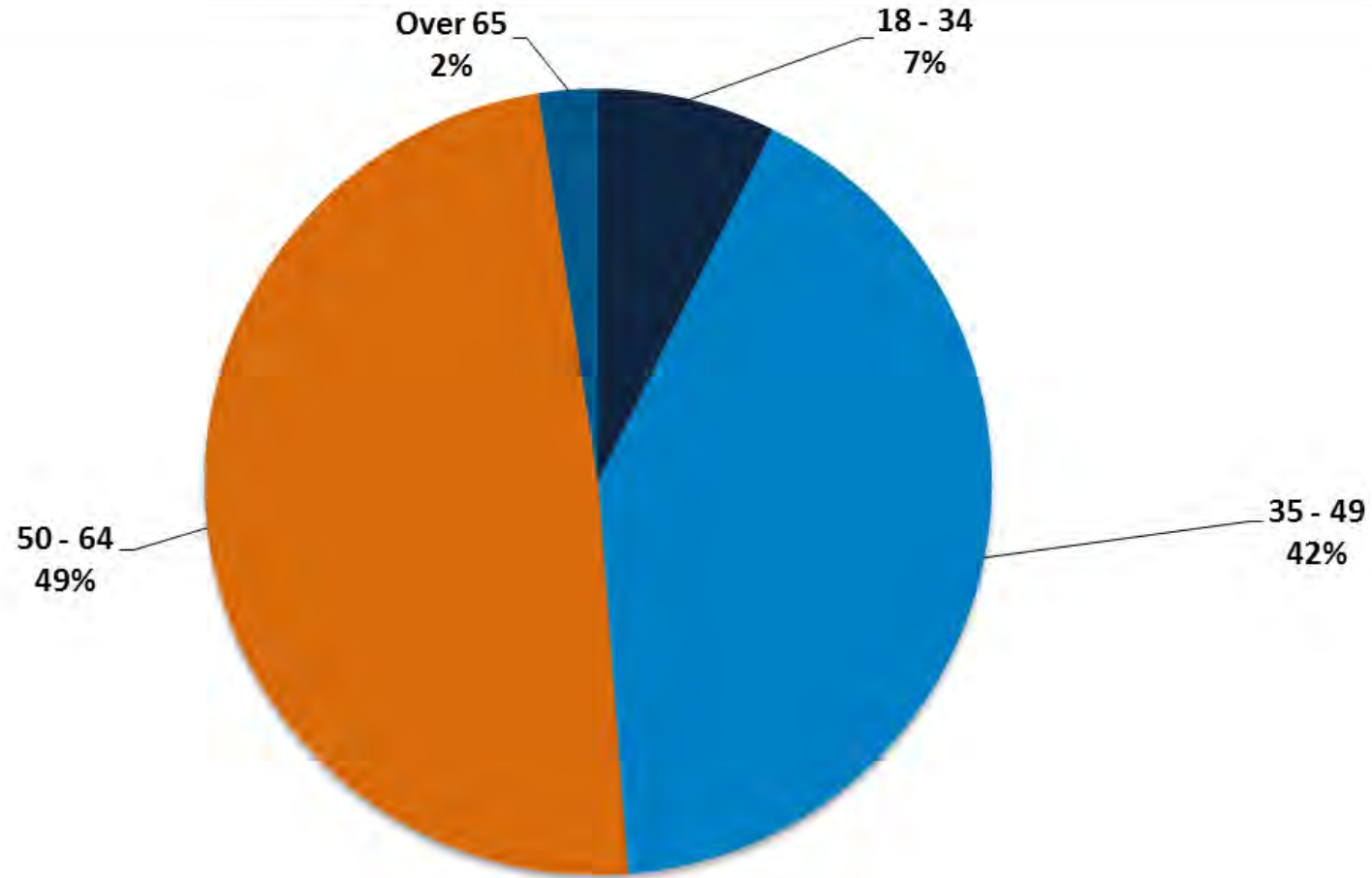
October 25, 2017



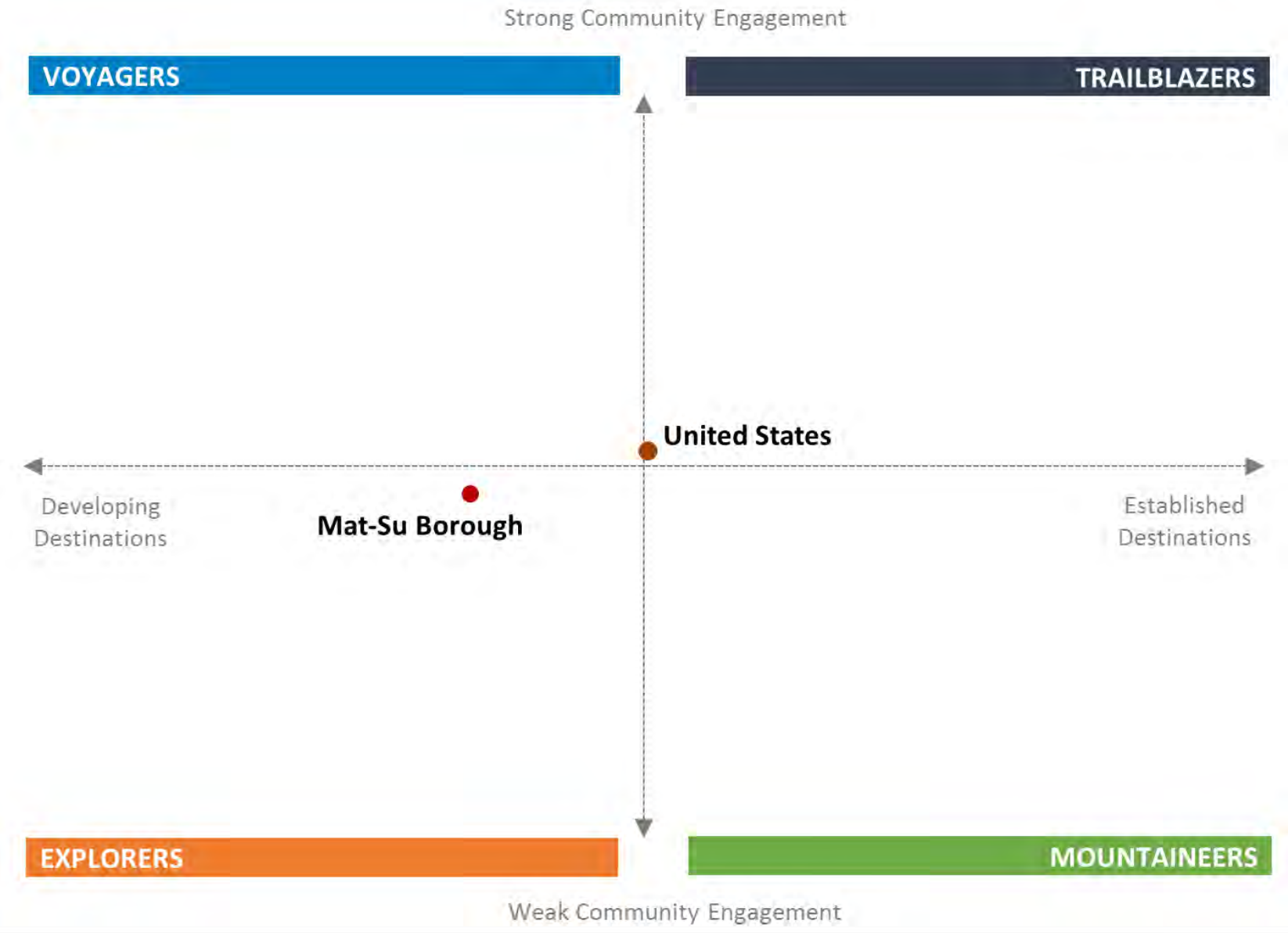
41 Responses



Age Demographic



Mat-Su Borough Overall Assessment - Industry



Explorers

These DMO's and destinations desire an inspired tourism vision and activated community to make it happen.

Key Strategic Challenges

Above all else:

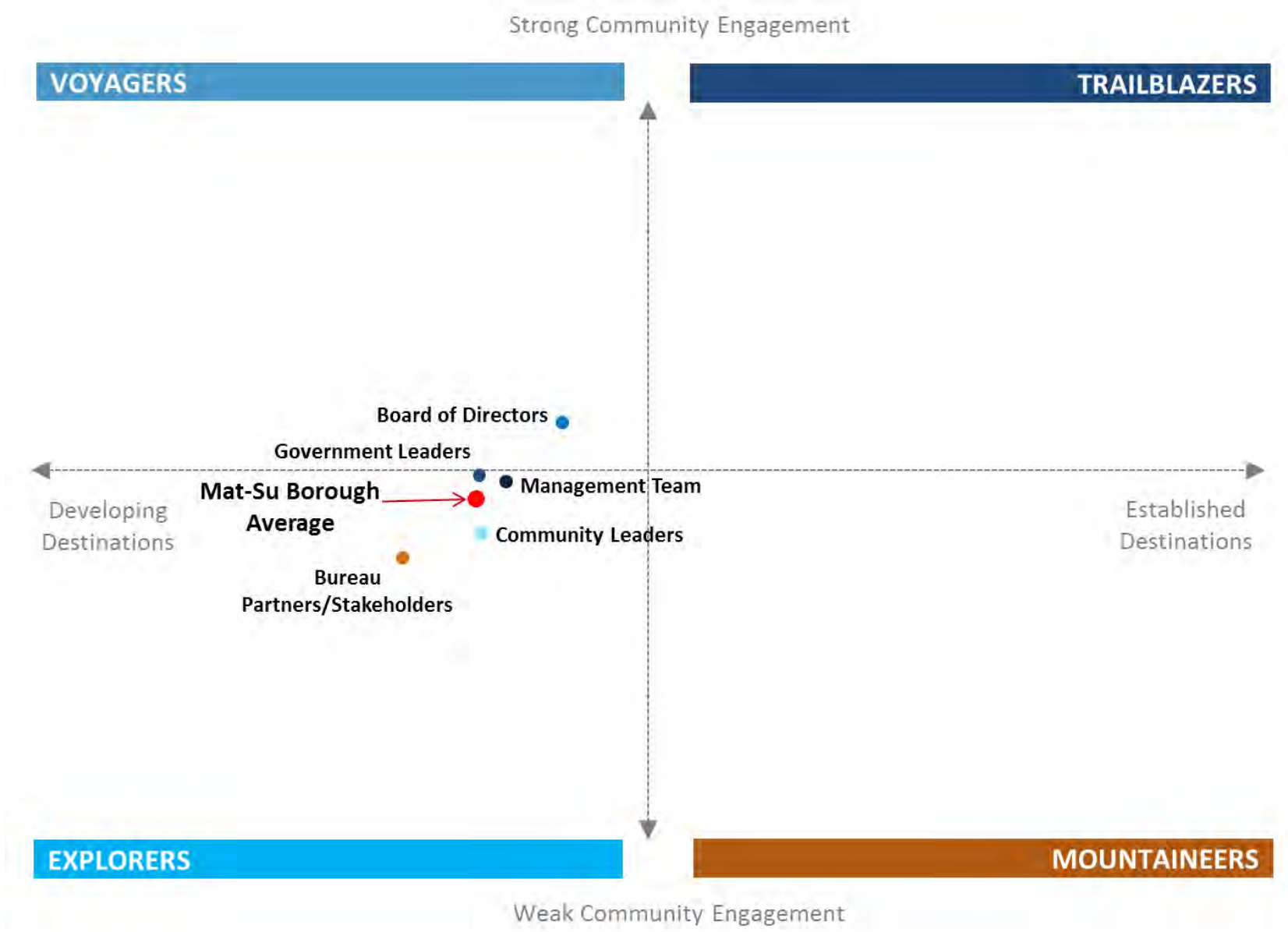
- Rallying the community to work together towards a realistic vision and strategy
- Building community recognition and acceptance that transformational change is needed
- Implementing the strategy with limited resources

Developing Destination

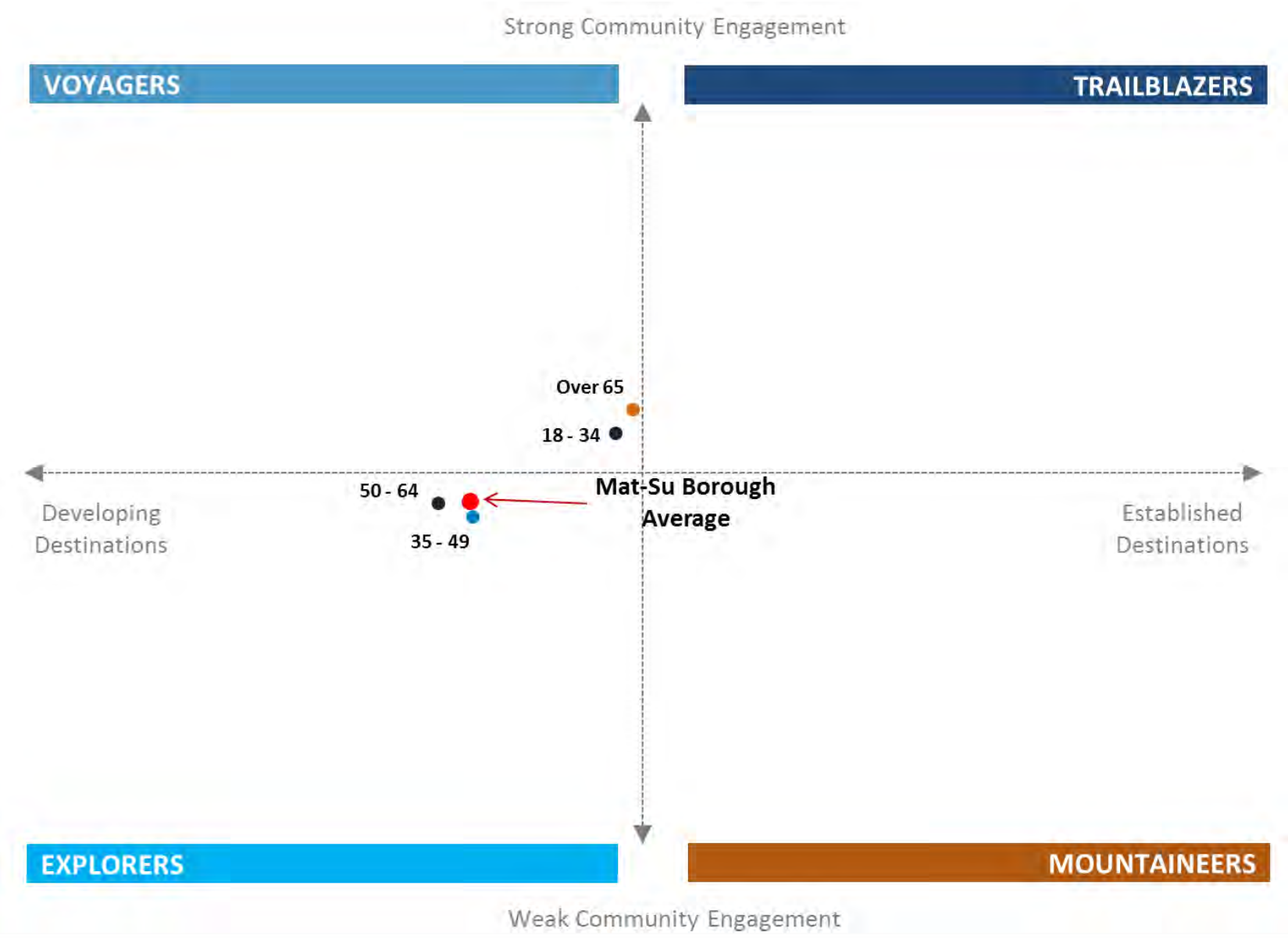


Weak Community Engagement

Mat-Su Borough Overall Assessment - Stakeholder



Mat-Su Borough Overall Assessment – Age Group



Destination Strength Rankings – Mat-Su Borough



Relative Importance

Perceived Performance



Attractions & Entertainment

1st

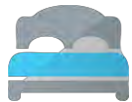
3rd



Communication & Internet
Infrastructure

2nd

5th



Accommodation

3rd

9th



Destination Performance

4th

1st

Destination Strength - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Mat-Su Borough Average	Standard Deviation	Industry Average	Mat-Su Borough Average	Standard Deviation
Attractions & Entertainment	12%	13.0%	2%	3.68	3.24	0.75
Communication & Internet Infrastructure	7%	12.0%	3%	3.32	2.99	0.75
Accommodation	12%	12.0%	2%	3.42	2.40	0.76
Destination Performance	12%	11.9%	3%	3.83	3.56	0.89
Mobility & Access	7%	11.5%	3%	3.04	2.54	0.71
Brand	13%	11.5%	3%	3.21	3.25	0.66
Events	9%	10.1%	2%	3.73	3.15	0.73
Sports & Recreation Facilities	9%	9.1%	3%	3.32	2.53	0.98
Convention & Meeting Facilities	10%	8.9%	3%	3.12	2.67	0.83

DESTINATION STRENGTH - Mat-Su Borough

2.93

INDUSTRY AVERAGE DESTINATION STRENGTH

3.49

RESULTING SCENARIO

EXPLORERS

Note

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.

Destination Strength – Stakeholder Report Card

Variable	Mat-Su Borough Average	Perceived Performance (1-5 scale)				
		Management Team	Board of Directors	Bureau Partners/ Stakeholders	Government Leaders	Community Leaders
Attractions & Entertainment	3.24	3.64	3.44	2.77	3.38	3.60
Communication & Internet Infrastructure	2.99	3.31	3.01	2.89	2.92	3.05
Accommodation	2.40	2.56	2.63	2.52	2.16	1.85
Destination Performance	3.56	3.45	4.02	3.27	3.58	3.52
Mobility & Access	2.54	2.25	2.71	2.30	2.73	2.76
Brand	3.25	3.55	3.61	2.92	3.30	3.16
Events	3.15	3.40	3.36	2.78	3.33	3.28
Sports & Recreation Facilities	2.53	2.58	2.50	2.14	2.63	3.47
Convention & Meeting Facilities	2.67	2.40	3.14	2.69	2.39	2.36

DESTINATION STRENGTH	2.93
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

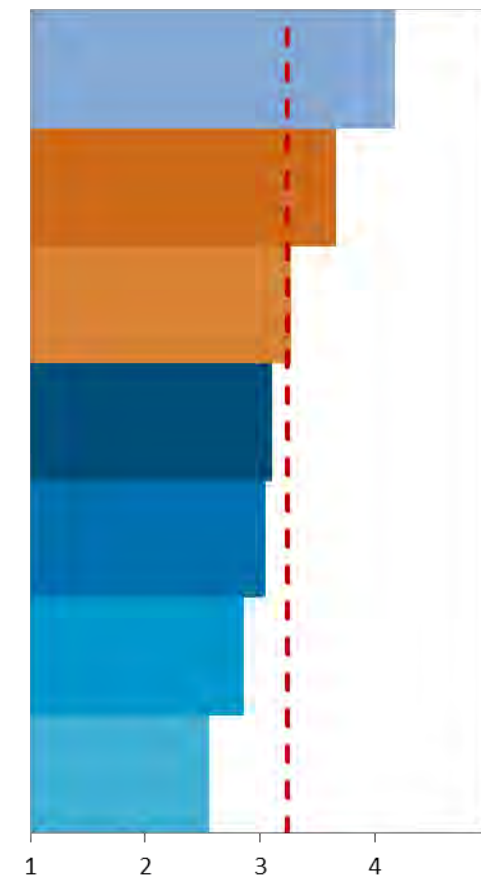
RESULTING SCENARIO **EXPLORERS**

Note

Green shading signifies that the stakeholder group outperformed the destination average by greater than 0.2.
 Yellow shading signifies that the stakeholder group underperformed the destination average by greater than 0.2 but less than 0.4.
 Red shading signifies that the stakeholder group underperformed the destination average by greater than 0.4.

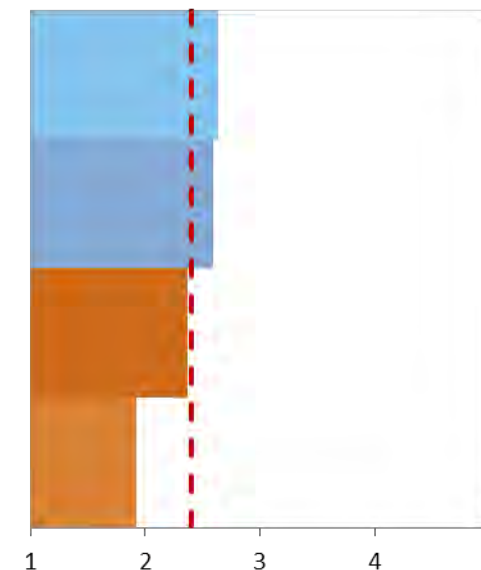
Attractions & Entertainment

- Wide diversity of parks and bike trails
- Authentic and unique attractions and entertainment opportunities
- Large, famous attractions that cause people to stay
- High-quality and wide-ranging arts and cultural attractions
- Unique and high-quality dining options
- Diverse and high-quality shopping opportunities
- Unique and vibrant neighborhoods



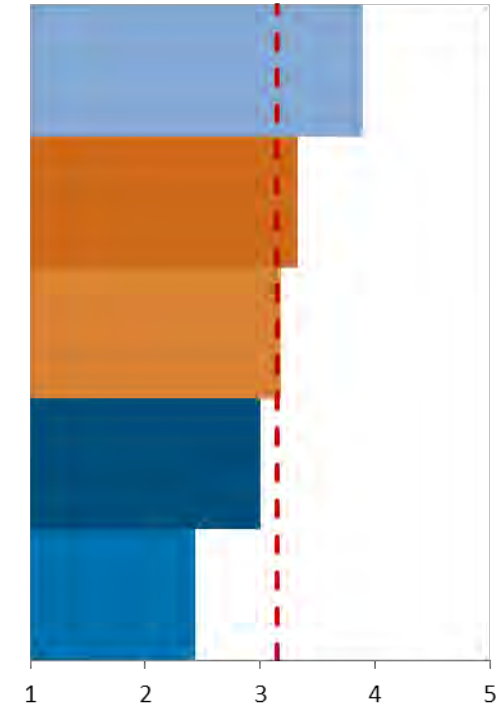
Accommodation

- Location of accommodation options meets visitor needs
- Adequate accommodations capacity
- Diversity of accommodation price options
- Sufficient number of large, headquarter hotels to meet demand



Events

- Abundance of parks and outdoor spaces for handling special events
- Citizens are supportive of hosting major national or international events
- Local government is cooperative and supportive
- Offers a year-long series of major events that drive economic impact
- Diverse facilities/venues with capacity and availability



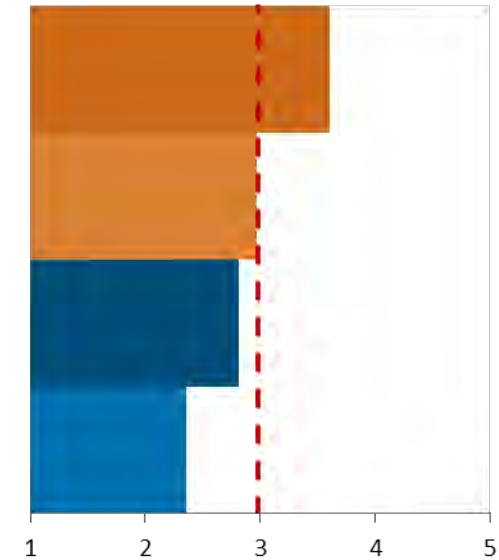
Destination Performance

- Positive growth in overnight visitation
- Communicating the performance and economic impact of our tourism industry
- Hotels are performing well (e.g. Occupancy, RevPAR)
- Adequately measures and tracks the performance of our tourism industry
- Successfully converting leads for meetings and conventions



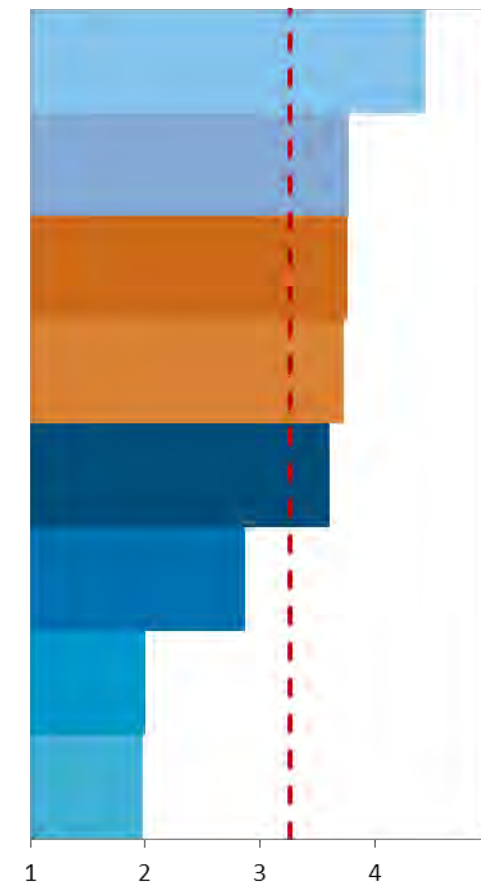
Communication & Internet Infrastructure

- Industry uses and leverages social media to support the brand
- Mobile and Internet coverage/availability
- Wi-Fi access in meeting/conference facilities
- Wi-Fi in outdoor/public areas with high visitor traffic



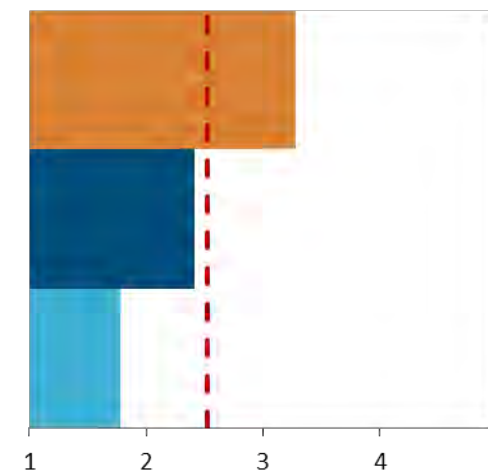
Brand

- Known as being healthy and an outdoor, active city
- Known for having a lot of things to see and do
- Appeals to a wide range of visitors
- Known for being safe, clean, and secure for visitors
- Established brand that is simple, memorable, and market-tested
- Known as an environmentally conscious and sustainable destination
- Known as a high-tech, innovative city
- Prepared to become an international tourism destination



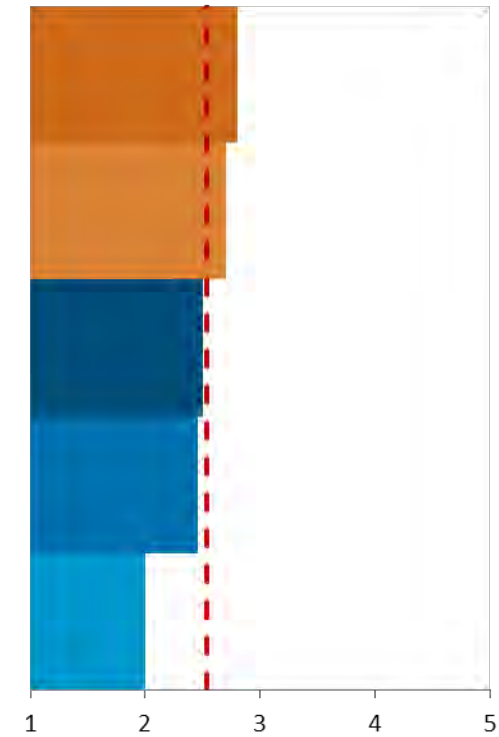
Sports & Recreation Facilities

- Sports fields to host major amateur and collegiate sporting events
- Local sports leadership are engaged in pursuing sporting events
- Venues to host major professional sporting events



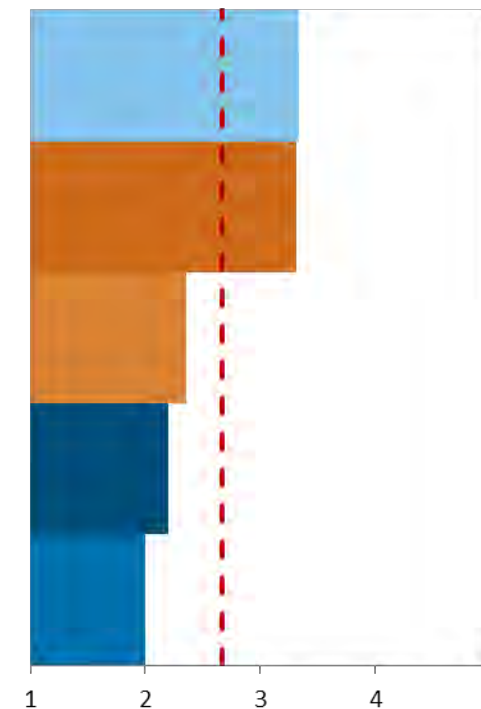
Mobility & Access

- Great directional signage and wayfinding
- Good quality roads that can easily handle traffic
- Bicycle-friendly city with easy, well-marked bike routes
- Good access and services for those with disabilities
- Adequate public transportation



Convention & Meeting Facilities

- Hotels/meeting venues take full advantage of the views
- Good, unique off-site venues for special events
- Abundance of professional and experienced convention services suppliers
- Necessary facilities to compete today
- Necessary facilities to compete for the next 25 years



Community Support & Engagement – Mat-Su Borough



Relative Importance

Perceived Performance



Local Community Support

1st

7th



Regional Cooperation

2nd

1st



Industry Support

3rd

6th



Membership Strength & Support

4th

4th

Community Support & Engagement - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Mat-Su Borough Average	Standard Deviation	Industry Average	Mat-Su Borough Average	Standard Deviation
Local Community Support	11%	10.6%	1%	3.60	3.42	0.71
Regional Cooperation	9%	10.5%	1%	3.58	3.63	1.01
Industry Support	12%	10.5%	1%	3.70	3.34	0.97
Membership Strength & Support	7%	10.3%	1%	3.42	3.59	0.91
Effective Advocacy Program	9%	10.1%	1%	3.39	3.63	0.92
Hospitality Culture	10%	9.8%	1%	3.55	3.46	0.81
Workforce	9%	9.7%	1%	3.16	3.07	0.80
Economic Development	9%	9.6%	2%	3.91	3.69	0.82
Effective DMO Governance Model	11%	9.5%	3%	3.74	3.37	1.09
Funding Support & Certainty	13%	9.5%	3%	3.06	3.32	0.82

COMMUNITY SUPPORT & ENGAGEMENT - Mat-Su Borough **3.44**

INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT **3.60**

RESULTING SCENARIO

EXPLORERS

Note

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Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.

Community Support & Engagement – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale)					
	Mat-Su Borough Average	Management Team	Board of Directors	Bureau Partners/ Stakeholders	Government Leaders	Community Leaders
Local Community Support	3.42	3.67	3.80	2.94	3.58	3.53
Regional Cooperation	3.63	4.13	4.05	3.14	3.81	3.50
Industry Support	3.34	3.63	3.40	3.07	3.63	3.30
Membership Strength & Support	3.59	3.25	3.90	3.32	3.81	3.60
Effective Advocacy Program	3.63	3.67	4.27	3.24	3.79	3.17
Hospitality Culture	3.46	3.25	3.75	3.32	3.38	3.60
Workforce	3.07	3.00	3.65	2.64	3.38	2.70
Economic Development	3.69	3.63	4.05	3.41	3.85	3.53
Effective DMO Governance Model	3.37	3.63	3.95	2.93	3.50	3.00
Funding Support & Certainty	3.32	3.38	3.70	3.36	2.94	3.00
COMMUNITY SUPPORT & ENGAGEMENT						3.44
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						3.60

RESULTING SCENARIO

EXPLORERS

Note

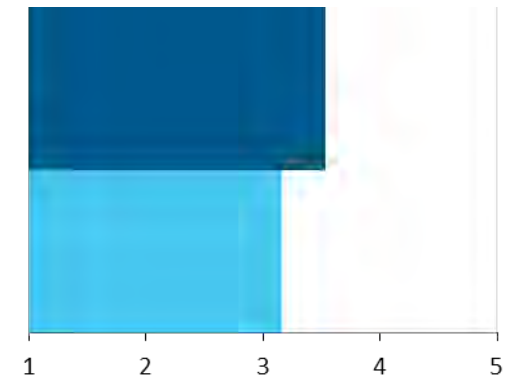
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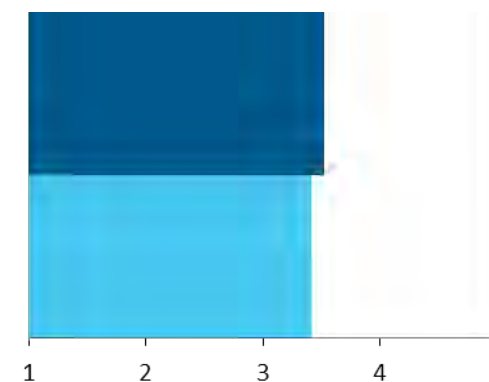
Funding Support & Certainty

- Sufficient revenue sources to fund their strategies
- Stable revenue sources to fund their strategies



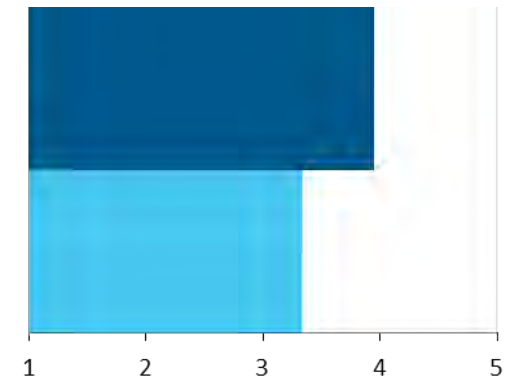
Hospitality Culture

- Hospitality culture that welcomes visitors and improves their experience
- Reputation for offering high-quality customer service



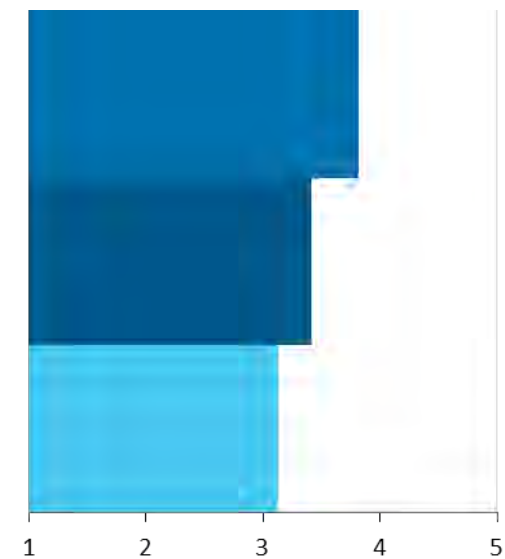
Regional Cooperation

- DMO marketing efforts have broad economic benefits across the region
- There is broad collaboration and coordination among tourism partners



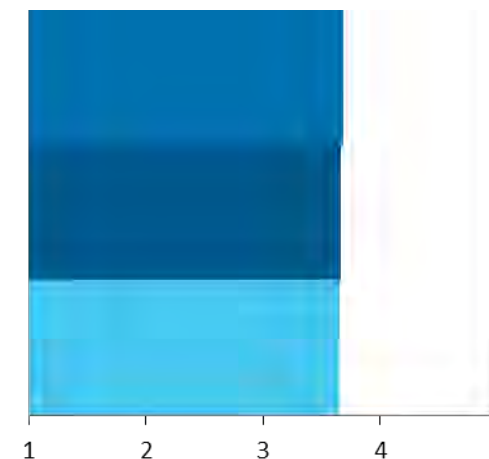
Local Community Support

- Tourism industry gets positive media coverage locally
- Locals have a general understanding/positive perception of tourism
- Mat-Su CVB has great corporate support



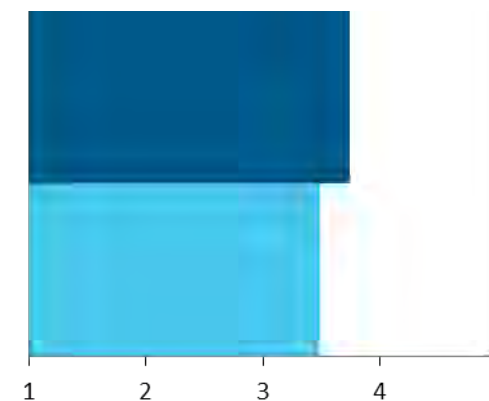
Effective Advocacy Program

- Local government is supportive of DMO programs and the tourism industry
- Local government relies on DMO for input on destination management
- Advocacy program is successful in educating government



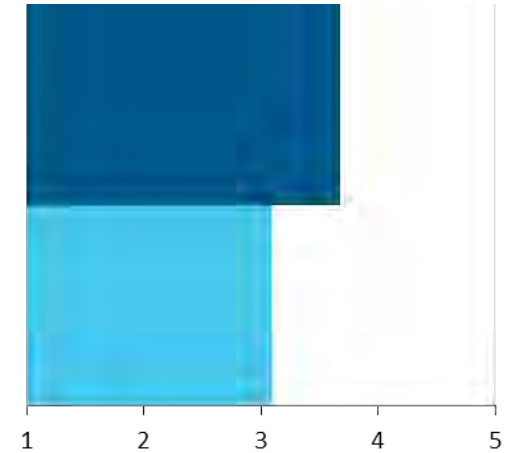
Membership Strength & Support

- Businesses benefit from being a partner
- Mat-Su CVB's partners are active, engaged and supportive



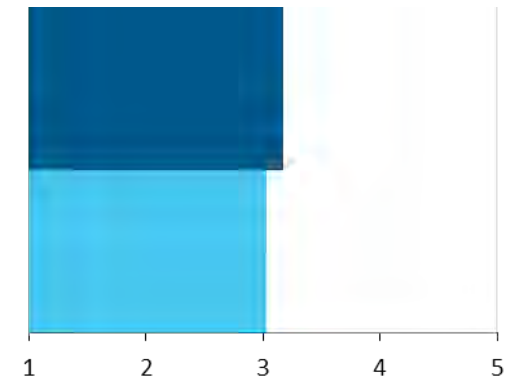
Industry Support

- Mat-Su CVB is seen as a leader in the state and regional tourism industry
- Industry leaders/stakeholders are supportive of Visit Anchorage



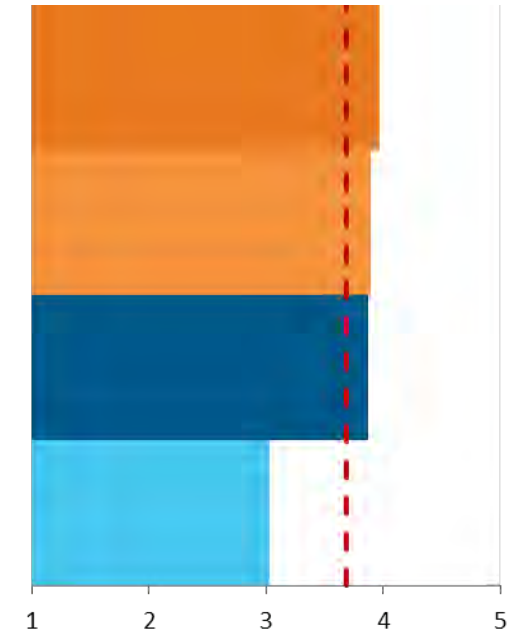
Workforce

- Workforce is stable and has a positive labor relations environment
- Hospitality industry is able to attract and retain a high-quality workforce



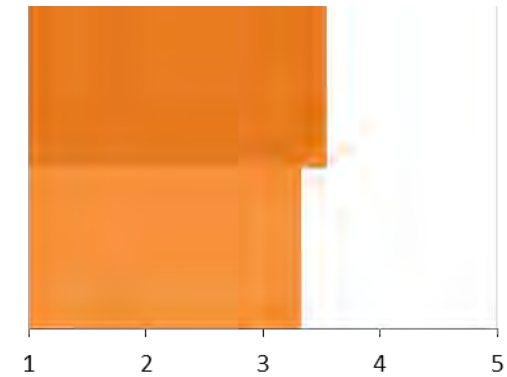
Economic Development

- DMO has a good working relationship with local chambers
- Tourism industry is vital in our community's economic strategies
- Tourism and the meetings industry are identified as key economic drivers
- Tourism master plan for MSB



Effective DMO Governance Model

- Mat-Su CVB has an effective governance structure
- Local leaders are engaged in Visit Anchorage's governance structure



Key Takeaways

- Stakeholders somewhat aligned on perceptions about destination
- Currently in the Explorers quadrant with overall scores below average destination strength and slightly below average community support & engagement



Destination Opportunities

- Attractions & Entertainment
- Convention & Meeting Facilities
- Accommodations
- Mobility & Access
- Being known as a:
 - Environmentally conscious and sustainable destination
 - High-tech, innovative city
 - International tourism destination
- Diverse event facilities
- Sports & Recreation Facilities



Community Support & Engagement Opportunities

- Local Community Support
- Collaboration among tourism partners
- Industry leaders/stakeholders support
- Hospitality Culture
- Workforce
- Tourism master plan for MSB
- Local leaders need to be engaged
- Stable revenue sources for DMO

In your opinion, what one thing could MSB do to become a better or world-class visitor destination?

Attractions (31%)

- Develop some sort of "must-do" attraction. A gondola up Pioneer Peak would be an example of "must-do." Not likely to happen, just an example. Access from the south into Denali could provide a new must-do tour opportunity, but that is well outside the core MSB (Palmer/Wasilla)
- Invest in tourism infrastructure as it relates to visitors accessing our numerous unique outdoor experiences. We are a pass-through region, but if visitors know what we offer and we provide adequate access, they may stay to explore.

Accommodations (19%)

- We need to have a first class meeting and hotel space. We could capture so much more business with these added to our tourism mix.
- Build more large capacity hotels.
- More above average accommodations that will work with travel trade.
- Further develop lodging and activity options in the Hatcher's Pass region. Make Knik River Valley and Hatcher's Pass into a world class adventure base which will attract partner infrastructure such as lodging, activities and restaurants.

Marketing (13%)

- Entire MSB as a destination rather than focus on the Denali region.
- Get more involved in online marketing and media, everything is going mobile.

Mobility & Access (13%)

- More/better local transportation opportunities (bus, shuttles, taxi services). Currently the vast majority of the MSB is only accessible with SELFDRIVE itineraries.

What are the biggest opportunities for us to expand our tourism industry?

Attractions (36%)

- Adventure Travel! MSB offers a variety of natural and man-made venues to recreate. Trail systems, local tour offerings, equipment rental and guide services (including park staffing) is key.
- Expand offerings, venues, promotion in areas beyond Denali; develop infrastructure which brings travelers and locals together
- Culture, Heritage and Arts tourism opportunity expansion.

Accommodations (24%)

- Adding more hotel rooms will help bring more people.
- Encourage additional lodging in Talkeetna - mid market priced.
- Build up large hotels and convention/meeting space
- More hotels and B&Bs in diverse locations, convention attractions

Marketing (24%)

- Highlighting the Glen Highway/Matanuska Glacier area as well as involving the local Native Alaskan tribal councils to provide an authentic Native Alaskan village experience.

Conventions/ Meetings (24%)

- Meetings if we get more/appropriate sized lodging/meeting space

Are there any markets we are currently not capitalizing on?

- Adventure Travel! Agricultural tourism.
- Agriculture and local foods
- Almost all of the non-core areas
- Conferences and destination gatherings of small to medium size
- could do more with sports, honeymoons, aurora watching, adventure travel, family travel, family reunions
- 'Crossover' travelers who may take land extensions post/pre cruise; local groups looking for retreat/meeting venues; weddings;
- Cultural travelers
- Eco-tourism, winter activities.
- I think MSB does a great job on reaching a wide variety of people.
- Large hotels with convention space for business meetings
- More online marketing, social media I know that we do some already but I feel like we should invest more money and time into these areas
- Non-cruise ship, non-RV travelers
- Small meeting, retreats and conventions. Palmer is especially well located for this; a walkable community with shops and restaurants, plus decent meeting space in the new Borough Assembly chambers, borough gym and depot.
- Steering Rubber tire traffic to our attractions.
- Student travel, Anchorage locals - day trips & overnights
- The lack of an adequate facility makes it hard to capitalize on the meetings and conventions market.
- Tribal culture and heritage High-quality shopping Conventions/ large meetings weddings
- Without year round full-service hotels it is difficult to go after meetings and high school sporting events
- You attend international conventions, but there is no relation to more visitors coming to our area from those convention locations. We never receive leads from those conventions to contact interested parties.

What are the biggest challenges we must address to improve our destination?

Funding (23%)

- Funding through taxation -- if we want to improve the MSB as a destination, we need to spread the tax burden to all businesses, not just "bed tax" businesses.
- More beds/hotels to increase bed tax funding. Lack of state park funding to keep our hiking and skiing trails world class.
- Need a central tourist district within Wasilla and Palmer. Need more audits/accountability in bed tax collection.

Accommodations & Meeting Space (19%)

- Limited hotel infrastructure, limited dining opportunities. North MSB is a necessary relief valve to Denali Park access.
- Quality hotels, better road signage and an overall Disney culture that welcomes guests and makes them want to stay & play in the Mat-Su not just drive through to Denali.
- Accommodation options
Meeting/convention spaces built

Regional Collaboration (15%)

- Cooperation between businesses and thinking outside the box for partnerships. Everyone matters in tourism in the valley, not just Denali, Talkeetna and Palmer. There is a lot more to the valley than those areas. And support your members.
- Bringing larger Corporate members together with smaller local MSCVB members to forge new projects

Mat-Su Borough's main icon image is?

- Denali x 9
- Mountains X 6
- Yahoo X 4
- Farms x 2
- Outdoor recreation and cultural attractions
- Pioneer Peak
- Wilderness/rural/small town/nature/glaciers/animals
- Adventure, Fun, Center of activity
- Blue tarps

Breakout Groups

Key Questions

- 1) What are the **three most significant issues** facing Mat-Su during the next three years?
- 2) What is the **single most important action** which should be taken by the Mat-Su Valley CVB in the next year?

Thank You!

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