

2017 UNESCO Creative Cities of Crafts & Folk Art Annual Meeting

Paducah, Kentucky
September 25, 2017

Who we are...

Destinations International is the trade association with members from official destinations organizations of every size, including convention and visitor bureaus, regional tourism boards, state tourism offices and provincial tourism offices and national tourism boards.

DESTINATION
NEXT

Futures Study Research

Process

PHASE 1 Trends Analysis



Objective

Completed comprehensive review of major trends and finalized survey

Tasks

- a) Completed a detailed literature review of key trends affecting the tourism and meetings industry as well as destination organizations
- b) Established 4 global expert advisory panels to interview for additional insight
- c) Developed list of 75 key trends and 55 strategies to assess

PHASE 2 Survey & Future Map



Objective

Administered global survey and produced new Future Map

Tasks

- a) Distributed survey to Destinations International members along with several other mailing lists (e.g. ECM, DMAC, COCAL, AMDEM, AACB, and ICCA)
- b) Completed extensive analysis of results
- c) Prepared new future map identifying key opportunities within control of our industry

PHASE 3 Report & Presentation



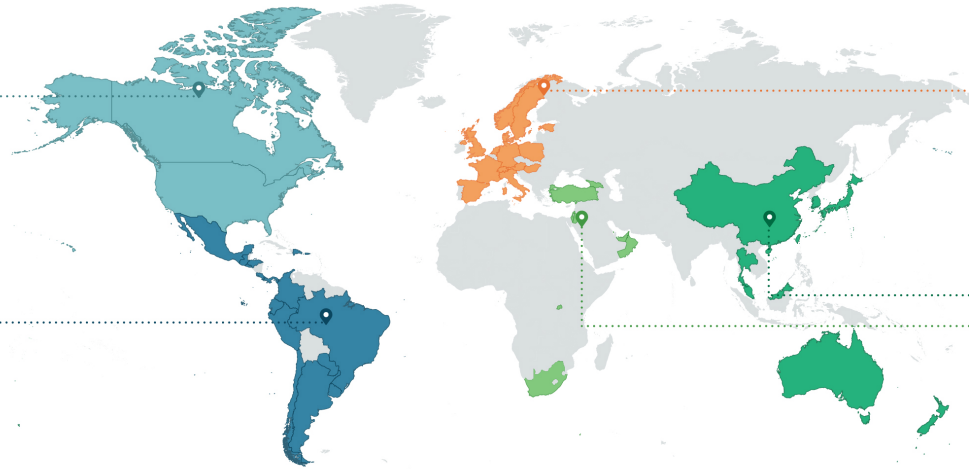
Objective

Prepared report for distribution & presentation deck

Tasks

- a) Considered implications of new results on Scenario Model
- b) Prepared report on key findings
- c) Prepared presentation materials

Survey Participants



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 & STRATEGIS

Trends & Strategies

12

New Trends

10

New Strategies

Top Themes



- Security is emerging as a destination necessity.
- Business events are shifting to be regarded as agents of long-term economic development for communities through building knowledge and advancing investment.
- Travelers are seeking deeper and more transformative experiences
- Sustainable tourism is a trend that is being talked about by the communities we represent

Top 25 trends

Rank	Trend	Change in Rank*
1	Social media's prominence in reaching the travel market (e.g. Facebook, Pinterest, Twitter, Weibo).	-
2	Content creation and dissemination by the public across all platforms drives the destination brand and experience.	New
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.	New
5	Mobile platforms and apps becoming the primary engagement platform for travelers.	↓ -3
6	Video becomes the new currency of destination marketing and story-telling.	New
7	Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations.	New
8	Smart technology (e.g. phones, bag tags and cards) creating new opportunities for innovative new services and processes.	↓ -4
9	Technology enabling faster decision-making by customers.	-
10	Geotargeting and localization becoming more prevalent.	↓ -4

Top 25 trends

- 11 Organizations developing strategic alliances in order to leverage resources. ↑+19
- 12 Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector. ↑+2
- 13 Customers increasingly expect highly curated and customized destination content from destination organizations. New
- 14 The brand of a destination becoming a more important factor in travel decisions to consumers. ↓-1
- 15 Customers increasingly looking to experience a local's way of life. ↓-7
- 16 Air access to a destination is a key challenge in attracting business travelers and meeting planners. New
- 17 Travelers demanding more information, control, interaction, and personalization. ↓-12
- 18 Hotel taxes increasingly vulnerable to alternative politically based projects. ↓-7
- 19 Business events provide their delegates with more authentic, local experiences. New
- 20 The industry is moving from e-commerce through to m(mobile)-commerce and ultimately to V(video)-commerce in its communications and transactions with travel consumers. New

Top 25 trends

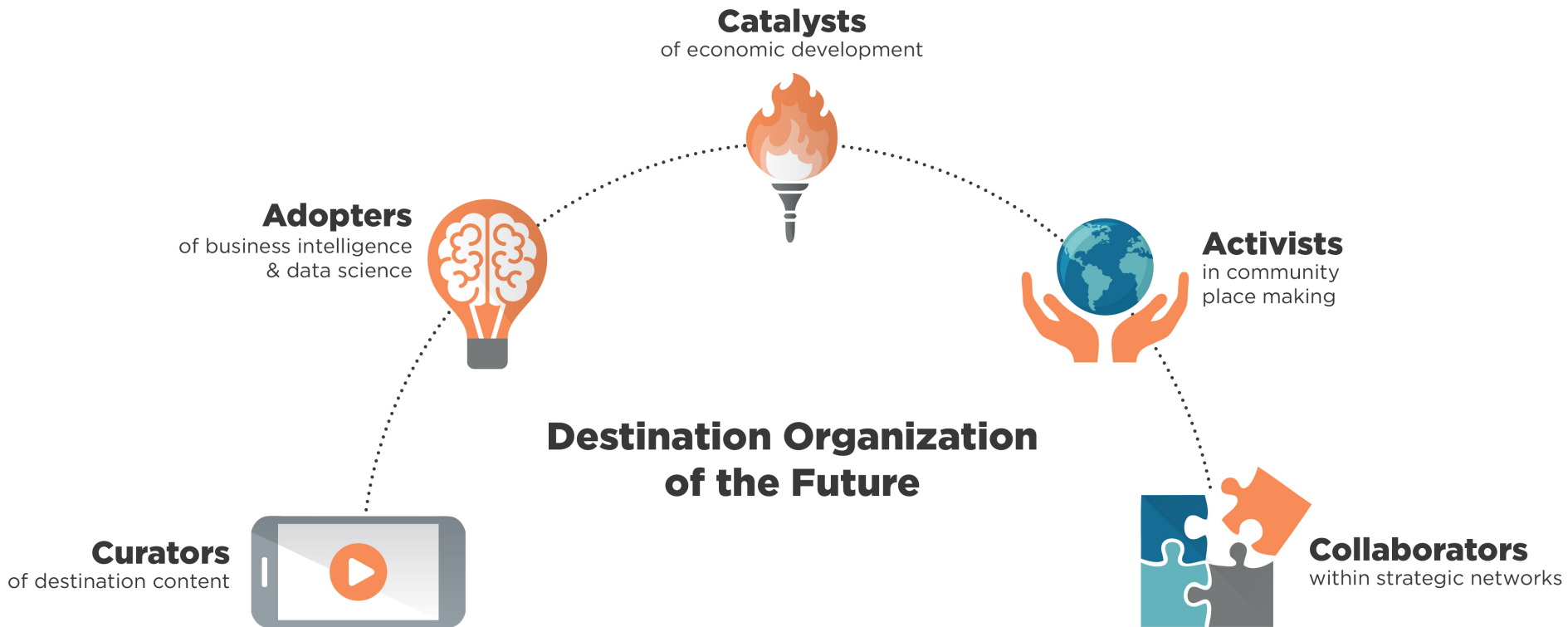
- ★ **21** Brand identity for destinations becoming more critical in terms of meeting planner perceptions about value and experience. ↓-14
- ★ **22** Disruption, in the form of changing business models, terrorism, pandemics, or natural disasters, will increasingly impact how destinations think and act. New
- ★ **23** Technology makes travel products and services more transparent to the customer. New
- ★ **24** Communities more engaged in the development and management of the destination experience. New
- ★ **25** Talent attraction becoming a joint effort of tourism and other economic sectors within communities. New

Top Strategies

Rank	Strategy	Change in Rank*
1	My organization will invest more effort and resources into video content to market the destination.	New
2	My organization will focus significant attention to content creation and dissemination strategies.	New
3	My destination will focus on developing authentic experiences for the customer.	New
4	My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.	New
5	My organization will play more of a central role in advocacy in my destination.	↓ -2
6	My organization will enhance our engagement with the local community to manage future tourism considerations.	New
7	My destination will develop strategies to protect what we have while attracting events and visitation to our community.	New
8	My organization will design digital customer engagement primarily around mobile platforms.	↑ +2
9	My organization will place greater emphasis on engaging with customers in two-way conversations.	↓ -7
10	My organization will be more involved in broader economic development projects and initiatives.	↓ -6

The Role of Destination Organizations & CVBs

Re-engineering the Destination Organization

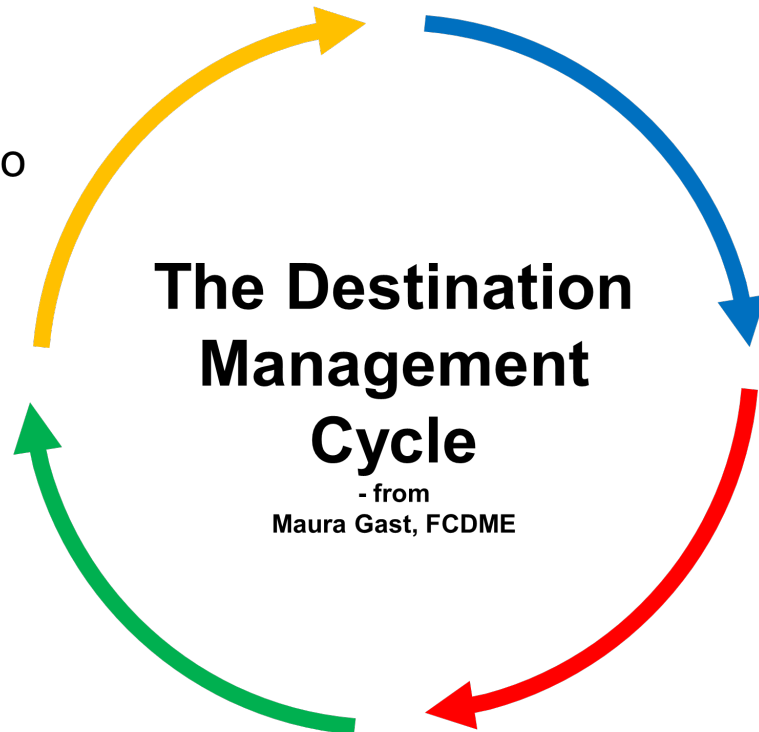


The Role of Destination Organizations & CVBs

The role of destination organizations is changing rapidly

If you build a place people want to visit, you build a place where people want to live.

And if you build a place where business has to be, you'll build a place where people have to visit.



If you build a place where people want to live, you'll build a place where people want to work.

If you build a place where people want to work, you'll build a place where business needs to be.