



Discover Saint John

Strategic Plan 2020-2022

December 10, 2019

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SVP Innovation

MM
GY NextFactor



Today:

1. Overview of DestinationNEXT 2019

- Major trends in the global visitor economy
- Key strategies for destination organizations

2. Overview of 3-Year Strategic Plan

- DestinationNEXT assessment results
- Overall destination strength & community alignment
- Strategic goals & initiatives for Saint John

DESTINATION NEXT

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

DestinationNEXT Futures Study

- Based on global survey of 500+ destination leaders
- Key trends and strategies for destination organizations
- Updated in 2014, 2017 & 2019



DestinationNEXT Scenario Model

- Measures destination strength & community alignment
- 230+ assessments globally



4 Advisory Panels



**Industry
Disruptors**

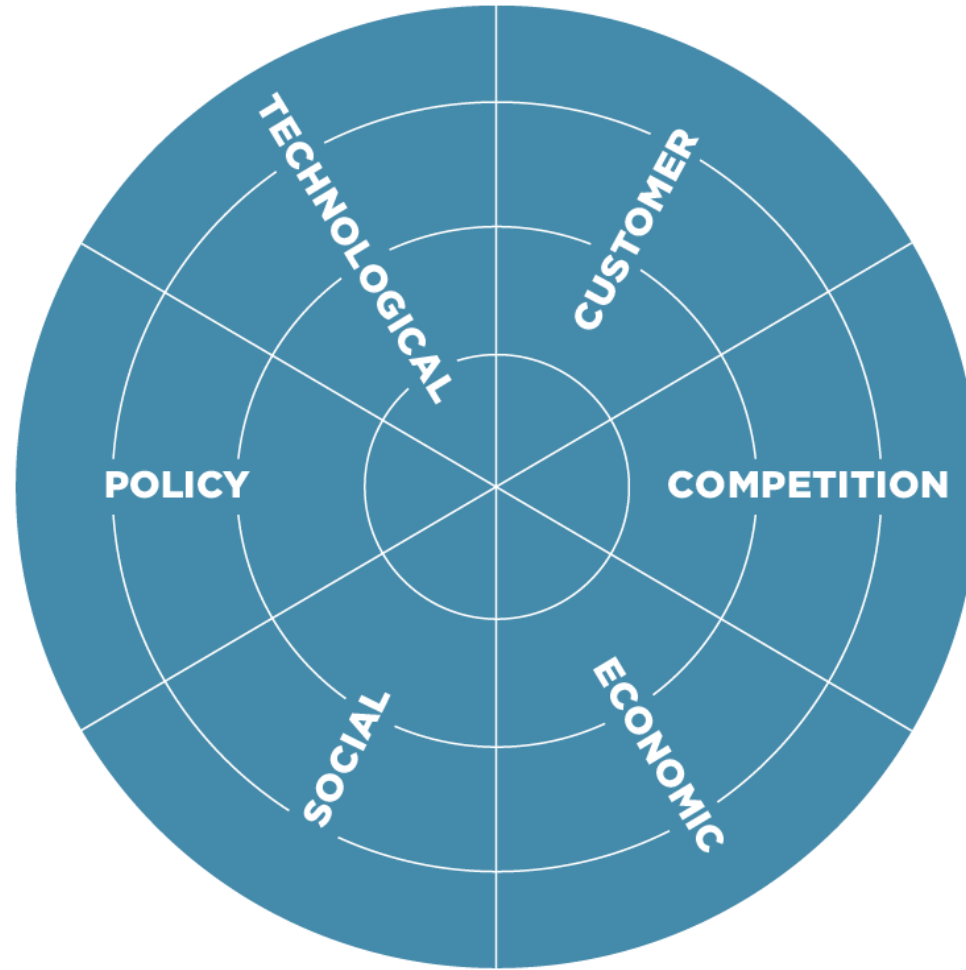
**Industry
Clients**

**Community
Leaders**

**Destination
Leaders**

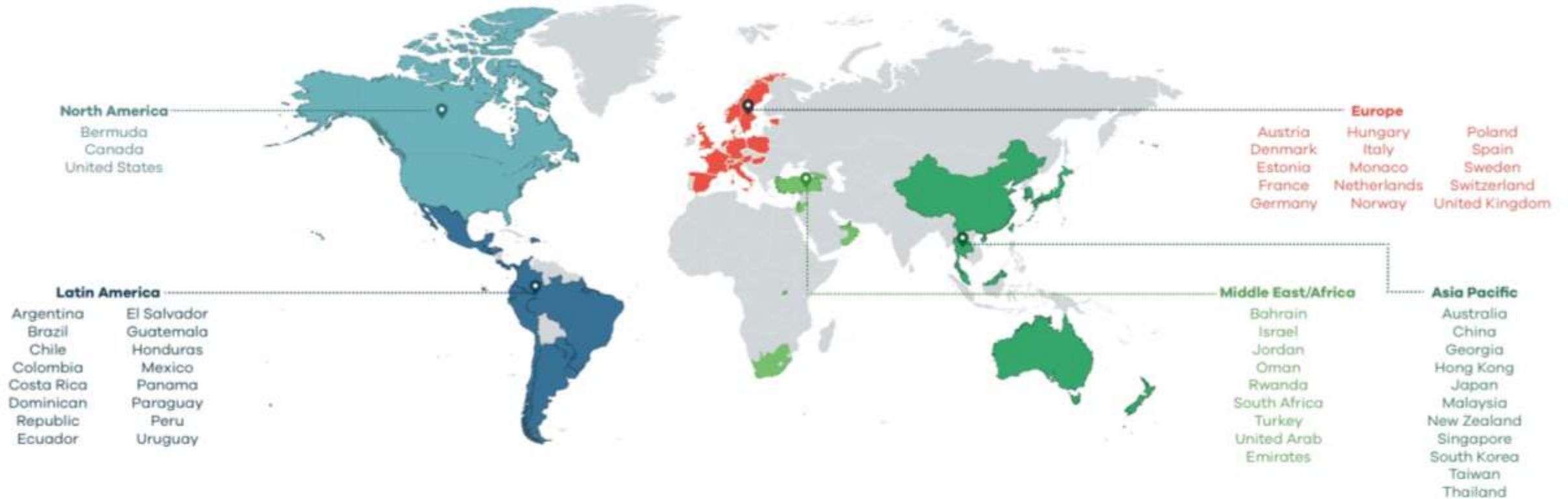
Strategic Radar Map

52
52
Trends



64
64
Strategies

Global Scope



521

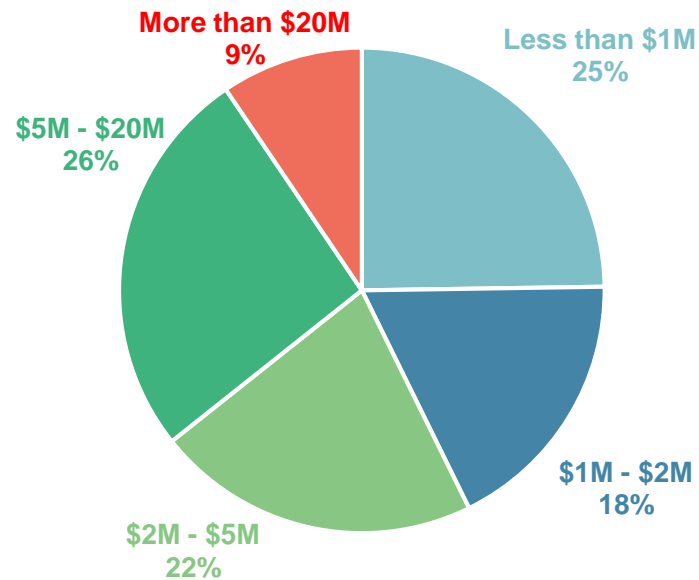
Participants

55

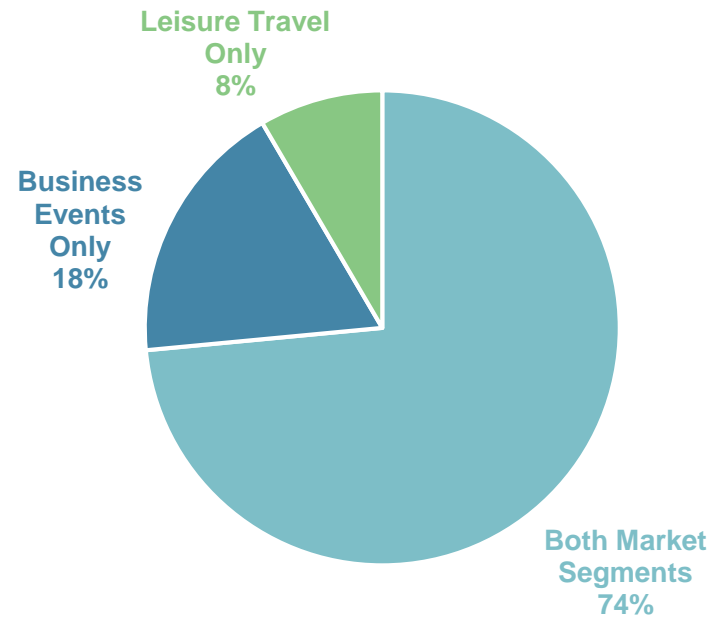
Countries

Diverse Organizations

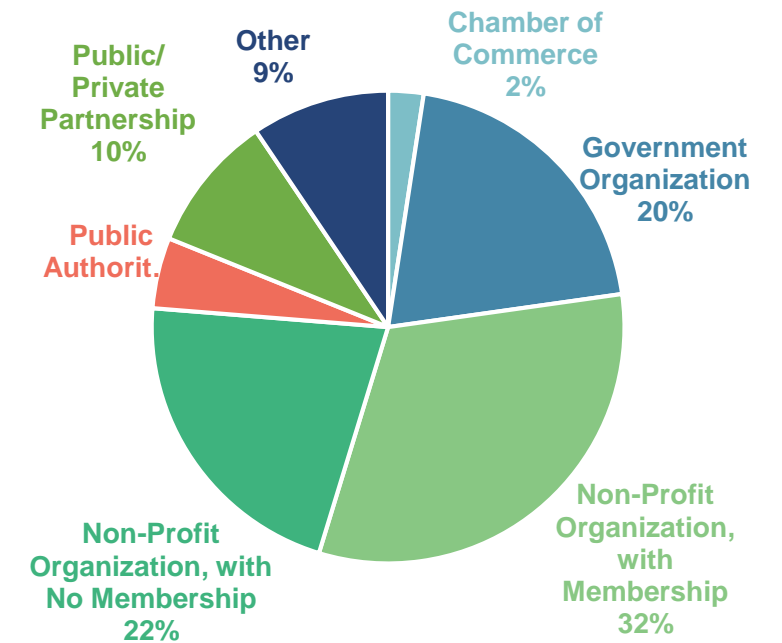
Budget Size



Market Segment



Business Model





Top 20 Trends in 2019

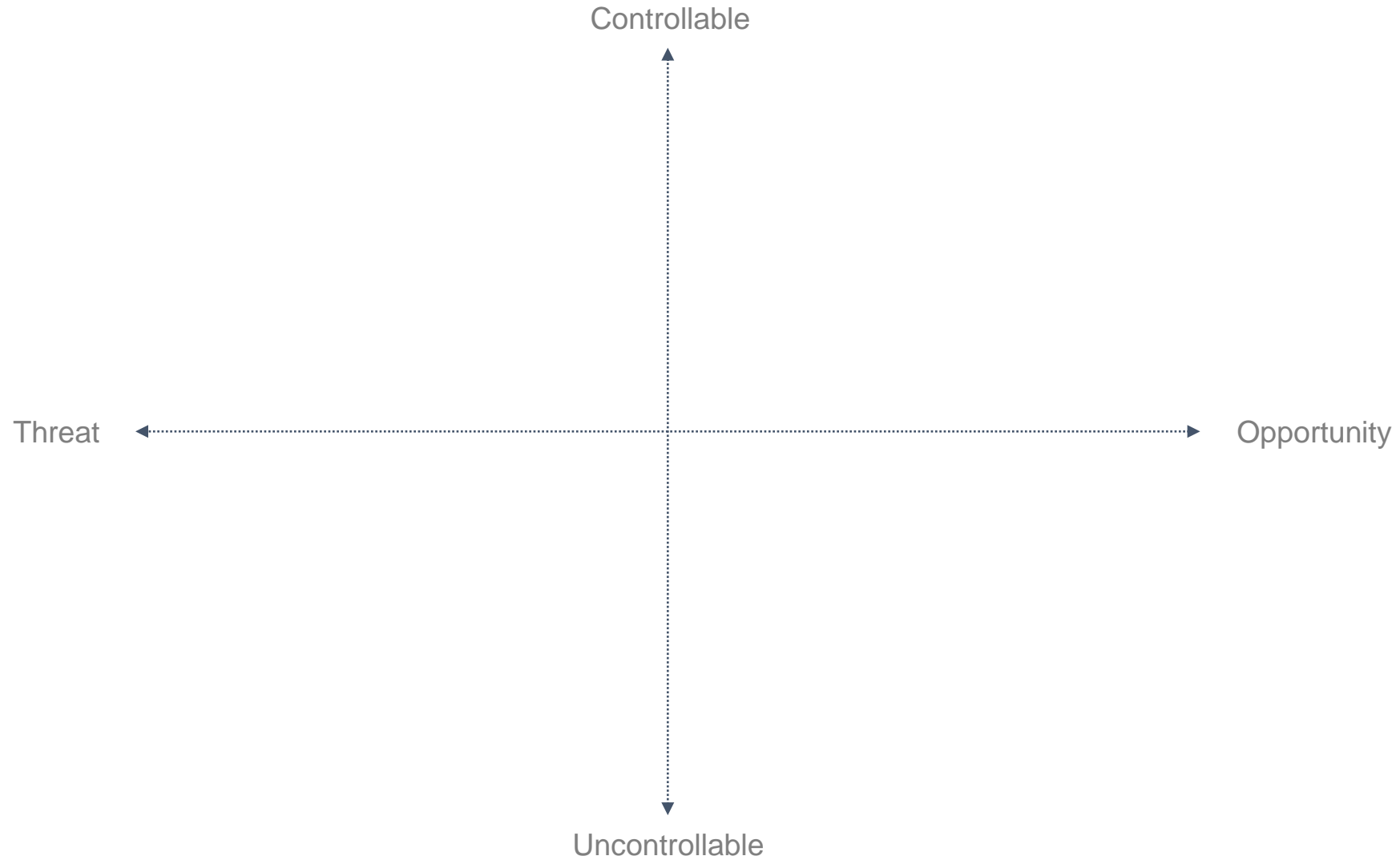
Top 20 Trends in 2019

2▲	1. Customers increasingly seeking a unique, authentic travel experience.
0	2. Content creation and dissemination by the public across all platforms drives the destination brand and experience.
2▼	3. Social media's increasing prominence in reaching the travel market.
2▼	4. Video becomes the new currency of destination marketing and storytelling.
2▲	5. Harvesting data and developing business analytics differentiate successful tourism destinations.
1▼	6. Mobile platforms and apps becoming the primary engagement platform for travelers.
10▲	7. Travelers demanding more information, control, interaction and personalized information.
5▲	8. Customers increasingly expect highly curated and customized destination content.
1▼	9. Smart technology creating new opportunities for innovative new services and processes.
0	10. Geotargeting and localization becoming more prevalent.
13▲	11. Communities more engaged in the development and management of the destination experience.
39▲	12. Increasing importance of transparency and building partnerships to secure business to a destination.
2▼	13. Organizations are increasingly developing strategic alliances across multiple economic sectors in order to leverage resources.
NEW	14. More communities and municipal governments are aware of importance of tourism to local economy.
1▲	15. Air access to a destination is a key factor in attracting business.
NEW	16. People are seeking more personal enrichment in their travels, including wellness and well-being.
NEW	17. Destinations looking at sustainability more broadly, encompassing economic, social and environmental impacts.
23▲	18. More third-party information providers aggregating content about destinations.
10▲	19. Peer-to-peer buyer influence driving customer purchases.
6▼	20. The brand of a destination becoming a more important factor for destination decisions.

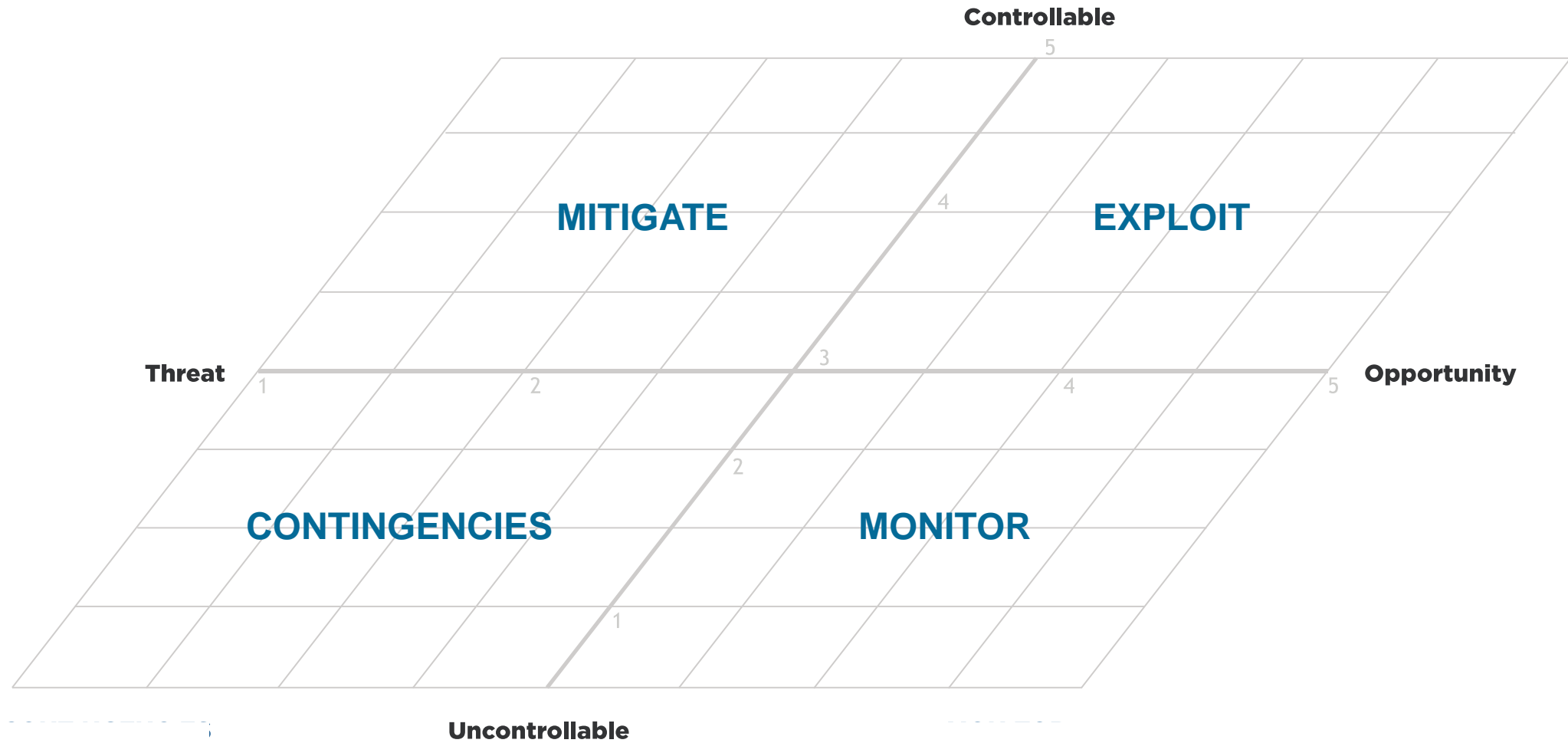
Top Trend Movers in 2019

- | | |
|-----|--|
| 10▲ | 7. Travelers demanding more information, control, interaction and personalized information. |
| 13▲ | 11. Communities more engaged in the development and management of the destination experience. |
| 39▲ | 12. Increasing importance of transparency and building partnerships to secure business to a destination. |
| NEW | 14. More communities and municipal governments are aware of importance of tourism to local economy. |
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| 23▲ | 18. More third-party information providers aggregating content about destinations. |
| 10▲ | 19. Peer-to-peer buyer influence driving customer purchases. |

Future Map



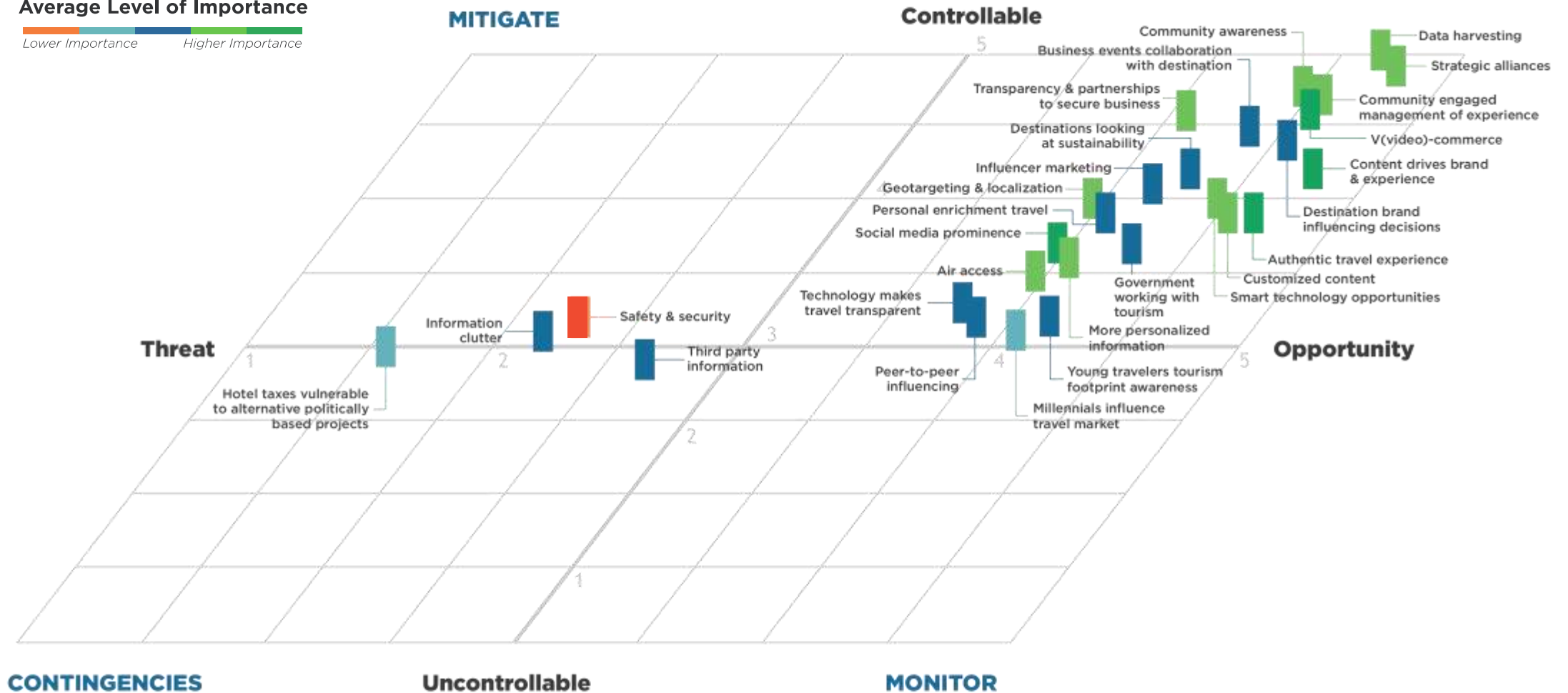
Future Map



Future Map

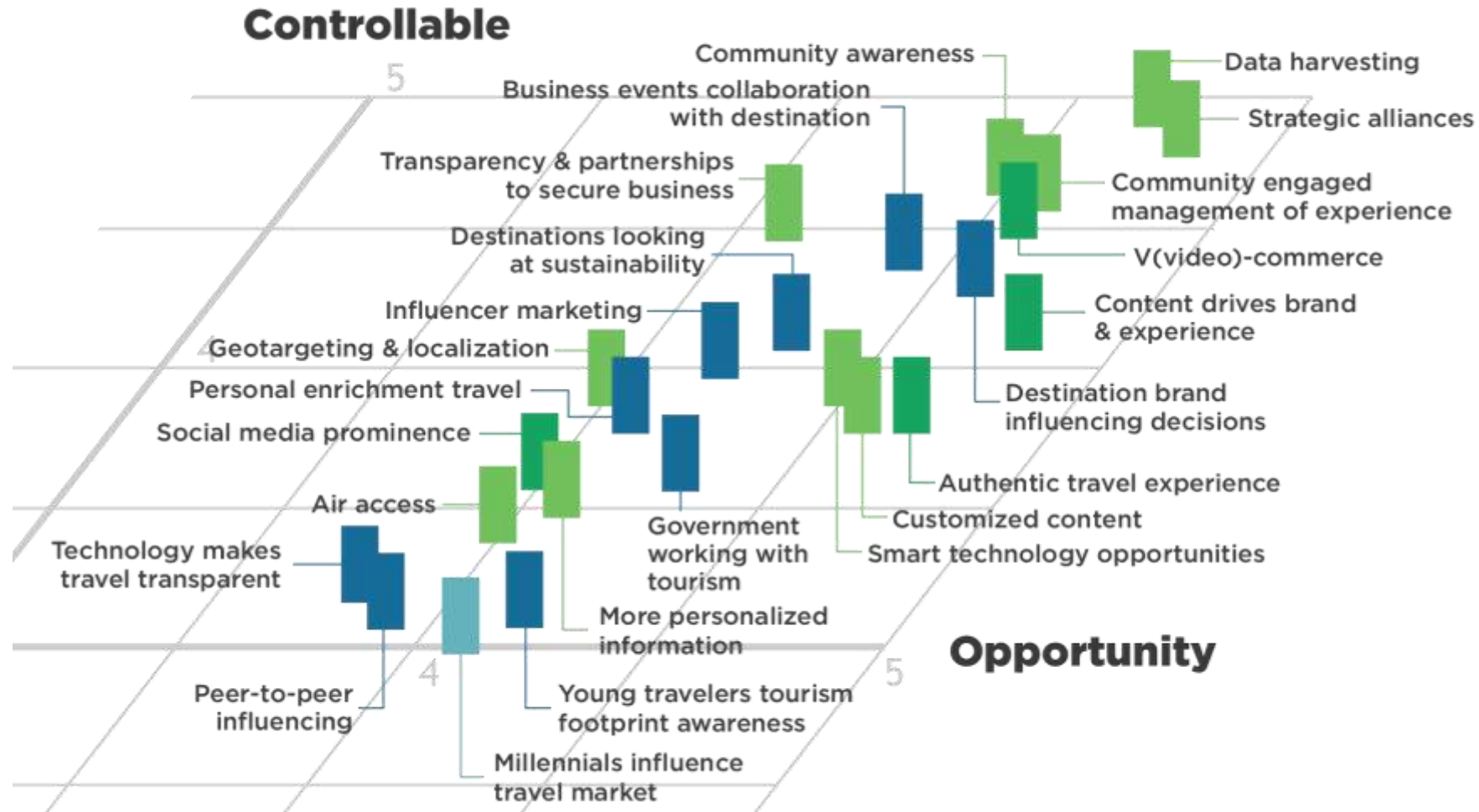
Average Level of Importance

Lower Importance Higher Importance



Future Map

EXPLOIT





Top 20 Strategies in 2019

Top 20 Strategies in 2019

5▲	1. My destination organization will enhance engagement with the local community to manage future tourism development.
3▲	2. My destination organization will play more of a central role in advocacy in my destination.
1▼	3. My destination organization will focus significant attention to content creation and dissemination strategies.
3▼	4. My destination organization will invest more effort and resources into video content to market the destination.
10▲	5. My destination organization will adopt consistent standards and measures of performance with other organizations.
33▲	6. My destination organization will act as conduit to build social networks among our local business community.
4▼	7. My destination will focus on developing authentic experiences for the customer.
NEW	8. My destination will have a tourism master plan to define long-term destination development direction.
1▼	9. My destination organization will design digital customer engagement primarily around mobile platforms.
2▲	10. The economic impact of tourism and conventions will be better understood in my destination.
NEW	11. My destination will take steps to better integrate tourism, economic development and talent attraction.
19▲	12. My destination organization has a key responsibility to protect our environmental, social and cultural characteristics.
3▲	13. My destination organization will agree to a uniform methodology with other organizations to measure economic impact.
0	14. My destination organization will form more strategic alliances outside the destination organization industry.
8▼	15. My destination will develop strategies to protect what we have while attracting events and visitation to our community.
12▼	16. My destination will connect with customers through all stages of their experience from awareness to post-visit.
11▲	17. My destination organization will balance the need for growth with responsible and sustainable development.
NEW	18. My destination organization will develop outreach programs in our local community to broaden our networks.
NEW	19. My destination organization will leverage our destination's priority industry sectors to generate business.
10▼	20. My destination organization will be more involved in broader economic development projects and initiatives.

Top Strategy Movers in 2019

10▲	5. My destination organization will adopt consistent standards and measures of performance with other organizations
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Three Transformational Opportunities:

#1 Destination Stewardship

Balancing economic development, sustainable tourism and quality of life

#2 Community Alignment

Building public support around a shared vision for the destination

#3 Digital Conversion

Connecting with visitors on mobile devices to drive real-time sales in-destination



1 Destination Stewardship

Thirst for Unique, Authentic, Personalized Experiences



Wynwood Miami

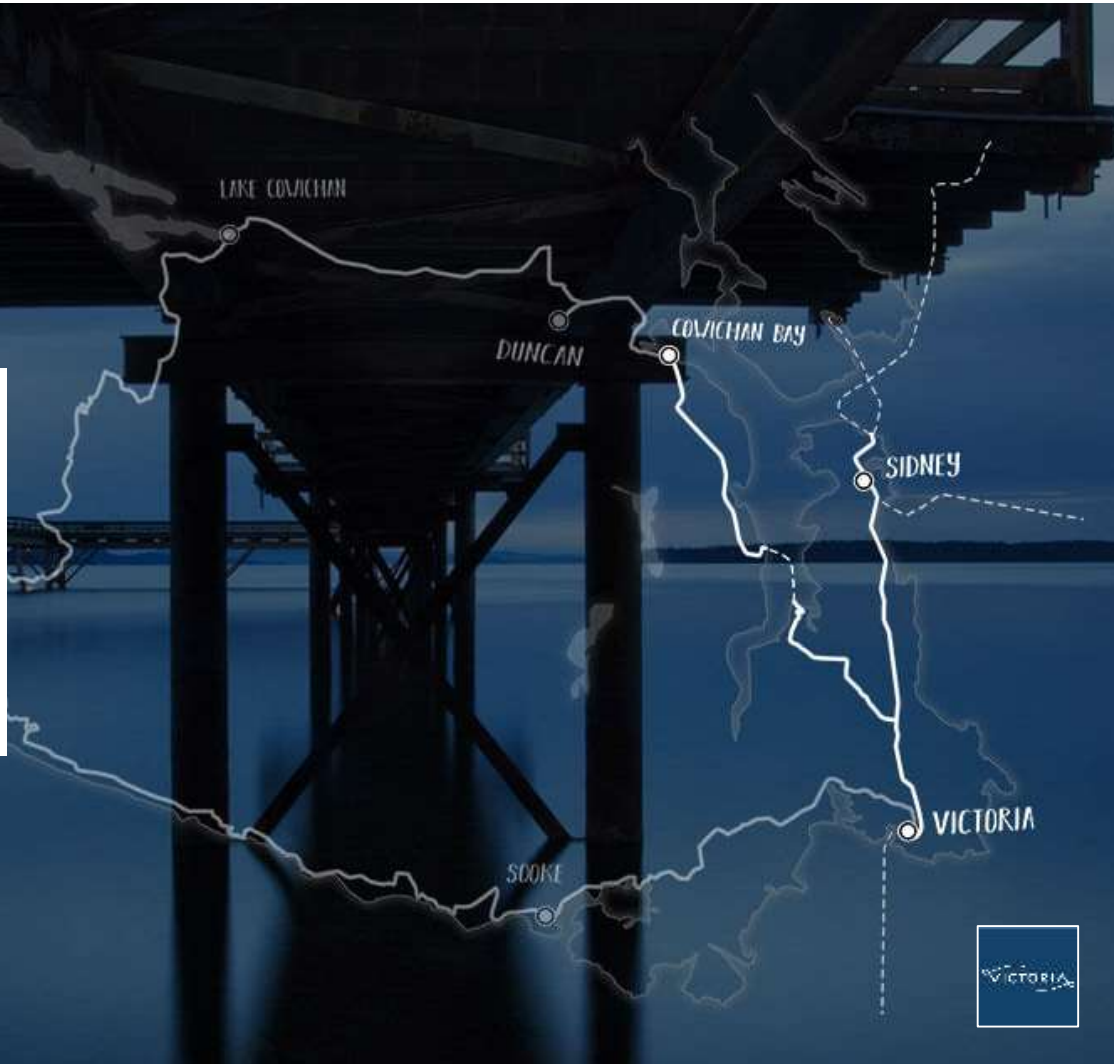
Montreal Illuminations: From Attraction to Experience



The Rise of Integrated Sustainability: Economic, Social + Environmental



The Growth of Visitor Dispersal Strategies



The strategy is easy.
The challenge is
getting buy-in from
the communities.

Tourism Victoria



Destination Madison co-created the “Bucky On Parade” sculpture project, giving \$1 million to local charity and \$400K to the organization.



2

Community Alignment

Every Dutch citizen will benefit from tourism by 2030.

Holland Tourism





Hawaii Tourism Authority's KPIs:

- Visitor Satisfaction
- Resident Sentiment
- Per Person Daily Spend
- Total Visitor Spend

A scenic photograph of a lighthouse on a rocky coastline at sunset. The lighthouse is a tall, white tower with a dark top section and a lantern room. It stands on a dark, rocky outcrop. To the left of the lighthouse is a small, white, rectangular building. The background is filled with a dense forest of evergreen trees. The sky is a dramatic mix of orange, yellow, and dark grey clouds, with the sun low on the horizon. The ocean is visible in the distance, reflecting the colors of the sky. The overall mood is serene and majestic.

Your Saint John.

New Breckenridge Tourism Vision

**A Harmony of Quality of Life for Residents
and Quality of Place for Visitors**





3 Digital Conversion

Every **minute**,
there are:



Digital Engagement

1 million

logging on Facebook

4.5 million

YouTube vids watched

56,000

Instagrams posted



Digital Conversion

1 million

logging on Facebook

4.5 million

YouTube vids watched

56,000

Instagrams posted

1,400

Airbnb bookings

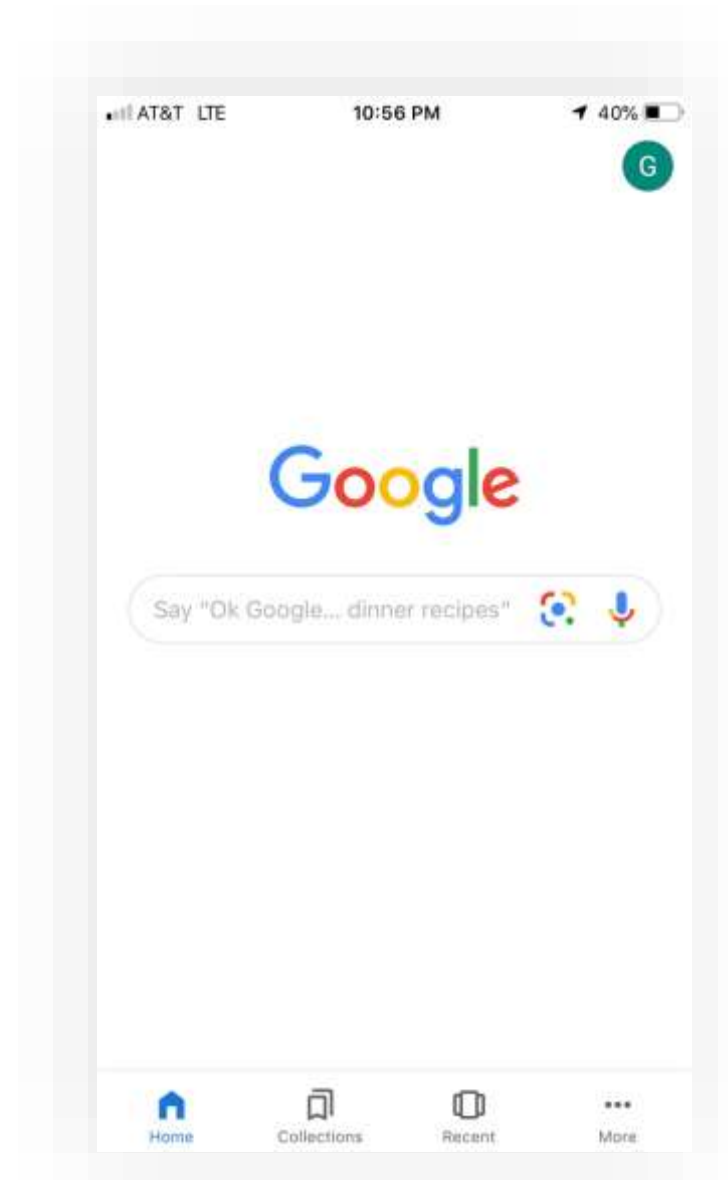
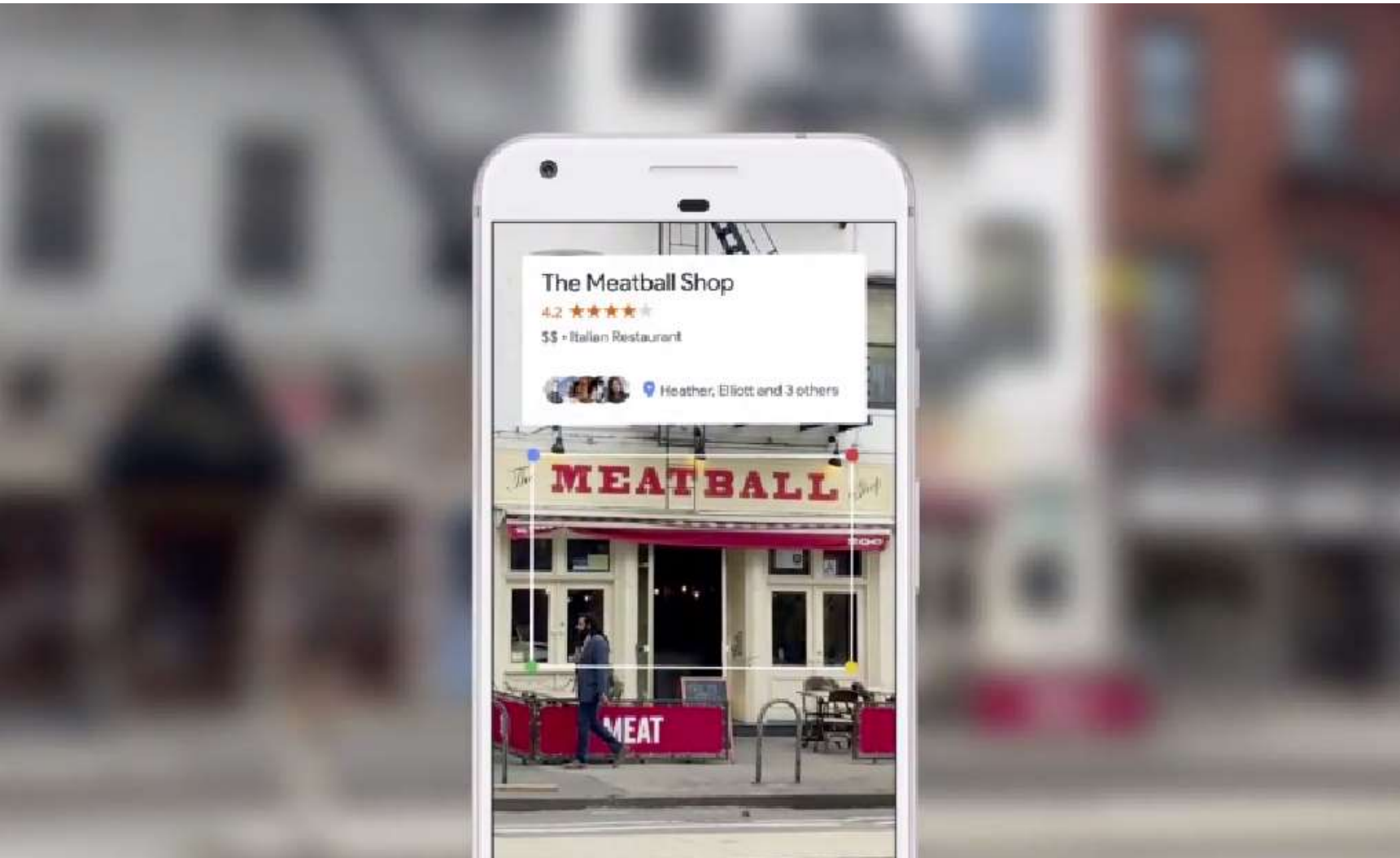
\$21,000

spent on Expedia

9,800

Uber trips

Visual Search and Augmented Reality



Artificial Intelligence-Powered Conversational Commerce

“Rose” at The Cosmopolitan of Las Vegas
is driving 30% higher on-property revenue



MEET
ROSE

In-Destination, On-Demand Mobile Booking



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

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San Francisco, CA

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TripAdvisor Traveler Rating

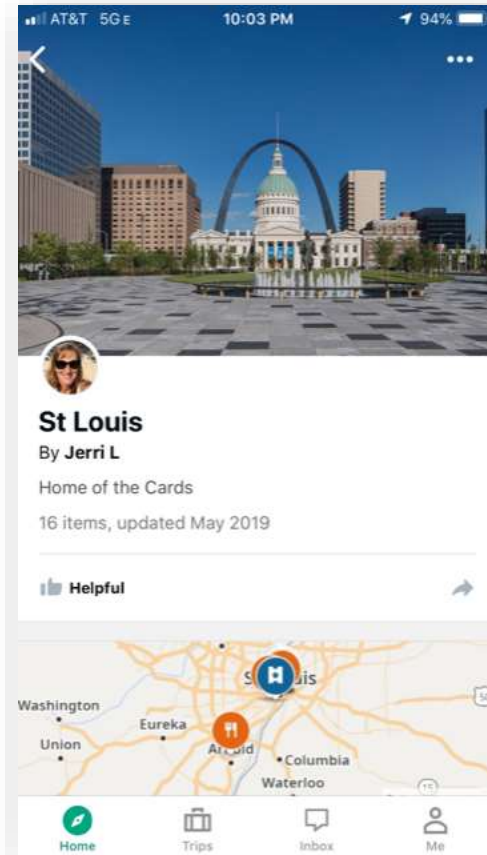
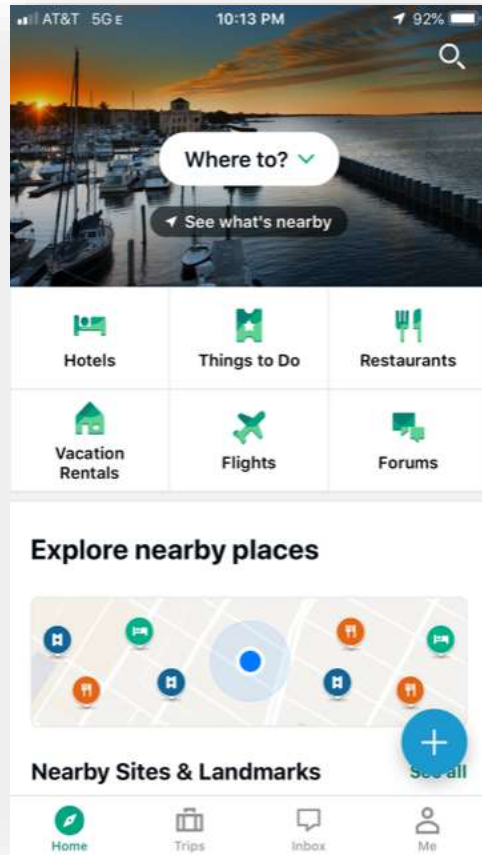
5.0 of 1059 reviews

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

TripAdvisor: From Review Site to Tour Booking Engine







**Destination
Stewardship**

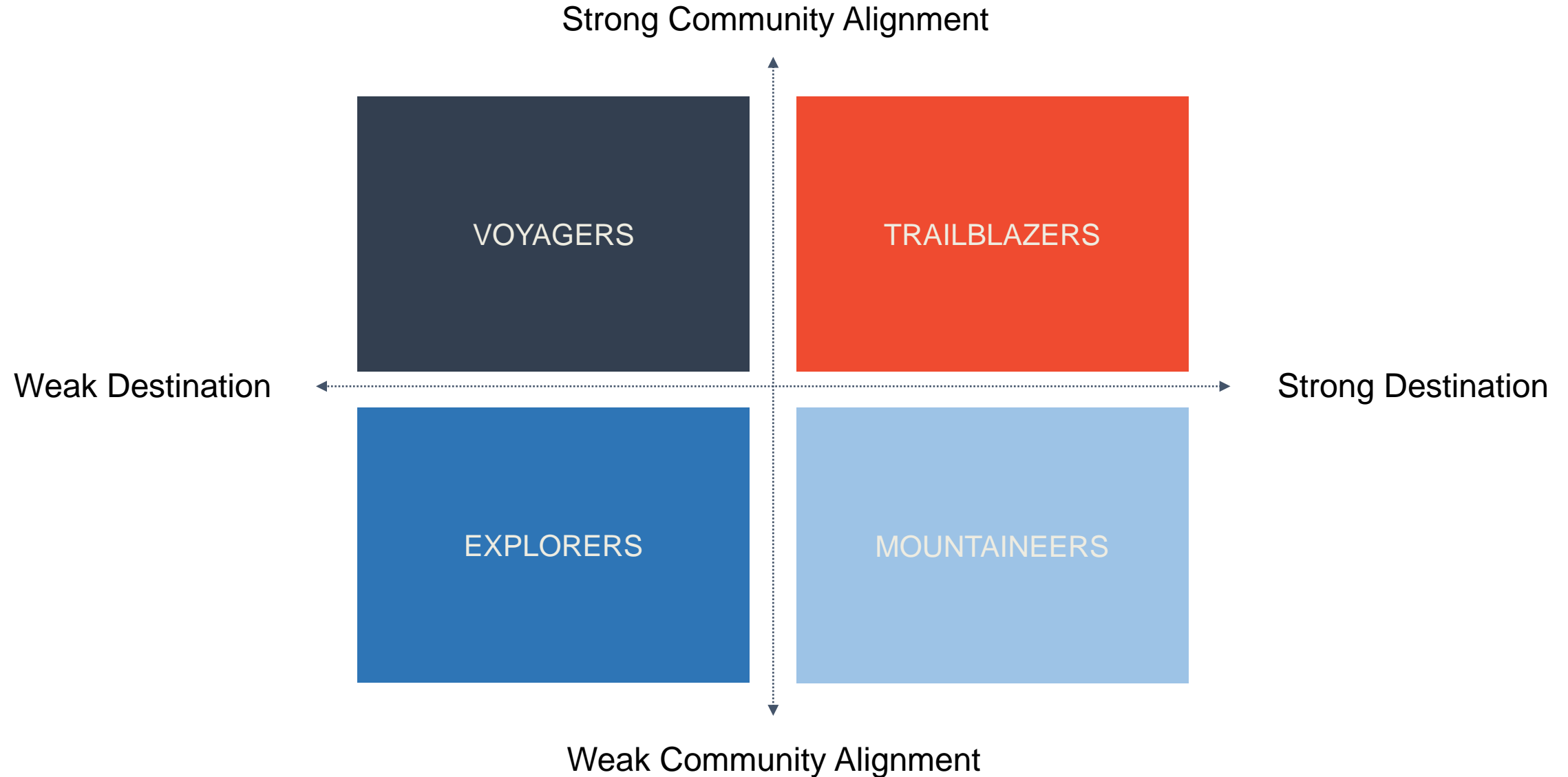
**Community
Alignment**

**Digital
Conversion**

DESTINATION NEXT

**Multi-User Diagnostic Assessment:
Saint John, New Brunswick**

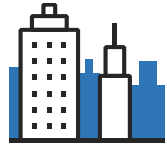
DestinationNEXT Scenario Model



Destination Strength Variables



Brand



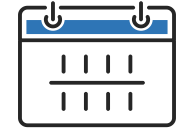
Accommodation



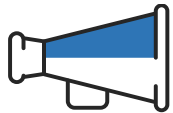
**Attractions &
Entertainment**



**Conventions &
Meeting Facilities**



Events



**Sports & Recreation
Facilities**



**Communication
Infrastructure**



Mobility & Access



Air Access



**International
Readiness**

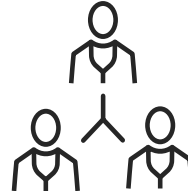
Community Alignment Variables



**Organization
Governance Model**



**Partnership
Strength**



Industry Support



**Local Community
Support**



**Regional
Cooperation**



Workforce



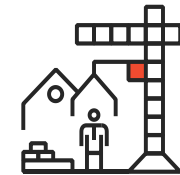
Hospitality Culture



**Policy & Regulatory
Environment**



**Funding Support
& Certainty**



**Economic
Development**

United States



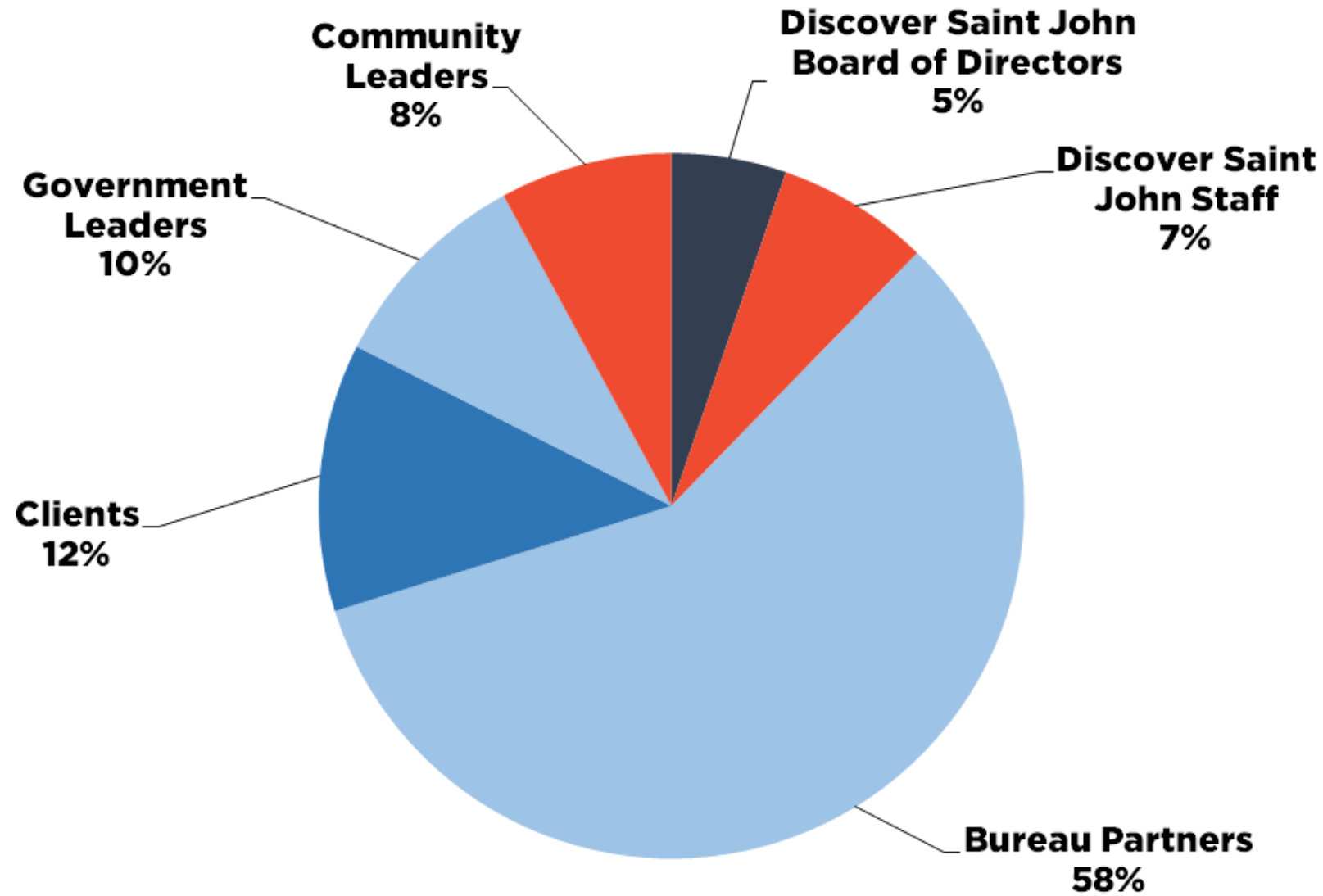
States shaded for state-wide assessment

Canada

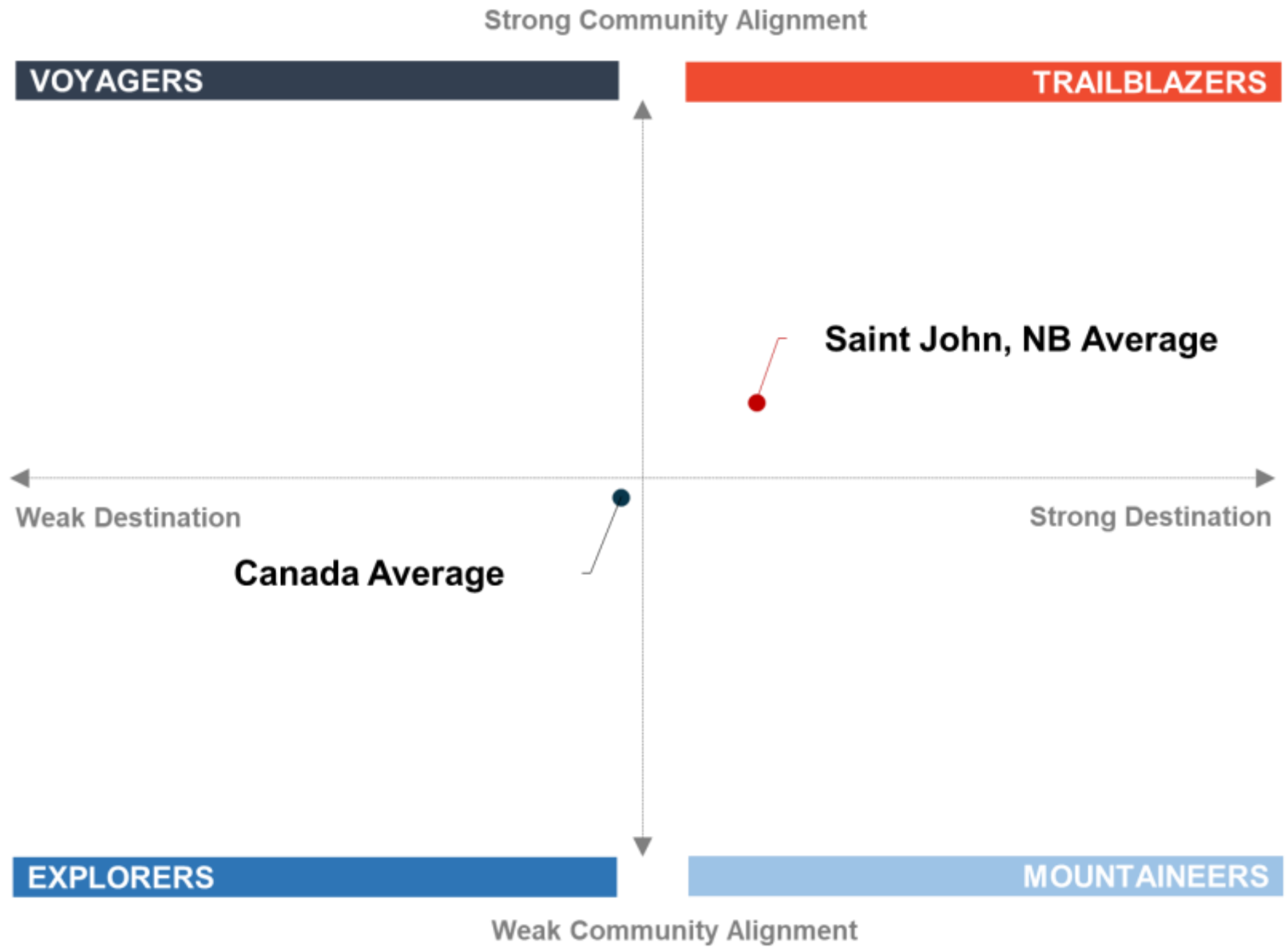


Provinces shaded for province-wide assessment

114 Responses



Overall Assessment



Trailblazers

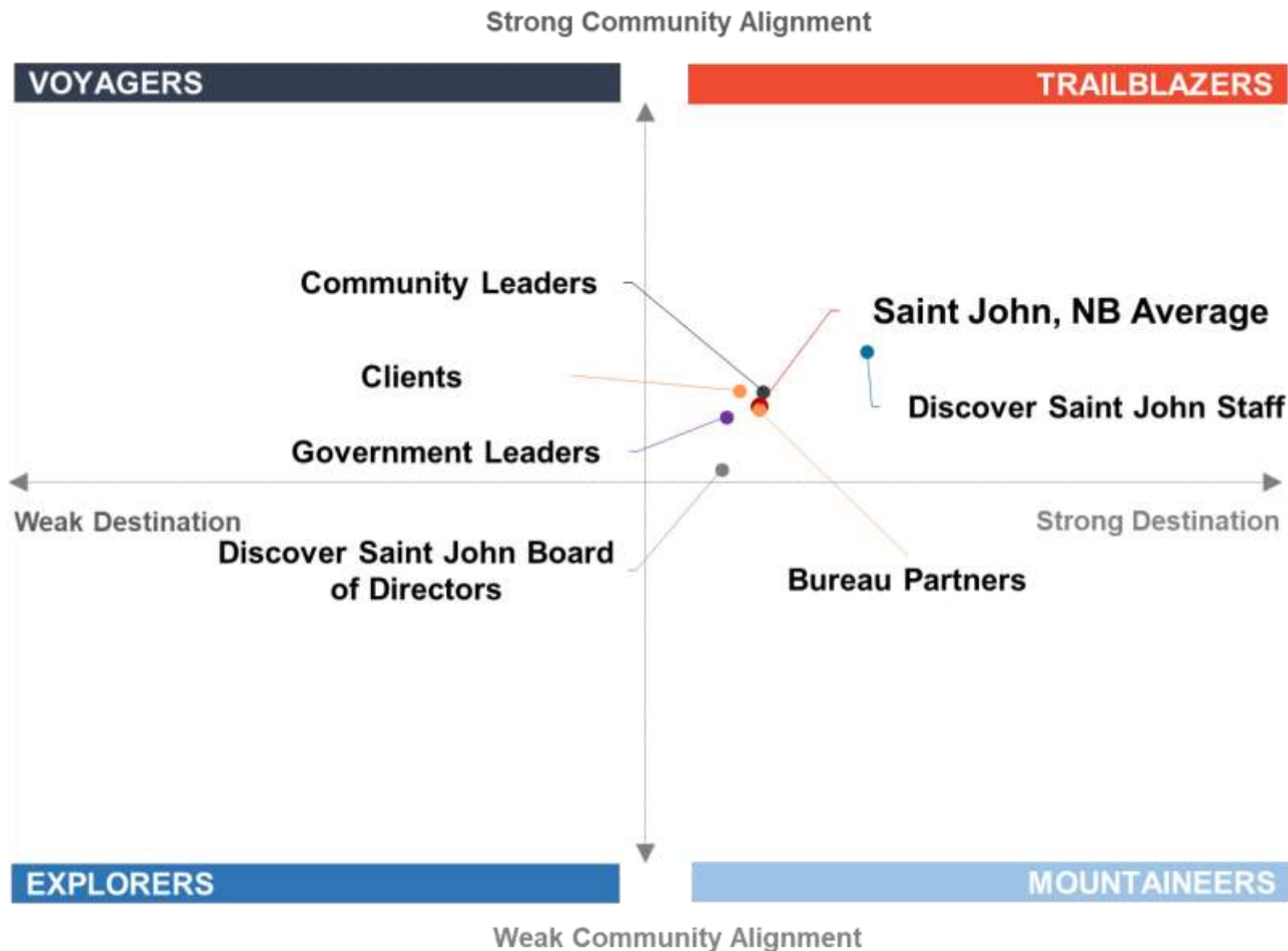
DMO and destination realize the benefits of tourism and work to keep community and marketplace engagement fresh.

Key Strategic Challenges

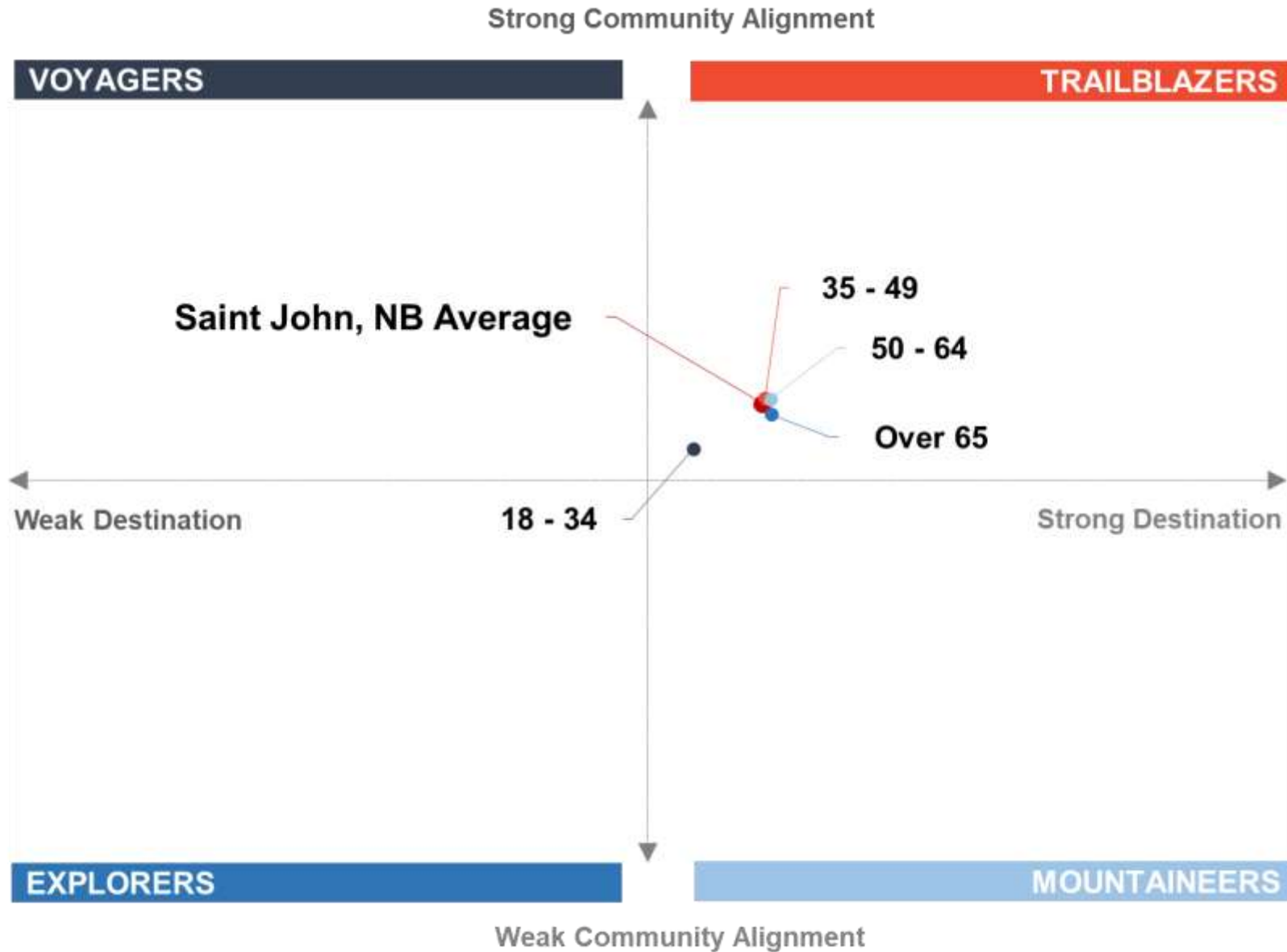
- Avoiding complacency
- Continually delivering a compelling and authentic visitor experience
- Continually collaborating with government & residents to build stronger communities



Stakeholder Groups



Age Groups



Destination Strength – Report Card

Variable	Relative Importance (0-100%)		Perceived Performance (1-5 scale)		
	Industry Average	Saint John, NB Average	Industry Average	Saint John, NB Average	Standard Deviation
Convention & Meeting Facilities	9.8%	10.8%	3.1	3.7	0.5
Attractions & Entertainment	10.8%	10.7%	3.6	3.9	0.5
Events	9.8%	10.3%	3.6	4.1	0.5
Accommodation	10.5%	10.2%	3.5	3.9	0.6
Brand	10.4%	9.8%	3.5	3.9	0.5
International Readiness	10.0%	9.8%	3.7	3.6	0.5
Mobility & Access	10.1%	9.8%	3.0	3.3	0.6
Outdoor Recreation & Sports Facilities	9.5%	9.8%	3.2	3.8	0.5
Air Access	9.1%	9.6%	3.1	3.1	0.6
Communication & Internet Infrastructure	10.0%	9.3%	3.2	3.8	0.6
DESTINATION STRENGTH - Saint John, NB					3.72
INDUSTRY AVERAGE DESTINATION STRENGTH					3.36

Green signifies **overperforming** by greater than 0.2.

Yellow signifies **underperforming** by greater than 0.2.

Red signifies **underperforming** by greater than 0.4.

Community Alignment – Report Card

Variable	Relative Importance (0-100%)		Perceived Performance (1-5 scale)		
	Industry Average	Saint John, NB Average	Industry Average	Saint John, NB Average	Standard Deviation
Hospitality Culture	10.3%	10.3%	3.6	4.2	0.8
Policy & Regulatory Environment	10.1%	10.2%	3.5	3.9	0.6
Funding Support & Certainty	10.1%	10.2%	3.2	2.8	0.6
Local Community Support	10.3%	10.2%	3.5	3.9	0.6
Partnership Strength	9.1%	10.1%	3.5	4.4	0.6
Industry Support	10.0%	10.0%	3.7	4.4	0.6
Organization Governance Model	9.5%	10.0%	3.7	4.3	0.5
Workforce	10.2%	10.0%	3.2	3.4	0.8
Regional Cooperation	10.1%	9.5%	3.6	4.3	0.6
Economic Development	10.3%	9.5%	3.9	4.0	0.5
COMMUNITY ALIGNMENT - Saint John, NB					3.95
INDUSTRY AVERAGE COMMUNITY ALIGNMENT					3.55

Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

Key Takeaways

- **Currently in Trailblazers quadrant with above industry average destination strength and community alignment**
- **Stakeholders are somewhat aligned on perceptions about destination**

Destination Strength - Opportunities for Improvement

- Long-term meeting capacity
- Convention space branding
- Iconic attractions
- Diverse shopping
- Environmentally conscious
- Innovative
- Accommodate diverse languages
- Bikeability
- Accessibility for disabled
- Public transportation
- Camping facilities
- Air Access

Community Alignment - Opportunities for Improvement

- Funding support & revenue
- Residents support
- Workforce
- Tourism master plan

Ideal Future Results

During the board retreat, Discover Saint John’s executive staff and board members ranked the following items in terms of importance from 1-10 to determine the ideal future for Saint John’s visitor economy in the next three years.

Value Ideal Future

10	Preserve and grow our funding
9	Increase partnerships with corporations and government
9	Secure long-term funding for larger event development & bid support
8.8	Align with City priorities
8.3	Grow sales & marketing teams
8.1	Collaborate with community to develop new experiences
8.1	Develop more visitor product with long-term sustainable vision
8.1	Build on existing events and cultural tourism experiences
7.9	Improve resident sentiment and support
7.8	Improve signage and wayfinding, including digital
7.3	Improve in-market visitor purchase strategy
7.2	Improve overall accessibility for visitors
7.1	Develop an overarching green initiative for hospitality sector
7	Increase collaboration with Saint John Transit to improve mobility



Discover Saint John

Strategic Plan 2020-2022



Strategic Plan Elements



Discover Saint John and its board of directors are united in their direction for the future of the city's visitor economy, based on the shared interests of stakeholders, visitors and the local community.

VISION: **Be the must-experience destination
in Atlantic Canada**

MISSION: **Increase tourism revenue to drive economic
vitality and enhance quality of life**

Strategic Goals

To achieve Discover Saint John's vision, there are four new strategic goals for the organization. On the following pages, the specific objectives and targets are listed for each.

- 1. Leading-Edge Sales & Marketing**
- 2. Destination Stewardship**
- 3. Community Alignment**
- 4. Trailblazing Organization**



Goal #1

Leading-Edge Sales & Marketing

Targets	Objectives	Lead	Timeline		
			2020	2021	2022
<ul style="list-style-type: none"> Higher-than-average results for all standard industry digital metrics 3% annual growth rate of group sales YOY 	a) Amplify marketing and sales efforts of unique assets to markets of highest affinity	Exec Director, Marketing, Sales	X	X	
	b) Secure long-term funding for larger event development & bid support	Exec Director	X	X	X
	c) Increase marketing partnerships with the public and private sectors	Marketing	X	X	X
	d) Increase sales partnerships with the public and private sectors	Exec Director	X	X	X
	e) Build on existing events and cultural tourism experiences	Marketing	X	X	X
	f) Increase sports tourism business	Sports Sales	X	X	X
	g) Continue to advocate for improved visitor data	Marketing	X	X	X

Goal #2

Destination Stewardship

Targets	Objectives	Lead	Timeline		
			2020	2021	2022
<ul style="list-style-type: none"> 1 new event each year that drives visitation Launch destination master plan in 2021 Mystery shopper score over 85 for visitor information counselors 	a) Collaborate with community to develop new products and experiences year-round	Exec Director, Operations	X	X	X
	b) Advocate for improved signage and wayfinding	Operations	X		
	c) Advocate for improved overall mobility and accessibility for visitors	Exec Director	X	X	X
	d) Develop destination master plan	Exec Director		X	
	e) Continue to deliver world-class visitor services	Operations	X	X	X

Goal #3

Community Alignment

Targets	Objectives	Lead	Timeline		
			2020	2021	2022
<ul style="list-style-type: none"> 4 membership engagement opportunities per year Implement resident sentiment measurement by end of 2021 	a) Increase partnerships with the public and private sectors	Exec Director	X	X	X
	b) Improve resident sentiment and support	Marketing		X	X
	c) Co-develop a community-driven green initiative	Operations		X	X
	d) Increase engagement between membership and organization	Operations	X	X	X
	e) Continue strategic relationships with port and airport	Exec Director	X	X	X

Goal #4

Trailblazing Organization

Targets	Objectives	Lead	Timeline		
			2020	2021	2022
<ul style="list-style-type: none"> 10% increase in core funding over 3 years 1 new FTE each in marketing and sales by 2022 1 CDME completed and one underway by 2022 	a) Preserve and grow our funding	Exec Director	X	X	X
	b) Grow sales & marketing teams	Exec Director	X	X	X
	c) Invest in professional development initiatives	Exec Director	X	X	X

Organization Personality: We Make Awesome Happen



Thank You.

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greg.oates@nextfactorinc.com