



# Building Trust: Co-Creating a Sustainable Destination Image

Jane Cunningham

*Le* MERIDIEN

LONDON®  
& PARTNERS



DESTINATIONS  
INTERNATIONAL



BestCities  
GLOBAL ALLIANCE



We believe that **destination organizations** positively impact local communities as a dynamic place to visit, live and work.

**Destinations International**, elevates tourism by educating, equipping, empowering and connecting its members to better fulfill their missions and achieve positive results around the world.

# Our community

**10,000** engaged professionals

**756** Destination organisation members (city, region / state and country, educators)

**39** countries and territories



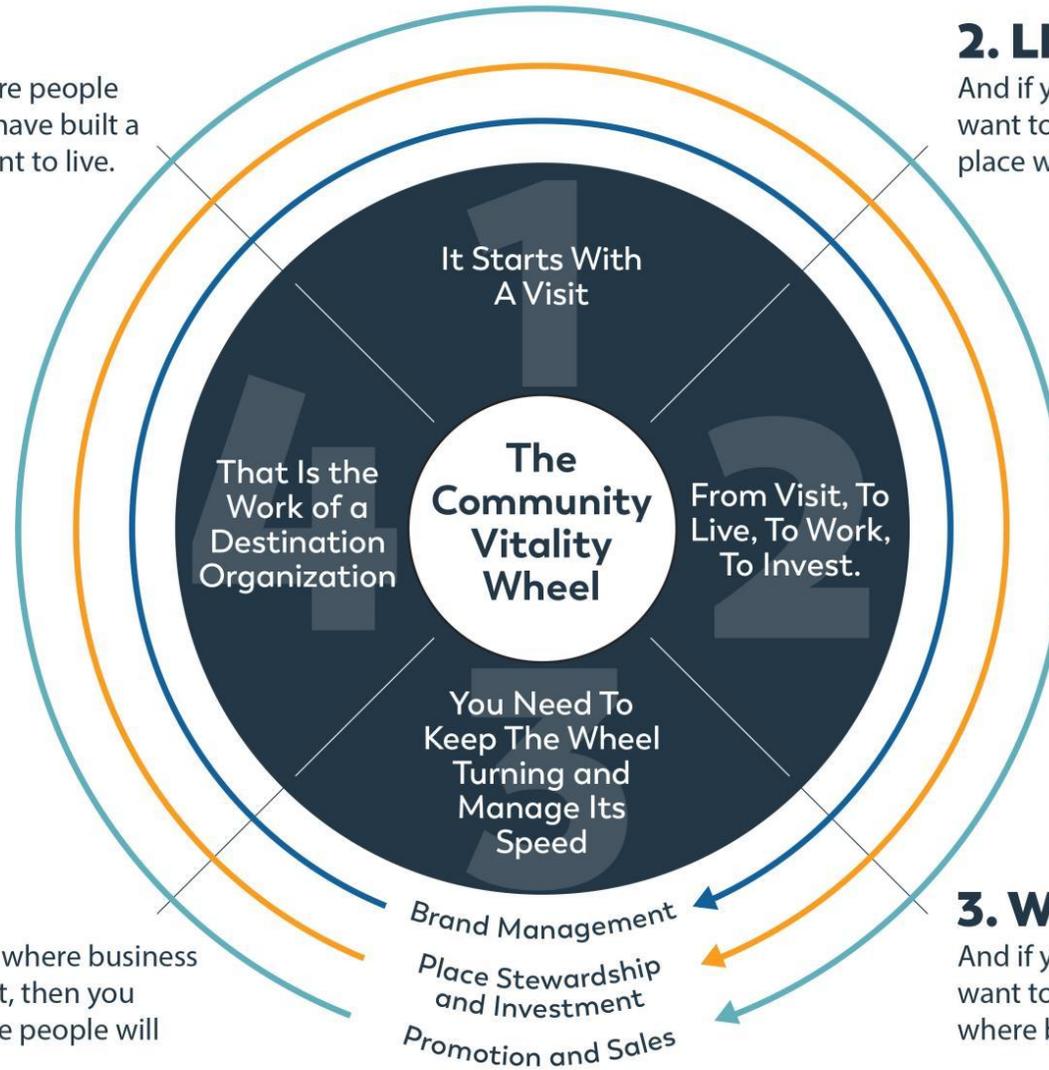
# THE WORK OF A DESTINATION ORGANIZATION

## 1. VISIT

If you built a place where people want to visit, then you have built a place where people want to live.

## 2. LIVE

And if you built a place where people want to live, then you have built a place where people want to work.



## 4. INVEST

And if you built a place where business and residents will invest, then you have built a place where people will want to visit.

## 3. WORK

And if you built a place where people want to work, then you have built a place where business and residents will invest.

# CONTENT THEMES 2026 & 2027

## Theme

## Goal

**Advocacy & Influence**

Equip destinations to **influence political and community environments, securing funding and support.**

**Resilience & Readiness**

Strengthen destinations' **ability to adapt to financial, political, and environmental disruptions.**

**Placemaking & Community Alignment**

Align visitor experiences with resident priorities through **partnerships, placemaking, and stewardship.**

**Innovation & Storytelling**

Advance use of **technology, data, and authentic storytelling** to connect both locally and globally.

**Organizational Excellence**

Equip destination organizations with **clear standards, effective operations, and leadership pathways that strengthen performance today and build the next generation of leaders for tomorrow.**



DESTINATION  
**NEXT**

**2025**

DESTINATIONS INTERNATIONAL  
**FUTURES STUDY**



# 2025

## 5 Global Advisory Panels

**1** Community

**2** Industry

**3** Customers

**4** New! Unusual Suspects

**5** New! Investors & Developers

# **8 forces defining the next era of destination leadership**

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**Securing  
Investment  
Through Advocacy  
and Impact**

**Navigating  
Economic and  
Geopolitical  
Uncertainty**

**Scaling  
Organizational  
Capacity to Meet  
Expanding  
Expectations**

**Shaping Places  
for People and  
Prosperity**

**Reimagining  
Destination  
Marketing in the  
Age of AI and  
Authenticity**

**Driving Impact  
Through  
Intentional Event  
Strategies**

**Advancing  
Regeneration  
and Building  
Long-Term  
Resilience**

**Building a  
Future-Ready  
Industry  
Workforce and  
Organization**

# How the Industry is Responding

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- 1** **+3** **Develop the destination brand rooted in the community's goals, values and creative energy to deliver authentic experiences for the customer**
- 2** **+15** **Lead destination advocacy by strengthening government relations to shape supportive policies**
- 3** **+15** **Strengthen local community engagement and sentiment to build sustainable support for the visitor economy**
- 4** **-3** Safeguard existing revenue streams while exploring diverse funding sources to maintain and expand financial stability
- 5** **-2** Better align tourism and economic development
- 6** **NEW** **Develop and lead a comprehensive destination master plan that defines long-term strategy while integrating product development initiatives**
- 7** **+9** Establish multi-dimensional data-driven KPIs to measure and enhance both economic and social impacts of a sustainable visitor economy
- 8** **+35** **Leverage data management capabilities and innovative technologies, including generative AI, to enhance business intelligence, marketing, and community engagement**
- 9** **NEW** Embrace adaptability by developing strategies with flexible initiatives that can adjust to a range of potential futures and disruptions
- 10** **+4** Develop and support new events that enhance destination brand, attract visitors, and support the local economy

- | EMEA Rank | Global Rank | Trend  |
|-----------|-------------|--|
| 1         | 10          | <b>Destinations are prioritizing visitors who deliver greater economic, cultural, and environmental value, rather than simply pursuing volume growth</b>   |
| 2         | -           | <b>Industry leaders need multi-dimensional KPIs that go beyond traditional economic metrics to effectively measure and communicate the industry's full economic, social, and environmental value</b> |
| 3         | 1           | Tourism needs increased advocacy and recognition from government to grow economic impact   |
| 4         | 3           | Greater industry, community and government alignment is driving destination competitiveness and brand  |
| 5         | 9           | Geopolitical tensions and nationalism are rapidly altering global travel flows, as travelers seek destinations perceived as safe and welcoming   |
| 6         | 26          | <b>Business event customers are drawn to destinations that leverage intellectual capital, foster collaboration, and prioritize long-term economic and social legacy</b>                              |
| 7         | 24          | Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts  |
| 8         | 13          | Destination Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources   |
| 9         | 5           | <b>Resident sentiment and community engagement are critical to maintaining destination alignment</b>   |
| 10        | 11          | Industry must address skilled labor shortages, labor pipelines, and generational workplace shifts  |



COMMUNITY  
TRUST AND  
VITALITY

VIBRANT  
ECONOMIC  
GROWTH

# Event Impact Calculator

developed by Tourism Economics

The Event Impact Calculator is utilized by over 300 destination organizations worldwide and is the global standard for measuring net new money coming to a community because of meetings and events.



MEETINGS



SPORTS



FESTIVALS



LOCAL &  
PUBLIC EVENTS

<https://destinationsinternational.org/event-impact-calculator>

**Destination Organizations are  
fundamentally transforming.**

**84%**

**Number of global  
Destination Organizations  
actively involved in  
destination development**

# Defining Destination Development

Destination development is the strategic art of shaping and enhancing places to deliver exceptional visitor experiences, foster local pride, and drive economic vitality.

It prioritizes creative placemaking, meaningful community collaboration, and innovative tourism investments to build vibrant and resilient destinations.



## How is your organization involved in destination development?

Educating industry on how to develop product/support business case development

13%

Fostering partnerships with stakeholders, funders, developers, brands and government

19%

Working with developers to support experiential assets

13%

Advocacy  
15%

Supporting air service development

10%

Leading accessibility programs and initiatives

7%

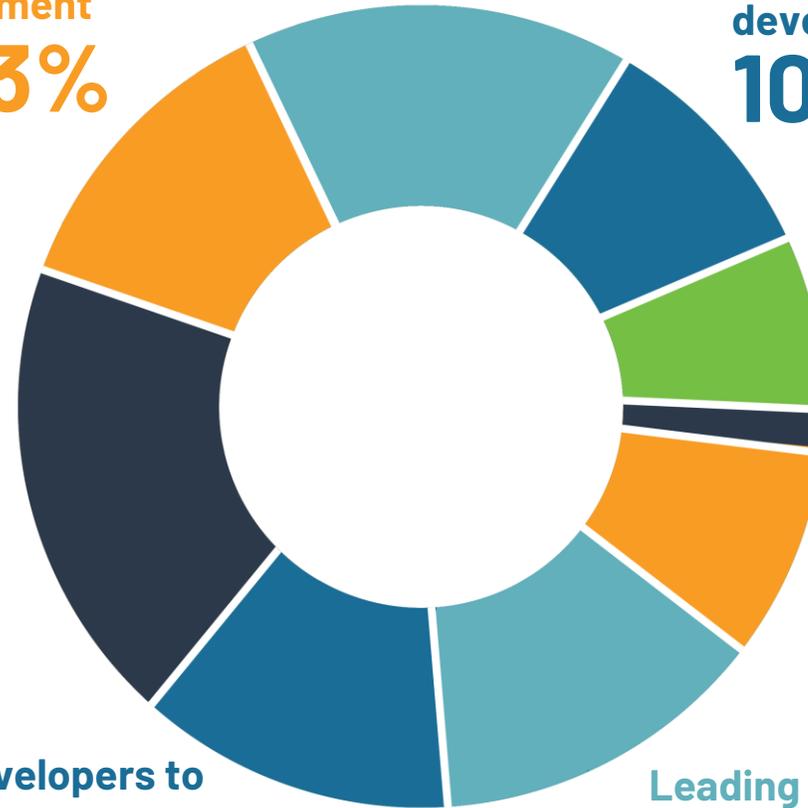
1% Others

Investment and funding

9%

Leading destination master planning

14%



# Core functions of destination development:

**Data  
intelligence**

**Government  
relations +  
advocacy**

**Community  
partnerships**

**Investment  
readiness**

# Destination Development Activity Pyramid

HERO

**HERO: Newsworthy projects/activities; timebound reasons to travel**

- Product development
- Product expansion
- Incubator/accelerator programs
- Remarkable experiences
- Festivals and major events

HUB

**HUB: Regularly scheduled projects/activities; daily-use visitor tools**

- Visitor Servicing
- Wayfinding
- Integrating tourism into symbiotic industries (economic development)
- Compelling experiences
- Remarkable services (customer service training)
- Niche tourism development (rural tourism, Indigenous tourism, bilingualism/francophone)
- Placemaking

HYGIENE

**HYGIENE: Always-on projects/activities; foundational to tourism**

- Advocacy and community engagement
- City-building projects – adding tourism lens
- Visitor experience maintenance
- Quality Infrastructure
- Dispersion frameworks
- Transportation advocacy
- Accessibility/inclusivity
- Connectivity/Public Wifi

# Sample Destination Development Fund Successes

## Mahogany Harbour Public Dock



Rural tourism infrastructure, neighbourhood amenity, tourism dispersal

## InterZip Rogers Zipline



Seasonal tourism attraction, downtown revitalisation, urban infrastructure

## Ottawa Christmas Market



Festival/event experience development, placemaking, need period/winter experience

# The Context Has Changed

A network diagram with nodes and connecting lines on a dark blue background. The nodes are represented by small teal circles, and the lines are thin, light blue lines connecting the nodes. The diagram is centered on the page, with the main text overlaid on it.

# Factors Beyond Our Control



**Global geopolitical tensions are reshaping travel flows**



**Economic volatility is demanding new agility**



**Climate change and social challenges requiring immediate responses**

# Expanding Expectations



**Communities are  
demanding a  
greater voice in  
destination shaping**



**Governments  
are expecting  
broader  
economic impact**



**Travelers  
are seeking  
authenticity and  
responsibility**

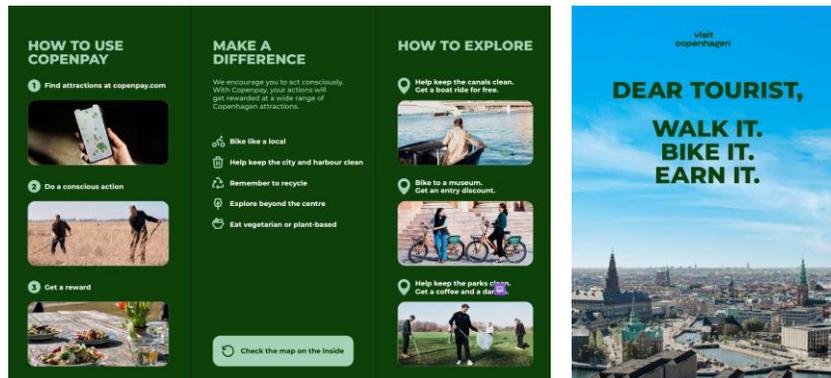
# COMMUNICATION IN THE CITY

wonderful  
copenhagen

## Outdoor ads



## Handouts w. map



## Website



# WHY DO PEOPLE CHOOSE TO USE COPENPAY?

48% says they do it to enjoy unique experiences

23% are motivated by free or affordable experiences

22% are motivated by the sustainability aspect

8% say they do it to meet new people

# Building Trust in a Time of Skepticism

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**Trust is now the true currency of destination leadership.**

**It's earned not through marketing, but through the consistency of our actions and the transparency of our intent.**

# Advocacy Tools

## Community Impact of Tourism

Ottawa Tourism's 2024 Economic Impact Study shows tourism positively impacts quality of life in Ottawa

### TOURISM ENCOMPASSES



**Ottawa Tourism In The Community**

- Creates community prosperity through tourism
- Increases tax revenues for all levels of government
- Drives economic impact and development
- Funds innovation and new attractions/business ventures
- Attracts meetings, conventions and major events



Ottawa welcomes **9.8 million** visitors annually. Visitors spend **\$2.6 billion** each year.

The visitor economy employs **35,390 people** annually (direct, indirect, induced).



For every household in Ottawa, the visitor economy supports almost **\$2,000** of government services.

Tourism in Ottawa contributes **\$921 million** in taxes annually to federal, provincial, and municipal governments combined.

Tourism in Ottawa generates **\$2.8 billion** in total GDP and **\$3.1 billion** in direct economic output.

Source: InetVISTA5



August 2024

## Destination Stewardship Plan: 2024 Updates

In 2022, Ottawa Tourism led the creation of the Destination Stewardship Plan, a 10-year roadmap that enhances the long-term prosperity of our destination. Check out some of its 2024 highlights and what's on the horizon for 2025!

Community Ottawa Tourism



**We bring people together**

- Opened a brand new Ottawa Visitor Centre in downtown Ottawa
- Expanded Porter Airlines' network with new hangar
- Positioned Ottawa as a regional hub for increased air route development

**We honour our heritage**

- Developed and enhanced cultural tourism product offerings with the Winter Tourism Development Fund

**We voice Reconciliation**

- Hosted over 1000 delegates at the largest Indigenous tourism conference, the International Indigenous Tourism Conference in collaboration with Kitigan Zibi Anishinabeg and Algonquins of Pikwikanagan First Nation



**We live for the outdoors**

- Developed the "From Oh! to Ah!" marketing campaign around Ottawa's urban adventure lifestyle and experiences
- Escape Bicycle Tours introduced a new cargo bike with support from Ottawa Tourism's Tourism Accessibility Fund allowing more people to enjoy Ottawa by bike

**We host sports**

- Successfully hosted the IHF World Junior Championship, welcoming fans, athletes and viewers from around the world

**We celebrate community**

- Supported the City's Nightlife Economy Strategy through hiring a Nightlife Commissioner and creation of the Nightlife Council
- Ottawa Board of Trade and the Canadian Urban Institute delivered the Downtown Action Plan, "A Living Capital"



**We love our terroir**

- Fairmont Château Laurier developed the Chefs at the Castle Michelin experience which raised the profile of Ottawa's culinary scene

**We value sustainability**

- Prosperity Leveraged a refreshed Think Ottawa program to empower industry professionals to bring more conferences and events to our destination

**Planet:** Partnered with La Table des Chefs to redirect close to 100,000 meals from conferences and events and distribute it to those in our community that are facing food insecurity

**Prosperity:** Measured and communicated the significant economic impact of tourism on the Ottawa community

**People:** Supported the development and improvement of nearly 20 businesses in making their offerings more inclusive through the Tourism Accessibility Fund



ottawatourism.ca

## Investing in Tourism Growing Jobs, Revenue & Global Reach

### TOURISM IS



Ottawa welcomes **10 million** visitors annually. Visitors spend **\$2.6 billion** each year

### Tourism is a growth-enabling export industry for Ottawa

In Ottawa, the visitor economy employs over 35,000 people annually (direct, indirect, induced), including underserved populations, such as: women, minorities, new Canadians and youth



### Ottawa Tourism in the Community

- Creates community prosperity through tourism
- Increases tax revenues for all levels of government
- Drives economic impact and development
- Funds innovation and new attractions/business ventures
- Attracts meetings, conventions and major events
- Positions tourism as an export industry, showcasing Canada to the world and attracting foreign investment

### Opportunities for Federal Leadership

- Fuel Signature Offerings**: Boost funding and enhance experience at national tourism assets (museums, Canada Day, Winterlude) and foster public-private partnerships to maximize economic and social impact
- Enhance Federal Public Spaces**: Modernize policies to prioritize animation, streamline approvals to elevate visitor experiences
- Activate Federal Assets**: Optimize urban greenspaces by reducing red tape, enabling dynamic events, and expanding public access
- Grow International Convention Attraction Fund**: Support Canadian cities like Ottawa to host high impact international business events
- Attract Major Events**: Expand funding for high-impact tourism events, encourage private-sector investment, and boost year-round programming to drive visitation beyond peak seasons
- Revitalize Downtown**: Ensure stable P.L.I. funding, streamline transfer processes, and repurpose federal assets to bring Ottawa's core to life
- Prioritize Tourism in a Ministerial Portfolio**: Ensure strategic leadership for tourism around the Cabinet table
- Implement the Federal Tourism Growth Strategy**: Drive long-term success nationally



Tourism in Ottawa contributes **\$921 million** in taxes annually to federal, provincial, and municipal governments combined



April 2025





# Thank you

[jcunningham@destinationsinternational.org](mailto:jcunningham@destinationsinternational.org)