‘The Impact of Digital Media for City Destination Management’

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4th Global Summit On City Tourism: ‘Re-Inventing City Tourism’
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SESSION 4: Sustainable Tourism and Effective Destination Management in Cities for a Quality Visitor Experience
Agenda

Part 1 – Key trends in the use of digital media

Part 2 – Key opportunities for city destination management and marketing over the next five years
Part 1
Key trends
GLOBAL DIGITAL SNAPSHOT
A SNAPSHOT OF THE WORLD’S KEY DIGITAL STATISTICAL INDICATORS

TOTAL POPULATION
ACTIVE INTERNET USERS
ACTIVE SOCIAL MEDIA ACCOUNTS
UNIQUE MOBILE USERS
ACTIVE MOBILE SOCIAL ACCOUNTS

7.210 BILLION
3.010 BILLION
2.078 BILLION
3.649 BILLION
1.685 BILLION

URBANISATION: 53%
PENETRATION: 42%
PENETRATION: 29%
PENETRATION: 51%
PENETRATION: 23%

SHARE OF WEB TRAFFIC BY DEVICE

- Share of web page views: Laptops & desktops
  - Share of web page views: Mobile phones
  - Share of web page views: Tablets
  - Share of web page views: Other devices

62%  
Year-on-year: -13%

31%  
Year-on-year: +39%

7%  
Year-on-year: +17%

0.1%  
Year-on-year: +18%
A quarter of the world’s population will own a smartphone by the end of 2015.

Smartphone are used throughout the travel process.

### USED DURING ANY PHASE

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<td>Leisure Travelers</td>
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### Inspiration

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### Research

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### Purchase/Booking

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### Experiencing/Traveling

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### Post Traveling

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Source: The 2014 Traveler’s Road to Decision – think with Google
**Worldwide Social Network Users by Region - Billions (eMarketer)**

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<tr>
<th>Year</th>
<th>Asia Pacific</th>
<th>Latin America</th>
<th>Middle East &amp; Africa</th>
<th>North America</th>
<th>Central &amp; Eastern Europe</th>
<th>Western Europe</th>
<th>Worldwide</th>
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<tr>
<td>2011</td>
<td>1,220</td>
<td></td>
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<td>2012</td>
<td>1,468</td>
<td>155</td>
<td>160</td>
<td>174</td>
<td>174</td>
<td>164</td>
<td>1,468</td>
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<tr>
<td>2013</td>
<td>1,733</td>
<td>174</td>
<td>181</td>
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<td>188</td>
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<td>1,733</td>
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<tr>
<td>2014</td>
<td>1,965</td>
<td>190</td>
<td>186</td>
<td>249</td>
<td>247</td>
<td>217</td>
<td>1,965</td>
</tr>
<tr>
<td>2015</td>
<td>2,177</td>
<td>203</td>
<td>195</td>
<td>287</td>
<td>280</td>
<td>210</td>
<td>2,177</td>
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<tr>
<td>2016</td>
<td>2,372</td>
<td>213</td>
<td>202</td>
<td>325</td>
<td>303</td>
<td>204</td>
<td>2,372</td>
</tr>
<tr>
<td>2017</td>
<td>2,550</td>
<td>223</td>
<td>209</td>
<td>358</td>
<td>324</td>
<td>204</td>
<td>2,550</td>
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The internet is the top source for both leisure and business travel planning

TRAVEL PLANNING SOURCES

Leisure Travelers

- Internet: 74%
- Family, friends, or colleagues offline: 48%
- Family, friends, or colleagues online: 26%
- Informational brochures: 23%
- TV: 20%
- Magazines/newspapers: 18%
- Books: 14%
- Travel agents: 13%
- 800 or toll-free number: 10%
- Travel groups: 7%
- Radio: 7%
- Other: 5%

Online sources (net): 78%
Family, friends, or colleagues (net): 52%

Business Travelers

- Internet: 77%
- Family, friends, or colleagues offline: 35%
- Family, friends, or colleagues online: 27%
- Informational brochures: 26%
- TV: 28%
- Magazines/newspapers: 27%
- Books: 20%
- Travel agents: 30%
- 800 or toll-free number: 19%
- Travel groups: 18%
- Radio: 14%
- Other: 6%

Online sources (net): 80%
Family, friends, or colleagues (net): 41%

Base: Personal quota (n=3500); Business quota (n=1500)
Q7: Which of the following sources do you typically use to plan personal or leisure trips/business trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Source: The 2014 Traveler’s Road to Decision – think with Google
Search engines are among the **most popular online planning sources for travelers**, particularly among leisure travelers.

**TOP 10 ONLINE SOURCES USED IN TRAVEL PLANNING**

**Leisure Travelers**
- Search engines: 60%
- Hotel sites/apps: 48%
- Online travel agency: 40%
- Airline sites/apps: 39%
- Map sites/apps: 38%
- Travel review sites/apps: 36%
- Travel search sites/apps: 33%
- Destination-specific sites/apps: 30%
- Social networking sites/apps: 26%
- Car rental sites/apps: 22%

**Business Travelers**
- Hotel sites/apps: 60%
- Search engines: 55%
- Airline sites/apps: 53%
- Online travel agency: 45%
- Map sites/apps: 45%
- Car rental sites/apps: 44%
- Travel review sites/apps: 42%
- Travel search sites/apps: 38%
- Destination-specific sites/apps: 30%
- Travel planning sites/apps: 29%

Base: Use internet to plan travel (Personal n=2734, Business n=1199)
Q10: Which of the following online sources do you typically use to plan personal or leisure trips/business trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Source: The 2014 Traveler’s Road to Decision – think with Google
Key trends: main conclusions

• The penetration of Internet usage in general and social media in particular is very high, particularly amongst international travellers.

• Smartphone usage is already huge and growing rapidly, particularly in the developing economies. The growth drives increased use of social media.

• Digital media will become increasingly important for communicating with tourists travelling to and within destinations.

• Social media represent key mechanisms for inspiration and for customer relationship management.
Part 2
Key opportunities for destinations over the next five years

- Content generation & distribution
- Emerging technologies to enhance the visitor experience
Content generation and distribution

Key messages:

• This is an essential component of successful destination marketing

• Destination tourism organisations can and should gather destination content from multiple sources, including social media

• There are multiple opportunities for distributing your destination content through external sites that have huge audiences and through social media
Content generation through social media, example: ‘This is Copenhagen’ Campaign

- In March 2015, Wonderful Copenhagen, the city’s DMO, launched a campaign in cooperation with the airline Norwegian, aimed at attracting more American visitors to Copenhagen, giving them a personal and authentic taste of the city as four new routes were opened from the US to Copenhagen.

- They crowdsourced real Copenhageners’ Instagram videos (via their Instagram community – they asked them to help with submitting short videos by hashtagging them and within a few weeks they received 500 videos).

- Content from these and other Instagram videos were edited them into nine themes to match the target markets’ interests.

- After 3 months, the campaign generated direct airline bookings worth over 10 million DKK (€1.3m).

Watch case study at https://vimeo.com/133661026

Sources: http://www.konstellation.dk/work/wonderful-copenhagen-this-is-copenhagen/ and https://vimeo.com/133661026
Play video via [http://www.konstellation.dk/work/wonderful-copenhagen-this-is-copenhagen/](http://www.konstellation.dk/work/wonderful-copenhagen-this-is-copenhagen/).
Distribution – TripAdvisor, the key player

July 2015 data

350 million unique monthly visitors

More than 290 million reviews and opinions from travellers around the world.

More than 5.3 million businesses and properties in 126,000+ destinations, including:
- 950,000+ hotels, B&Bs, and specialty lodging
- 740,000+ vacation rentals
- 3 million restaurants
- 590,000+ attractions

More than 46 million traveller photos.

More than 190 new contributions are posted every minute.

More than 90 million marketable members worldwide.

Nearly 2,600 new topics on average, are posted every day to the TripAdvisor forums.

More than 85 percent of questions posted to TripAdvisor’s English-speaking forums are replied to by other travellers within 24 hours.

Source: http://www.tripadvisor.co.uk/PressCenter-c4-Fact_Sheet.html.
TripAdvisor work with DMOs

- TripAdvisor provides DMOs and tourism brands various ways of distributing content – some free of charge, others (for campaigns) chargeable.

- It has produced a new ‘dashboard’ for DMOs to measure their performance. It has had a dashboard for individual tourism businesses for more than two years.

The “Red City” of Marrakesh is a magical place, brimming with markets, gardens, palaces, and mosques. Exploring the intimate courtyards and snaking alleyways of the historic Medina can easily eat up a day. Find inner peace at the serene Jardin Majorelle or take in the beauty.
Local Experts: Videos

Parkour in Singapore

Whether you're a nature lover, culture buff or thrill-seeker, Singapore has a wide selection of memorable leisure options, all within easy reach.

Emerging technologies / applications

**Key Message:** new technology applications create opportunities to enhance the visitor experience

- Virtual Reality, Augmented Reality and iBeacons
- Examples: South Africa, Qantas, Hong Kong, Barcelona (Gaudi), Queensland
Virtual Reality goes mainstream in 2016!

**VR – Virtual Reality**

the computer-generated simulation of a three-dimensional image or environment that can be interacted with in a seemingly real or physical way by a person using special electronic equipment, such as a helmet with a screen inside or gloves fitted with sensors.

“Oculus Rift is unlike anything you’ve ever experienced. Whether you’re stepping into your favourite game, watching an immersive VR movie, jumping to a destination on the other side of the world, or just spending time with friends in VR, you’ll feel like you’re really there.”

Google’s Cardboard headset can be purchased for less than $20 on Amazon, and supports all smartphones.

More than 24 million devices will be sold in 2018

South Africa Tourism 360 Oculus Rift Experience

• Video shot using a series of cameras in 3D printed mounts to create a full 360-degree effect with the use of 360 degree sound to accompany the video.

• Oculus Rift footage showcasing 6 scenes in South Africa to bring tourists to South Africa virtually giving them a real taste of South Africa.

See how it was done: Play video

“As far as we know, this is the first time a tourism board based in the UK has used Oculus Rift to showcase their destination in such a varied and immersive way, using this state-of-the-art technology to create an interactive and immersive experience,” Tolene van der Merwe, South Africa Tourism UK Country Manager

First-class passengers can strap on a Samsung Gear VR and watch Jaunt’s videos of Sydney’s Harbor Bridge or take a boat ride in Kakadu National Park, before ever landing down under. Basically it’s an enhanced version of the ubiquitous in-flight edutainment vids available to everyone—but with more fun novelty and biz-plus bragging rights beyond the free champagne and caviar.

AR – Augmented Reality

Augmented Reality is a technology that is able to superimpose a computer-generated image on a user's view of the real world through a device such as a smartphone providing a composite view of reality.
Discover Hong Kong AR Mobile Apps

- The Hong Kong Tourism Board has developed a large number of mobile apps, including apps using AR.

- One of these apps is called ‘Discover Hong Kong – AR’ and was developed by the Hong Kong Tourism Board (HKTB) in conjunction with Cathay Pacific Airways. With AR, visitors can aim, tap and discover what the city has to offer with images, information and directions depending on where and what they are looking at.

Source: [http://www.discoverhongkong.com/eng/plan-your-trip/travel-kit/mobile-apps.jsp#ixzz3sWIFDwRo](http://www.discoverhongkong.com/eng/plan-your-trip/travel-kit/mobile-apps.jsp#ixzz3sWIFDwRo)
Another example, if the ‘Discover Hong Kong – City Walks’. This App also uses AR technology and leads visitors through **four themed walking trails** in the urban areas of Hong Kong.

- The app provides in-depth information on each of the attractions along the trails, enriching visitors’ travel experience in Hong Kong.
- The HKTB collaborated with PCCW to provide Wi-Fi services at over 8,000 hotspots for visitors to access DiscoverHongKong.com and download the travel applications onto their smart phones at no cost. This service was aimed to help to enhance visitors’ experience during their stay in Hong Kong.

Barcelona – AR tour at Gaudí’s Casa Batlló

- Antoni Gaudí’s Casa Batlló is a UNESCO World Heritage Site and a spectacular building. The AR tour show what it looked like when the Batlló family lived there.

- Casa Batlló use new technologies and have included new content that combines augmented reality and virtual elements to offer a much more dynamic, captivating and surprising cultural visit concept.

- Thanks to the AR MobileReady App visitors can, in each room, hold the tablet up to different areas of the room to see a representation of the furniture, rugs, window dressings, and more that belonged in the home.

iBeacons

In simple terms, the iBeacon is Apple’s version of a small transmitter that on location communicates with smartphone devices in close proximity to the beacon, instructing the smartphone to present specific information at a particular time and location.
iBeacons

To work, there has to be a transmitter (the ibeacon), a receiver (a smartphone application) and content (information to be communicated).
iBeacons network across Queensland

• The iBeacons network is designed for users of the ‘This is Queensland’ app

• 150 iBeacons installed across Queensland’s 13 tourism destinations at airports, visitor information centres, national parks and other popular tourism attractions.

• The beacons will automatically deliver information about the top things to see and do in the local area to users of the app.

• The beacons will also be used at major events, alerting attendees to information about the event and destination.

“It’s technology that will enhance the visitor experience and makes discovering Queensland’s destinations easy and enjoyable.”
(Queensland Minister for Tourism, Major Events and Small Business, Kate Jones)

Looking ahead: the Third Wave
List of potential applications:

- ‘Internet of Things’
- ‘Internet of Me’
- Wearable technology
- Big data
- Mobility platforms
- Location-based services
- Driverless cars
- Robotic devices
- 3D Printing
- New mobile payment applications
- Wireless optical networking technology (Li-Fi)
- Many other applications, such as gesture technology, voice recognition and instant and efficient mobile translation
Figure 9: Projected growth in wearable devices

- 35% compound annual growth 2014-2019
- Rest of wearables market
- Fitness bands and other activity trackers
- Smartwatches

Units shipped annually (millions)


Today, more than **99% of things** in the physical world are still not connected to the Internet.

But a phenomenon called “The Internet of Everything” will wake up **everything you can imagine**.

By 2020, **37 billion intelligent things** will be connected to the Internet.

Using microsensors on the network, everyday objects become connected and intelligent.

**Internet of Everything** connects the physical world to the Internet.

Thank you for your attention!

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