

# DESTINATION MIAMI

GREATER MIAMI AND THE BEACHES

STRATEGIC PLAN 2020-2025



GREATER MIAMI  
CONVENTION &  
VISITORS BUREAU

THE OFFICIAL DESTINATION SALES & MARKETING ORGANIZATION FOR GREATER MIAMI AND THE BEACHES.



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## EXECUTIVE SUMMARY

Greater Miami and the Beaches has evolved into one of the most diverse and dynamic destinations in the world in little more than a generation. The fusion of Latin, Caribbean, African and European influences has elevated Greater Miami on the world stage with a bravado uniquely its own, attracting a wide cross-section of visitors from around the globe.

Signature destination marketing programs along with infrastructure and real estate investment have propelled Miami-Dade County as one of the fastest growing counties in the eastern U.S. in 2019, according to the U.S. Census Bureau.

Today, Greater Miami has entered a new era where it must address numerous challenges brought about by its status and success as a global destination. Specifically, with regard to the visitor economy, there are many complex issues relating to mobility, workforce development, inclusivity, affordability and sustainability that will require the public and private sectors to collaborate more intentionally than ever before to address effectively.

The Strategic Plan for Greater Miami and the Beaches is a 5-year roadmap to outline how the local tourism and hospitality industry can navigate a future ripe with new opportunities amid those challenges.

To inform the development of the plan, the Greater Miami Convention & Visitors Bureau (GMCVB), in partnership with the InterVISTAS and MMGY NextFactor consultant teams, convened key industry stakeholders, elected officials and hundreds of residents across the county. The collective mission during the eight-month process was to determine how to best drive the visitor economy forward, identify new opportunities to elevate the visitor experience and enhance the GMCVB's role and relevancy. At the same time, it was critical that the development of the Strategic Plan would be a community-led initiative to ensure the GMCVB's efforts continue to align with community priorities in the strongest possible way.

The project began with an extensive situation review of ongoing tourism, urban, community and economic development initiatives underway in Miami-Dade County. Supplementing that, key stakeholders from across the county including the GMCVB's Board of Directors and Bureau Committees participated in the industry standard DestinationNEXT Assessment to measure the performance of 20 key variables relating to destination strength and community alignment.

The results from the DestinationNEXT Assessment proved that Greater Miami is a trailblazing destination, plotting well above the aggregate average of more than 200 destinations worldwide that have participated in the assessment.

That was followed with 85-plus individual consultations with industry and government leaders, 15 community town hall meetings around the county, four focus groups and eight facilitation meetings with specific segments of the industry and community. The town hall meetings were conducted throughout Miami-Dade County and attracted residents, small businesses and elected officials. With input from more than 1,200 community members, the Destination Miami Strategic Plan is the most comprehensive industry, stakeholder and community outreach effort in the history of the GMCVB.

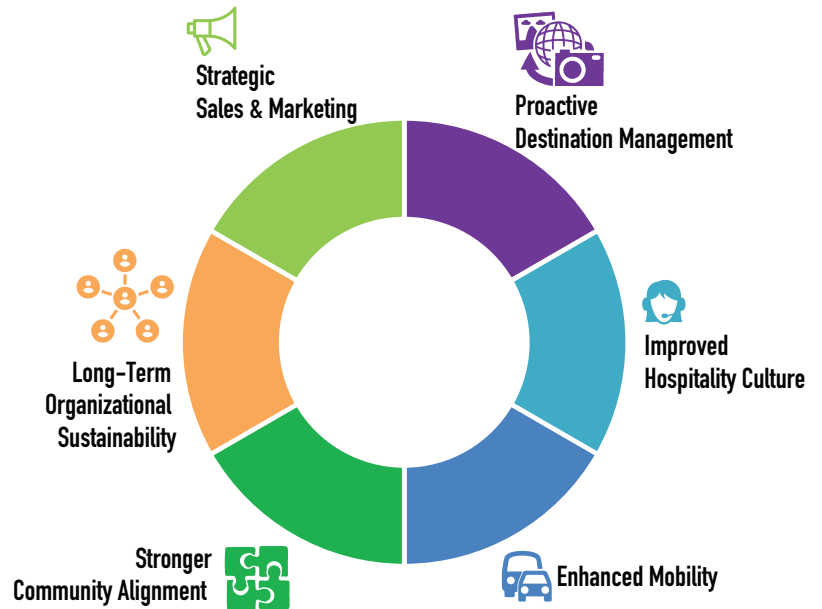
 <p><b>Interviews &amp; Meetings</b></p> <p><b>85+</b> 1-on-1 Interviews</p> <p><b>2</b> Meetings/Workshops</p> <ul style="list-style-type: none"> <li>• Board</li> <li>• GMCVB Management</li> </ul> <p><b>1</b> Visioning Workshop</p>	 <p><b>Community Engagement</b></p> <p><b>15</b> Town Hall Meetings</p> <p><b>4</b> Focus Group Sessions</p> <p><b>8</b> Committee Facilitations</p> <p><a href="http://DestinationMiami.org">DestinationMiami.org</a>  <a href="mailto:Strategicplan@gmcvb.com">Strategicplan@gmcvb.com</a></p>	 <p><b>Client &amp; Stakeholder Surveys</b></p> <p><b>1</b> Survey for Meeting Planners &amp; Tour Operators</p> <p><b>1</b> DestinationNEXT Assessment</p>
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The ultimate deliverables in the Greater Miami Strategic Plan, resulting from those extensive community engagement sessions, are six primary strategic goals supported by more than 40 actionable initiatives for the GMCVB to focus on in the next five years. The strategic goals are:

- Strategic Sales & Marketing
- Proactive Destination Management
- Improved Hospitality Culture
- Enhanced Mobility
- Stronger Community Alignment
- Long-Term Organizational Sustainability

Each of the goals was chosen based on a combination of local industry and destination analysis, resident and key stakeholder engagement sessions, and numerous meetings with the GMCVB leadership team and its various committees.

Of the 40-plus initiatives supporting those goals, the GMCVB is either in a lead or supporting role. If the organization is leading an initiative, it is responsible for providing the direction and resources to ensure the final outcome. Or, it is supporting initiatives in collaboration with any number of government, industry and/or community partners. The specific initiatives are outlined beginning on page 30.





A global leisure and business destination that delivers culturally rich, diverse and innovative experiences inspiring boundless passion in visitors and residents alike.

The GMCVB, after careful consideration of emerging trends outlined during the extensive eight-month research process, has revised both its vision and mission statements to better align with company, community and industry priorities. The GMCVB's senior leadership team developed the new vision and mission for the organization. They were approved by the GMCVB Board of Directors on September 23, 2019. The vision emphasizes the need to drive higher visitor loyalty and customer lifetime value. The new mission puts a higher priority on resilience, community building and overall quality of life.



Generate travel demand to Greater Miami and the Beaches to maximize economic impact on our community, ensure industry resiliency and elevate residents' quality of life.







## INTRODUCTION

Miami-Dade County is one of the top 10 counties in the country with the highest population growth during the last decade, according to the U.S. Census Bureau. Also, Greater Miami and the Beaches is one of the top 10 fastest growing job markets in the U.S., with a global reputation for embracing diversity and inclusion as a key selling point for investment in the region.

The leisure tourism and business events industry has played a significant role in Miami-Dade's success by providing a robust pipeline for attracting potential residents, talent and corporate interests. In 2018, Greater Miami welcomed 23.3 million visitors, including 16.5 million overnight guests, setting a new high for the county.

The local visitor economy has shifted in significant ways over the last several years. Primarily, the variety of tourism and meetings product development has evolved and expanded across a wider spectrum of communities throughout the county. Downtown Miami and Miami Beach continue to be huge demand generators for the region, but many other communities are growing market share as they develop their own unique visitor experiences and services. In fact, Greater Miami's diverse and expansive neighborhoods such as Historic Overtown, Little Haiti, Little Havana, Wynwood, the Redland and many more are credited with driving visitors' desire to stay longer and explore more of Greater Miami's "authenticity" and historic charm.

The Greater Miami Convention & Visitors Bureau (GMCVB) is intent on understanding and collaborating with that increasingly diverse network of neighborhoods welcoming visitors across Miami-Dade County. The organization also wants to continue to play a leadership role in stewarding wider visitor dispersal and delivering higher spend to more areas with the purpose of building stronger, more equitable communities.

Toward that end, the GMCVB produced this 5-year Strategic Plan to provide a roadmap for the organization, as well as local government, key stakeholders and residents living and working in the destination.

The outlook for Miami-Dade's visitor economy is positive in terms of continued growth and exposure on the world stage. According to the recent report, "Destination 2030: Global Cities' Readiness for Tourism Growth," prepared by the World Travel & Tourism Council and JLL, Miami is ranked as a "Mature Performer" with "established urban readiness and tourism infrastructure." The report states that cities in this category "Focus on monitoring growing pressure points and embracing policies to ensure citizen engagement and managing potential growth." These areas of focus are also incorporated into the findings and recommendations developed within the Strategic Plan and outlined in the pages that follow.

There are also, however, increasing challenges that come with Greater Miami's rise as a global destination. Issues around mobility, connectivity, resiliency, workforce development and community advocacy, among others, all need to be addressed, and the entire tourism and hospitality sector must collaborate to make the necessary changes happen.

This Strategic Plan is designed to build a coalition among the public and private sectors around a shared vision for the future. It was developed to benefit residents, visitors, and members of the area's hospitality and tourism industry, based on many private and group community engagement sessions with hundreds of local people driving the future of Greater Miami and the Beaches.

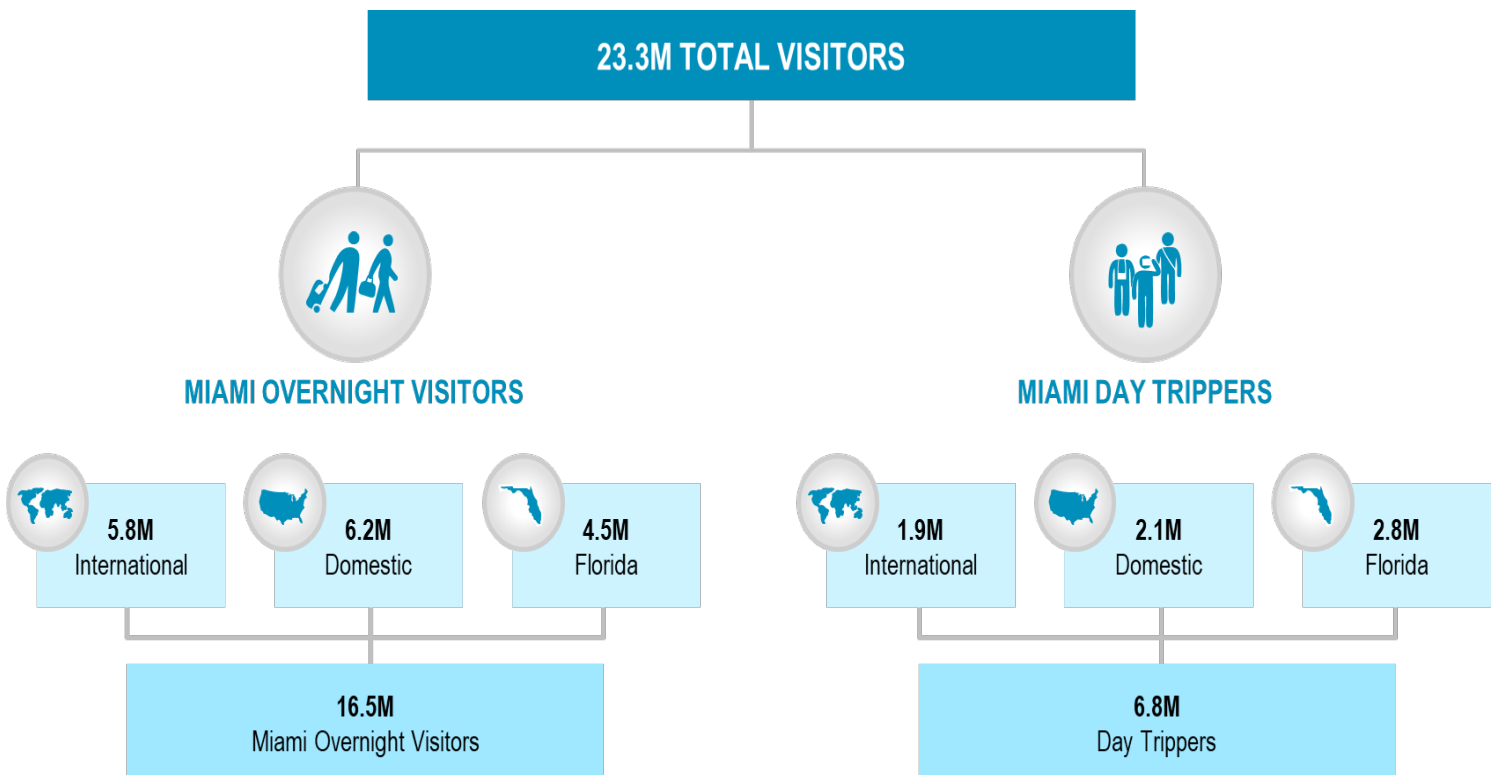
The GMCVB has created a dedicated website for this effort. Visit [DestinationMiami.org](https://www.DestinationMiami.org) for ongoing updates.

# GREATER MIAMI AND THE BEACHES MARKET OVERVIEW

## 2018 VISITATION







Over the past five years continued growth at Miami International Airport (MIA) and PortMiami, as well as stronger room demand, has resulted in a +16% increase in overnight visitors – from 14.2 million in 2013. In 2018, Greater Miami and the Beaches welcomed a record 23.3 million total visitors, consisting of 16.5 million overnight visitors and 6.8 million day-trippers. Among the overnight visitors, 69% traveled for leisure, 25% visited friends and relatives, and 15% engaged in business and convention purposes. The average length of visitor stays was 5.4 days. Domestic visitors averaged 4.2 days while international visitors stayed for 6.7 days on average. Meeting and convention visitors visited for an average of 4 days and cruise visitors stayed 2.6 days.

Meanwhile, MIA welcomed 45 million passengers in 2018, representing an increase of two percent from 2017. MIA has nonstop service from 55 U.S. markets and 98 international destinations. MIA is the largest U.S. gateway to Latin America and the Caribbean. It is the country’s third-busiest airport for international passengers, and the only one served by more than 100 carriers.



## 2018 AVERAGE LENGTH OF STAY / AVERAGE TRIP SPEND

Visitors to Greater Miami spent on average \$1,027 per trip. Domestic travelers spent \$928 per trip, and international travelers spent about 70% more at \$1,589 per trip. Breaking down by market segment, meeting and convention visitors spent \$1,100, while cruise visitors averaged \$573. Florida residents spent \$448 per trip and day-trippers averaged only \$67 per day. Overall, total direct visitor spending in 2018 amounted to nearly \$18 billion.

	DAYS	SPEND
 Domestic	4.2	\$928
 International	6.7	\$1,589
 Meeting & Convention	4.0	\$1,100
 Cruise	2.6	\$573
 Florida	-	\$448
 Day Tripper	-	\$67
<b>OVERALL AVERAGE</b>	<b>5.4</b>	<b>\$1,027</b>

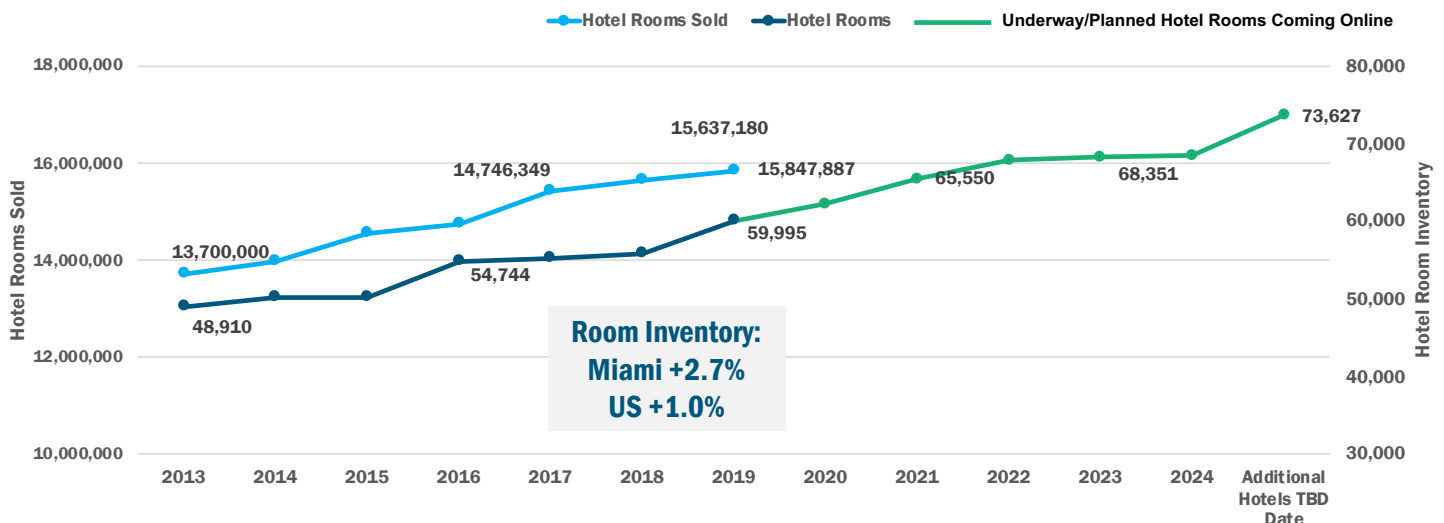
International overnight visitors comprise more than half of all overnight visitor spending and there is still room to grow. Furthermore, there are significant opportunities to expand the Florida resident market, including increasing their length of stay. With the dramatic growth at PortMiami, it will be important to entice cruisers to consider staying in Greater Miami longer on pre/post trips.

## GREATER MIAMI'S HOTEL INDUSTRY

With approximately 57,000 hotel rooms available county-wide in 2018, Greater Miami's inventory of rooms has steadily increased 2.7% per annum since 2013. That significantly outpaced the 1% average hotel capacity growth rate in the U.S. during the same period. Over the next five years, Greater Miami's hotel inventory is expected to increase 27%, reaching nearly 75,000 rooms.

Looking ahead, the high level of planned new hotel capacity along with a potential slowdown to the U.S. economy in the near future will require the GMCVB to invest in more robust sales and marketing initiatives. Stronger sales efforts will help to ensure that customer demand for hotel rooms keeps pace with the increased hotel and meeting space supply county-wide. This includes an 800-room headquarter hotel connected to the newly reimagined Miami Beach Convention Center, presenting great opportunities as the destination begins to compete for citywide conventions on a much grander scale.

### Greater Miami Hotel Room Inventory & Hotel Rooms Sold



Note: 5-Year CAGR compares 2013 to 2018 figures. Additional hotel capacity includes the MBCC HQ hotel and the Miami World Center.



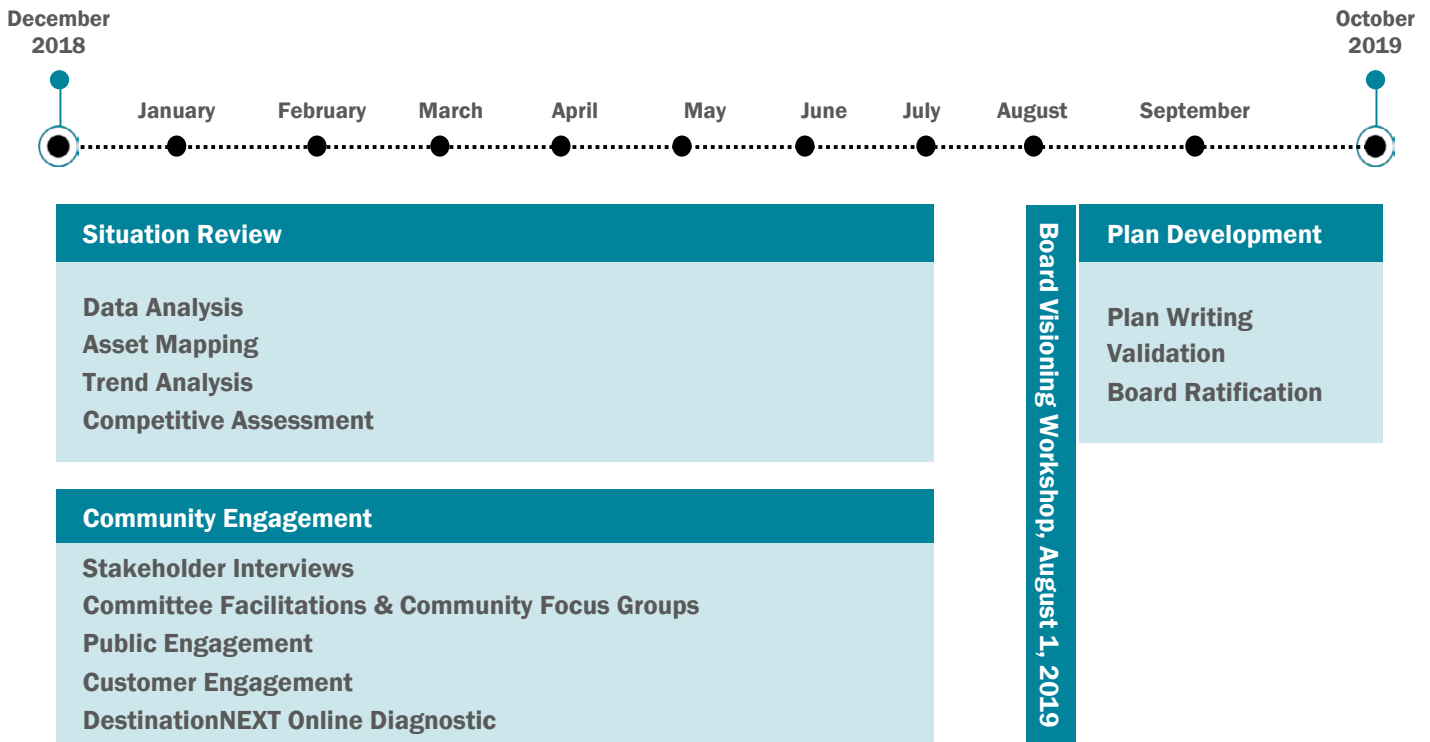
## MARKET OVERVIEW

**Key Accomplishments and Planned Infrastructure:** Below is a summary of Greater Miami’s recent major developments and planned infrastructure in conventions, transportation, cruise, retail, design and attractions.

- \$620M reimaged Miami Beach Convention Center (MBCC).
- Attached 800-room MBCC headquarter hotel approved in November 2018, estimated completion by 2023/2024.
- Virgin/Brightline express train intercity travel between Miami, Fort Lauderdale, Palm Beach open; Orlando scheduled for 2022, Tampa station in development planning; PortMiami connection planned.
- Miami-Dade County’s Transportation SMART Plan is a comprehensive program that identifies and advances six rapid transit corridors with a network system of Bus Express Transit service, in order to implement mass transit projects in Miami-Dade County.
- Two rapid bus transit corridors to be completed by 2022 – South Dade and next to North Miami.
- \$5 billion airport-wide modernization program for projects spanning the next 15 years including terminal upgrades, additional gates, and two hotels.
- New multi-million-dollar cruise terminals approved at PortMiami: MSC Cruises, Royal Caribbean, Norwegian, Virgin, Carnival.
- Disney Cruise Terminal is also planned near-term.
- \$2.7 billion Marriott World Center including retail, hospitality, residential and commercial space; attached hotel and expo center.
- \$1.05 billion Brickell City Centre, a 4.9m-sq.-ft. shopping and mixed-use development opened December 2016.
- American Dream shopping and entertainment complex approved in 2018; construction estimated to start in the next few years.
- Bayside Marketplace development undergoing \$30 million renovation to include observation tower.
- Design District underwent \$1.4 billion expansion.
- Art Basel renewed 5-year agreement through 2023.
- Phillip and Patricia Frost Museum of Science opened May 2017.
- ICA (Institute of Contemporary Art) opened Dec. 2017.
- Extensive renovations to the Museum of Art + Design (MOAD).
- Extensive renovations to The Bass – Miami Beach’s contemporary art museum.
- Miami Freedom Park and soccer stadium gained initial approval in fall 2018; \$1 billion mega mixed-use soccer complex with 11 fields and proposed \$9 million stadium, in planning review by City of Miami.



# PROJECT OVERVIEW



The Strategic Plan is an overarching framework that includes a vision, mission and strategic initiatives for the GMCVB to ensure its continued relevance and elevate its effectiveness to drive higher visitation, higher economic impacts and higher job growth. It is essentially a platform where the tourism industry, local community, and leisure and business customers come together to develop forward-looking strategies to ensure sustainable destination management and equitable business development. The Strategic Plan will also include strategic initiatives to expand meetings and convention business to fully capitalize on the newly renovated Miami Beach Convention Center and attached headquarter hotel to be built in the near future.

The process behind producing the Strategic Plan began with extensive analysis of Greater Miami’s visitor economy, industry assets and a competitive assessment. Complementing that, key stakeholders participated in a DestinationNEXT assessment survey to measure performance levels of 20 key variables relating to destination strength and community alignment. DestinationNEXT is an international study that collects data from more than 300 tourism bureaus throughout the world to develop best practices, practical actions and strategies for destination marketing organizations (DMOs) to help them stay competitive in a changing world.

The actual insights and direction for the Strategic Plan were developed from a wide variety of industry and community engagement initiatives to collectively create a 5-year roadmap for both the GMCVB and the destination. The long list of participants includes elected government officials, tourism leaders throughout Miami-Dade County, civic organizations, various private businesses, customers and clients.

The overarching end goal is to develop a selection of primary strategic goals for the GMCVB, each supported by a number of actionable initiatives to achieve those goals. (See page 30 for the specific goals and initiatives).



# COMMUNITY ENGAGEMENT

The series of community events with local elected officials, key industry stakeholders and residents contributed the most significant insights to guide the development of the Greater Miami Strategic Plan. It has been the most comprehensive industry, stakeholder and community outreach effort in the history of the GMCVB. More than 1,200 community members took part in the consultations and public group sessions located throughout Miami-Dade County. Many professionals outside of hospitality and tourism participated, including leaders in economic development, academia, transportation and public services, to ensure the Strategic Plan encompassed, addressed and connected all of the many opportunities and challenges in Greater Miami today from a destination standpoint.



## Interviews & Meetings

**85+** 1-on-1 Interviews

**2** Meetings/Workshops  
 • Board  
 • GMCVB Management

**1** Visioning Workshop



## Community Engagement

**15** Town Hall Meetings

**4** Focus Group Sessions

**8** Committee Facilitations

[DestinationMiami.org](http://DestinationMiami.org)  
[Strategicplan@gmcvb.com](mailto:Strategicplan@gmcvb.com)



## Client & Stakeholder Surveys

**1** Survey for Meeting Planners & Tour Operators

**1** DestinationNEXT Assessment

### 85+ 1-on-1 interviews

#### 2 Meetings and Workshops

- GMCVB Board of Directors
- GMCVB Management

#### 15 Town Hall Meetings

- Residents
- Elected Officials
- Industry Stakeholders
- Small Businesses

#### 4 Focus Group Sessions

- Hospitality
- Technology/Millennial
- Business Development and Real Estate
- Tourism Business Enhancement

### 8 Committee Facilitations

- GMCVB Management Team
- GMCVB Board of Directors
- Marketing Committee
- Convention Hotels
- Multicultural Tourism & Development Dept.
- Boutique & Lifestyle Hotels
- Miami-Dade City/County Mgmt. Association
- Cultural Tourism

### 1 DestinationNEXT Assessment

### 1 Survey of Meeting Planners and Tour Operators

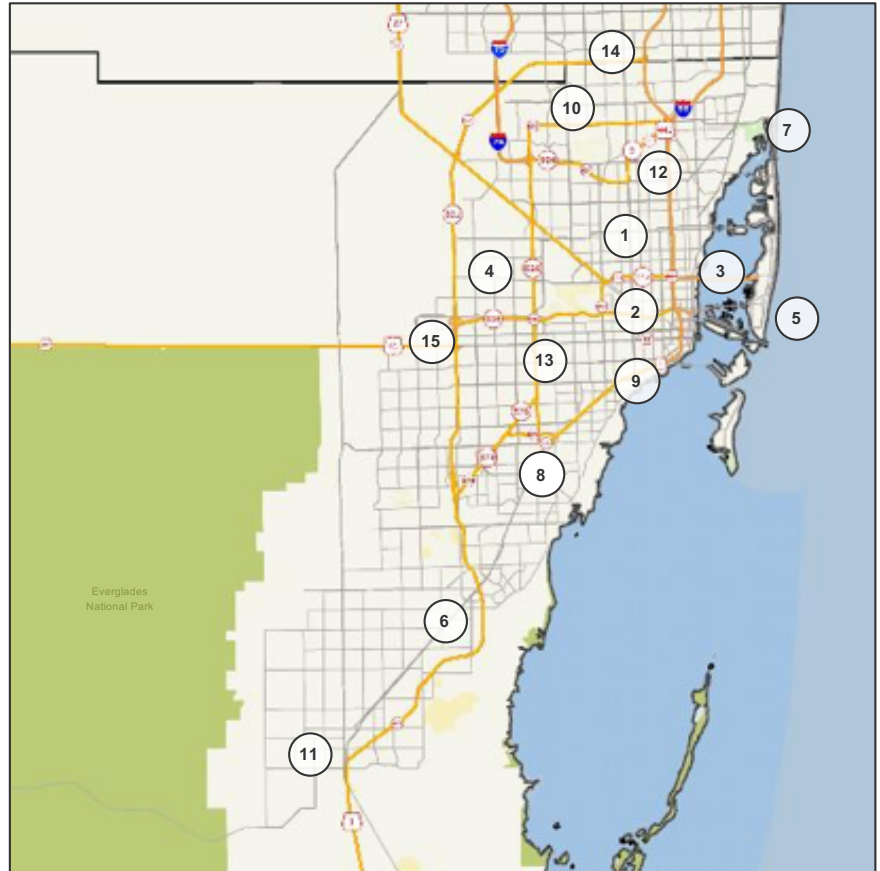


## TOWN HALL MEETINGS

The consultant team and GMCVB staff engaged in 15 town hall meetings attracting more than 625 participants from March through July 2019 across Miami-Dade County, with the goal of engaging as many key stakeholders, local businesses and residents as possible in a live environment. Below is a list of the locations, a summary of the town hall engagement process, key themes and major ideas and suggestions that have been incorporated or considered for input in the strategic plan. Each town hall discussion was scribed, videotaped and posted on the GMCVB's DestinationMiami.org website dedicated to the strategic plan effort.

### 15 TOWN HALL MEETINGS

1. **Hialeah Park Racing & Casino**  
Monday, March 18, 2019
2. **Overtown Performing Arts Center**  
Tuesday, March 19, 2019
3. **Adrienne Arsht Center for the Performing Arts of Miami-Dade County**  
Monday, April 29, 2019
4. **InterContinental Doral**  
Tuesday, April 30, 2019
5. **Miami Beach Botanical Garden**  
Thursday, May 2, 2019
6. **South Miami-Dade Cultural Arts Center – Cutler Bay**  
Tuesday, May 7, 2019
7. **Florida International University Kovens Conference Center**  
Wednesday, May 8, 2019
8. **Hilton Miami Dadeland**  
Thursday, May 9, 2019
9. **Coral Gables Museum**  
Wednesday, May 15, 2019
10. **Shula's Hotel & Golf Club – Miami Lakes**  
Thursday, May 16, 2019
11. **Seminole Theatre – Homestead**  
Tuesday, June 11, 2019
12. **Miami Dade College – North Campus**  
Tuesday, June 25, 2019
13. **West Dade Regional Library**  
Thursday, June 27, 2019
14. **Hard Rock Stadium**  
Tuesday, July 9, 2019
15. **The Patricia and Phillip Frost Art Museum, Florida International University, Modesto Maidique Campus**  
Wednesday, July 10, 2019



# COMMUNITY STAKEHOLDER FEEDBACK

During the individual consultations and community engagement sessions throughout Miami-Dade County, numerous themes were common among many of the discussions.

## The most consistent feedback collectively from communities across the county included:

- The hospitality and tourism industry needs to collaborate with community groups and engage citizens more effectively to ensure they're involved in destination development initiatives.
- Greater Miami is known for its diversity but it's paramount for the GMCVB and the destination as a whole to be more inclusive and support workforce and community development among more segments of the population.
- There needs to be greater investment across the industry to improve equitable workforce training, improve customer service and promote tourism as a viable career for all ages.
- For many community members and the hospitality industry, mobility is the biggest challenge hampering workforce development and the growth of the visitor economy everywhere in Miami-Dade.
- A larger platform to promote and support arts and culture in more neighborhoods provides a common language to unite different types of local organizations and segments of residents across all economic classes.
- It is necessary to elevate the visitor experience at Miami International Airport across every customer touchpoint and provide a sense of place as visitors begin and end their trips in this important environment.
- More can be done to provide information to locals about special events in smaller communities.
- The Florida market can be further leveraged to drive higher in-state arrivals.

## The following themes were a priority for specific focus groups and committees:

- There is consensus among municipalities across the southern half of Miami-Dade to position them collectively as a destination in their own right, with unique cultural, culinary and outdoor experiences to drive higher visitation and length of stay.
- Greater Miami is evolving as a global thought leader in sustainability and resilience, and tourism and hospitality leaders should leverage that more to position the county as a progressive destination focused on the future of the planet.
- The GMCVB should educate the hospitality and tourism industry about Miami-Dade County's Transportation SMART Plan to provide greater confidence about the long-term future of the local visitor economy; much more can be done to educate residents and the industry about all of the recent and upcoming upgrades to the transportation ecosystem planned across the county.
- The GMCVB, Beacon Council (Miami-Dade County's economic development agency), county and city governments, local chamber groups and local industry can collaborate more strategically to leverage the visitor economy to support the growth of Miami-Dade's priority sectors.
- Expand meetings and convention business to fully capitalize on the newly renovated Miami Beach Convention Center and attached headquarter hotel.
- Sports tourism is an underserved market that benefits both visitors and locals.
- All levels of government and the private sector need to advocate for the local film production industry to help elevate the Greater Miami brand worldwide.
- Key stakeholders behind Miami-Dade's major events should collaborate on a higher level to position the county as a platform for uniting cultures, based on its location at the crossroads of Europe, Africa and the Americas.
- The hospitality and tourism sector can benefit from the region's booming technology industry by collaborating more with startups and young entrepreneurs, including hosting more tech meetings and conventions.





#### Meeting Planner and Tour Operator feedback includes:

- For the right group at the right time, Miami is a spectacular meeting destination.
- Greater Miami will be a "brand new" convention destination when the Miami Beach Convention Center's headquarter hotel comes fully online.
- Would love to see more, newer downtown meeting space options.
- Need better communication/alignment among the GMCVB, the MBCC and hotel partners.
- Refocus and elevate Convention Services on clients' wants and needs.
- Clients are generally quite satisfied with the product offering across Greater Miami.
- Resort fees and parking costs continually come up as negatives.
- Clients would like to see an event calendar sortable by interest area. The GMCVB will raise better awareness of the existing calendar of events.
- Clients are interested in more co-op marketing opportunities with the GMCVB.

## INDUSTRY TRENDS

The global visitor economy is undergoing an unprecedented transformation based on changing consumer behaviors and expectations, driven by advancing technologies and socio-economic shifts worldwide. It is imperative for destination leaders to understand the evolving macro trends in travel and tourism to elevate the visitor experience, increase visitor loyalty and spend, and drive competitive advantage for all sizes of hospitality and travel providers in the region.

### THE FUTURE OF EXPERIENCES

The tours and activities sector is driving some of the most profound innovations in travel, as well as an incredible number of mergers and acquisitions in recent years. The ongoing demand for local, authentic and immersive experiences is seemingly without limits, although many consumers are not willing to commit to booking activities before their trip. That's why some of the travel industry's biggest names — TripAdvisor, Google, Booking.com, Expedia and Airbnb, to name a few — are investing heavily in selling experiences on-demand, in-destination. Others like Viator, FareHarbor, Peek, Klook and GetYourGuide are scaling exponentially as well. The big shift is how these online platforms are making it easier for travelers to book day-of experiences via simple mobile interfaces with click-to-buy functionality. Today, the increasing sophistication and lower cost of e-commerce booking engines, mixed with improved live inventory technology, means that more small tour operators are able to sell travel experiences and better convert spontaneous purchase decisions into revenue.

The GMCVB can play an active role in driving more on-demand, in-destination bookings by educating community partners about how leading technology providers are evolving their business models and expanding their platforms to help travel companies drive mobile purchases. The organization should also evaluate how it participates on these platforms to engage consumers more effectively in real time on mobile.

### INTEGRATED SUSTAINABILITY

In August 2019, the U.S. Geological Survey published a study titled, "It is Raining Plastic," detailing the discovery of micro-plastics in rainwater over the Rocky Mountains. In the same month at the G7 Summit, a coalition of 34 multinational companies named Business for Inclusive Growth, or B4IG, with more than three million employees and revenues topping \$1 trillion, launched an initiative to tackle global inequality. Today, the conversation around sustainability is much broader, encompassing economic, social and environmental impacts collectively. The United Nations World Travel Organization (UNWTO) was pushing for integrated sustainable tourism development as far back as 2005, but now the world is catching up. Younger generations especially are increasingly focused on the severe challenges facing our planet and societies, and they are making travel decisions based on how well a destination is mitigating its negative impacts. Today, more and more companies in the global visitor economy are aligning their operations with the UN's 17 Sustainable Development Goals, which is driving engagement with consumer audiences on an entirely new level.

The GMCVB should begin to filter all decision-making through the lens of integrated economic, social and environmental sustainability for the greatest benefit of the entire community. That would have a dual impact of engaging next-generation consumer audiences more effectively.

The organization has a significant opportunity to leverage the Resilience305 framework and various local leaders in sustainability to position the destination as a progressive community intent on making a positive impact on the world. Also, the GMCVB can build on the region's inherent diversity more intentionally to elevate the conversation around equitable economic development, inclusive innovation and community-driven destination development.

By focusing on the above and developing the messaging and programming necessary to drive community engagement around integrated sustainability, the GMCVB can help ensure sustainable tourism development and long-term responsible growth.



## NEW MIXED REALITIES/USE OF TECHNOLOGY

Conversational commerce platforms connect travel brands and travelers with a more frictionless immediacy, which drives higher customer engagement and conversion rates. For example, chatbots like “Rose” at The Cosmopolitan in Las Vegas are delivering 30% higher in-hotel spending. Also, San Francisco Travel employs a chat platform developed by Chatfuel, which helps consumers search for tours and activities with a highly personalized user experience. Likewise, voice-based chat is also growing with artificial intelligence platforms like Amazon’s Alexa changing the rules of customer and brand engagement. In effect, it’s a shift from machines connecting us with our friends to machines becoming our friends.

Also, new augmented reality (AR) platforms such as Google Lens are creating new ways to connect brands and visitors by providing an added layer of content customized to the individual. Google is still all about search, but now travelers just need to point their phones at something and the visual search functionality will display a wide array of information such as website links and social media commentary from friends. Looking ahead, the AR-powered “3D Internet” will change the face of experiences, entertainment, events, dining and retail in travel.

The GMCVB could develop a destination-wide chat platform to engage more visitors on their mobile devices before, during and after the travel experience. The organization should also share global best practices in conversational commerce with local travel suppliers to take advantage of chat eventually becoming much more mainstream. Likewise, the GMCVB can educate partners about augmented reality and support local tech providers active in AR development, to enhance the destination experience for both locals and visitors.

## MULTI-MODAL MOBILITY

Mobility is one of the biggest issues in modern society. Due to rising visitor and overall population volumes, many cities are developing multi-modal mobility strategies to help both visitors and locals travel and commute more easily and effectively. While there is still much more testing and research to be done, there is a growing focus on multi-modal hubs and single payment apps connecting trains, buses, cars, ebikes/scooters and other transportation options to improve efficiencies. Destination organizations are beginning to support these developments with information for visitors about how to use them.

Also, the 2020 Summer Olympics in Tokyo and Expo 2020 Dubai will both be live test laboratories for driverless vehicles and micro-payments. These new platforms will have a profound impact on automating many touchpoints throughout the travel experience. Today, autonomous vehicles (AVs) are no longer science fiction, with driverless shuttles and cars navigating public roads from Las Vegas to Oslo.

In early 2018, with help from Miami-Dade County, Ford Motor Company began testing two types of autonomous cars in Miami. The fleet of vehicles have been driving all over the region collecting high-definition mapping data. Ford has also built a service center for its autonomous vehicles near Downtown Miami to serve as its headquarters for the pilot program. Miami continues to serve as a testing ground for Ford’s self-driving cars to help build a service the local community can confidently rely on in the future.

# DESTINATION MARKETING ORGANIZATION (DMO) TRENDS

The biggest shift in tourism development today is the evolution from destination marketing to destination management and stewardship. This is more than a trend. It's a systematic re-evaluation of how destination marketing organizations can have a much broader impact in their communities by leveraging the interactions among different stakeholders, partners and clients within the region and around the world more intentionally.

## COMMUNITY-LED DESTINATION DEVELOPMENT

Destination marketing organizations are partnering with community organizations more strategically to develop neighborhood experiences that appeal to both locals and visitors and, more importantly, benefit locals as much as or more than visitors. This involves working with local economic development agencies to identify new opportunities where visitor engagement could potentially support operating costs and drive increased exposure. Washington, DC's 11th Street Bridge project and San Antonio's San Pedro Creek development are both examples where the local destination marketing organization is helping build stronger communities by promoting these local initiatives to global visitors and outside investors. In effect, this is transformative placemaking where the purpose of the development is intended to bridge cultures and re-establish links between adjacent neighborhoods and communities.

The GMCVB has actively supported community development in heritage communities in recent decades. For example, the Multicultural Tourism & Development Department developed the Tourism Business Enhancement program, which works with partners and supporting stakeholders in emerging communities to enhance their business capacity in the visitor economy.

## SELLING EXPERTISE TO MEETING PLANNERS

The most progressive destination marketing organizations worldwide are promoting their thought leaders in specific advanced industries to engage meeting organizers active in those industries. Rather than just selling a city based solely on its infrastructure, access and capacity, destination marketing organizations are driving competitive advantage by providing greater access to their priority sectors and clusters of knowledge capital. To accomplish that effectively, leaders in the visitor economy are developing broader networks with their local innovation economies, and they're preparing materials highlighting the strength of the individual sectors in terms of how meeting and event organizers can engage those clusters. It is imperative for destination marketing organizations to illustrate how this empowers both the local advanced industries and outside clients.

The GMCVB has worked successfully with local ambassadors in advanced industries to drive meeting and convention development. The Miami Magnet program, for instance, has been an effective platform for the GMCVB to support regional thought leaders who are eager to reach out to their networks to connect with event organizers and decision-makers around the world.

## THE NEW AMBASSADORS

Leading destination marketing organizations are positioning their most creative and innovative residents as the face of the destination to promote the unique cultural DNA of their communities. For example, "makers" are independent entrepreneurs who create unique products and services that define the spirit of their neighborhoods, which has a strong attraction for visitors researching a destination. Makers deliver a hyperlocal visitor experience that helps define the destination brand for various visitor audiences by connecting locals and travelers in a more personal way, revolving around shared passions.

Examples of this in action are: Melbourne, Australia's "Creative State" initiative and ambassador platform; San Francisco's "I am San Francisco" campaign; Singapore Tourism Board's "Passion Made Possible" framework; and Destination Canada's new "For Glowing Hearts" vision. All of these destinations are leveraging their most creative and innovative leaders who are delivering many types of high-impact visitor experiences, rather than just promoting the experiences themselves.



The GMCVB has developed successful signature destination marketing programs over the past several years, including the “Found in Miami” (FIM) campaign. This campaign invites visitors to discover the destination’s multicultural neighborhoods and experience unique hidden gems.

## COMMUNITY ALIGNMENT

For destination marketing organizations to be effective in their elevated roles in destination management and stewardship, there must be a high degree of support from government leaders, civic organizations and community residents. This requires astute leadership to rally key stakeholders and build a coalition around a shared vision for the future of the destination. Fundamental to this, destination marketing organizations are developing comprehensive resident sentiment surveys to gauge how community support is evolving year-over-year. Once those benchmarks are established, destination leaders can design and implement community engagement strategies based on up-to-date resident feedback.

In order to further build on the success of the GMCVB’s community outreach through the Town Hall Meetings, the GMCVB will launch “travel series” events in the near future to be held throughout Greater Miami and the Beaches. These events will serve as a speaking platform on the value tourism has on the community.

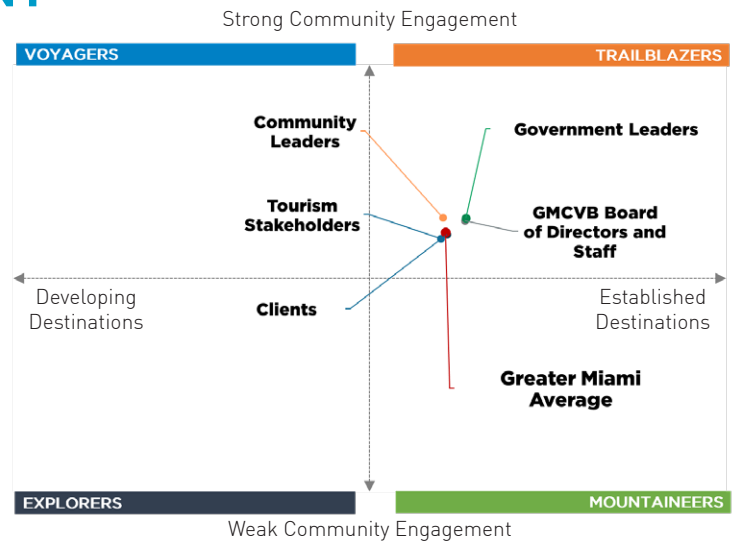
# DestinationNEXT ASSESSMENT

## DestinationNEXT KEY TAKEAWAYS

Developed by MMGY NextFactor, the DestinationNEXT analysis framework is the industry standard for defining global tourism trends, identifying new tourism strategies and gauging opportunities and challenges in a destination’s visitor economy.

Part of DestinationNEXT, the Scenario Model and Assessment Tool is based on an objective survey for evaluating 20 key variables measuring destination strength and community alignment.

MMGY NextFactor delivered a DestinationNEXT Assessment for Miami-Dade County. The survey results, compiled from the inputs of key stakeholders in the public and private sectors, were plotted on a graph in relation to more than 200 other destinations worldwide that have completed the survey.



Greater Miami scored well above average in terms of both destination strength and community alignment. Also, when segmented by the different types of survey participants, the results appear in a tight cluster. That suggests a high degree of consistent opinions among all respondents.

Greater Miami plotted inside the “Trailblazers” quadrant, which represents a destination with high destination strength and high community alignment, each above the global industry average. Destination marketing organizations in the Trailblazer category, like the GMCVB, typically have an active role in informing destination development to continually improve the visitor experience and culture of hospitality. They’re also consistently active in community advocacy and engagement in order to build a coalition around a shared vision for the future of tourism in the destination. Trailblazer organizations, however, need to be concerned with becoming complacent since travel and tourism is such a highly competitive marketplace.

The takeaways from the DestinationNEXT assessment aligned with comments during the community engagement process, including the many extensive interviews, town halls, focus groups and facilitations.

**Overall, the primary opportunities and challenges culled from the DestinationNEXT assessment are:**

### Top Opportunities

- Continue to develop a more targeted and comprehensive strategy to develop more high-value meeting business.
- Collaborate more intentionally with a broader spectrum of local communities to inform destination development.
- Provide greater support for organizations developing new public and multi-modal transportation.
- Expand the destination brand to be more community-driven and evolve it to embrace technology, innovation and sustainability.

### Top Challenges

- Local organizations and academic institutions need more support to improve workforce development and retention in Miami-Dade County.
- Need to elevate labor relations environment by urging industry to advocate for higher-quality work environments.
- Industry needs to elevate hospitality culture locally to improve Greater Miami’s reputation for customer service.
- A greater cross-section of local communities must be engaged more significantly to address some residents’ negative perception of tourism and its impact on quality of life.



MARAVILHA



## SWOT ANALYSIS

A SWOT analysis was performed to review Greater Miami’s major assets and challenges in the travel and tourism industry. The below table identifies the Greater Miami region’s strengths, weaknesses, opportunities and threats as a world-class destination.

 <p><b>S</b> Strengths</p>	<ul style="list-style-type: none"> <li>» Globally recognized name brand and highly desirable destination worldwide</li> <li>» 3rd busiest international U.S. airport, strong nonstop service to North America, Europe, Latin America/Caribbean</li> <li>» Strong multicultural experiences, offerings, people and natural assets/geography position Miami as unique</li> <li>» Newly reimagined convention center can support more business activity</li> </ul>	<ul style="list-style-type: none"> <li>» Visitors, air travel and population continue to grow</li> <li>» Neighborhood development/improvement has added further diversity to visitor appeal, continues to expand</li> <li>» Natural assets, diverse offerings/experiences are in abundance county-wide</li> <li>» Pioneering resilience and environmental efforts</li> </ul>
 <p><b>W</b> Weaknesses</p>	<ul style="list-style-type: none"> <li>» Poor public transportation options for visitors and locals to access county-wide offerings</li> <li>» Inconsistent/poor customer service level</li> <li>» Image/perception of Miami is a party/nightlife market only</li> <li>» Numerous decision makers/authorities slows progress of key infrastructure development/ issues that support tourism (trolley system, rail/transit, workforce development, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>» Understanding of the benefits/value of tourism and the visitor economy are inconsistent and generally lacking among decision makers and public</li> <li>» Airport as the primary visitor entry point provides no “sense of place” showcasing the variety of offerings and lacks a welcoming message</li> <li>» High cruise volume of visitors seems underleveraged to grow visitors across Greater Miami</li> </ul>
 <p><b>O</b> Opportunities</p>	<ul style="list-style-type: none"> <li>» Considerable amount of varied experiences/ offerings exist county-wide; promoting and developing awareness will attract and build new visitor segments</li> <li>» Newly reimagined MBCC and completion of HQ hotel (2023/2024) enables larger group conferences/events to take place – elevates Miami’s competitiveness</li> <li>» Promote centers of excellence – even emerging niches like tech, medical tech and resiliency when targeting new business conferences/events</li> </ul>	<ul style="list-style-type: none"> <li>» Water transportation could provide a unique, appealing form of access to locals and visitors</li> <li>» Leverage the large Florida population (21MM) and appeal to state visitors focused on programs that attract this important segment</li> <li>» Be the source of information for locals about happenings/offerings county-wide and visitors [new/increased] will follow</li> <li>» Culinary, culture, music and art scene county-wide is underdeveloped and could be leveraged</li> <li>» The nascent organic farming and agri-tourism segment should be promoted</li> </ul>
 <p><b>T</b> Threats</p>	<ul style="list-style-type: none"> <li>» Negative perceptions of danger/crime, high prices, poor customer service levels</li> <li>» Solutions for improved transportation/access for visitors and locals to experience county-wide offerings appear stalled</li> <li>» Local support for mega events is low because they can inconvenience residents; further developing this segment will be difficult</li> <li>» Low awareness of county-wide offerings/ experiences among visitors and locals</li> </ul>	<ul style="list-style-type: none"> <li>» Protecting natural assets and ensuring sustainability (economic, social and environmental)</li> <li>» Access to pedestrian and bike-friendly areas are limited and should be grown; focus on the balance of developing tourism and preserving local quality of life</li> </ul>

## ASSET MAPPING

Asset mapping exercises were part of the focus group process. Following are the major opportunities and gaps that were identified for each of the asset clusters, including:

1. **Accommodations, meetings and conventions**
2. **Arts and culture**
3. **Attractions, events and neighborhoods**
4. **Dining, nightlife and shopping**
5. **Sports, outdoor recreation and medical**
6. **Transportation and connectivity**

## ACCOMMODATIONS, MEETINGS AND CONVENTIONS

### Current Major Opportunities

- ▶ Educate guests about all accommodation options for all types (luxury/budget, etc.)
- ▶ Educate meeting planners that Miami has many neighborhoods, in addition to beaches
- ▶ Create larger awareness of Miami's broad range of independent hotels
- ▶ Conversion of business trips to leisure/bleisure
- ▶ Further leverage attractions during free time for delegates

### Current Major Gaps

- ▶ Not enough convention space for smaller events with hotel
- ▶ Need to expand hotel offerings throughout all communities
- ▶ More affordable hotel options in the western part of the community
- ▶ Being more accessible for physically impaired guests



- *Leverage and promote new convention center and HQ hotel*
- *Expand meetings to underutilized venues*
- *Create a comprehensive curated guide to what to do in Miami; currently confusing with so many options in hotel rooms*
- *Develop special offers for convention delegates by showing badge at retailers/restaurants*

## ARTS AND CULTURE

### Current Major Opportunities

- ▶ Showcase and promote art in all neighborhoods, expand knowledge past Wynwood/Art Basel
- ▶ Leverage existing arts and culture assets such as Adrienne Arsht Center & Frost Museum
- ▶ Better define and identify cultural assets
- ▶ Connect food and beverage culture links (ex: beer culture/Octoberfest)
- ▶ Evolve Found in Miami
- ▶ Connect Art & Tech

### Current Major Gaps

- ▶ Historical aviation museum
- ▶ Central website with upcoming cultural events
- ▶ Social media display
- ▶ Jazz festival/venue
- ▶ More galleries of exhibits for African-American artists
- ▶ Children's activities



- *Share stories of innovation in grassroots arts community*
- *Highlight legacies and history of arts: Lyric Theater, Olympia Theater, Grove Playhouse, Colony Theatre*
- *Art/Cultural leader should create momentum to develop through funding support*
- *Create a city pass for arts and culture activities*
- *Appoint local ambassadors to showcase uniqueness of local museums and theaters*

## ATTRACTIONS, EVENTS AND NEIGHBORHOODS

### Current Major Opportunities

- ▶ Continue to promote major upcoming events to be hosted in Greater Miami (Super Bowl)
- ▶ Leverage and promote existing attractions and events across the region: South Beach Wine & Food Festival, Homestead Stone Crab & Seafood Festival
- ▶ Refine specific events to be more high-end (Fashion Week, Swim Week, Art Basel)
- ▶ Leverage art deco tour
- ▶ Promote all neighborhoods throughout Miami-Dade County

### Current Major Gaps

- ▶ Event specific and unique to Miami (i.e. Amsterdam Tulips)
- ▶ Vid-Con / Comic-Con event
- ▶ More logistics events
- ▶ Cohesiveness among groups behind events
- ▶ Architecture tour
- ▶ Utilize water taxis as an attraction
- ▶ More newsletters/event calendars
- ▶ Affordable price points for children/family events



- Create detailed transportation plans during major events, providing shuttles, parking and detour information
- Educate other sectors about ongoing events
- Educate locals via social media
- Capitalize on indoor event options such as rock climbing, skydiving simulation (to avoid heat)
- Develop a Found in Miami or It's So Miami Museum
- Coordinate with ambassadors or influencers to put events on the map via messaging

## DINING, NIGHTLIFE AND SHOPPING

### Current Major Opportunities

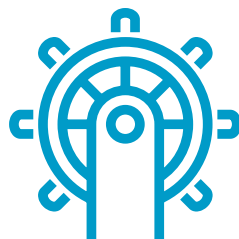
- ▶ Unique local agricultural food products
- ▶ Expanded marketing of Design District and its shopping, music
- ▶ Highlight shopping – what local high-end product can people buy that says "Miami?"
- ▶ Focus on smaller/unique shopping experiences with historical/cultural elements

### Current Major Gaps

- ▶ Steady live music schedule
- ▶ Waterfront dining/venues
- ▶ Poor service levels, more training for staff
- ▶ Public access to Coral Gables waterways
- ▶ Parking availability
- ▶ High drink and food prices, more price points
- ▶ Not just an adult destination, need family-friendly options



- Highlight businesses, restaurants and the people behind them – focus on connecting merchants with the community (ex: Red Rooster)
- Educate group business about Miami Temptations programs (i.e. Miami Spice, Spa Months)
- Increase interaction with locals so they can promote GMCVB programs



## SPORTS, OUTDOOR RECREATION AND MEDICAL

### Current Major Opportunities

- ▶ Highlight watersports options
- ▶ Leverage eco-tourism and outdoor opportunities with nearby assets such as Everglades & Biscayne national parks
- ▶ Promote existing and upcoming sports facilities (Hard Rock Stadium, Freedom Park, Marlins Park, etc.)
- ▶ Develop Underline events & activities

### Current Major Gaps

- ▶ Cluster of sports facilities with entertainment district
- ▶ Bike-friendly roads
- ▶ Beach water-quality concerns



- Maximize university sports programs/youth programs to drive tournaments and highlight sports medicine
- Promote world-class medical facilities and procedures, and attract medical/wellness conventions

## TRANSPORTATION AND CONNECTIVITY

### Current Major Opportunities

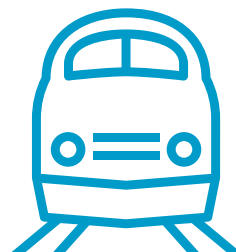
- ▶ Make awareness of transportation options more user friendly for visitors
- ▶ Planning for road construction disruption so visitors are not discouraged
- ▶ Strong promotion of Brightline/Virgin Trains for visitors and general public
- ▶ Connect heritage/minority communities with public transit options (eco-friendly) – more/free so visitors are aware/see all neighborhoods/faces of Miami

### Current Major Gaps

- ▶ Direct link between mainland and beach
- ▶ Rail/transit line between Doral-Airport-Miami Beach
- ▶ Better pedestrian infrastructure
- ▶ More shuttles to/from events and conventions
- ▶ I-95 express buses
- ▶ Water taxi system



- Develop a 1-pass program for visitors to use on various transportation options
- Increase collaboration and planning between agencies for major events
- Develop work from home, rideshare, and parking incentives to alleviate road congestion
- Expand current trolley routes to new/growing points of interest (Overtown, etc.)



# MAJOR FINDINGS

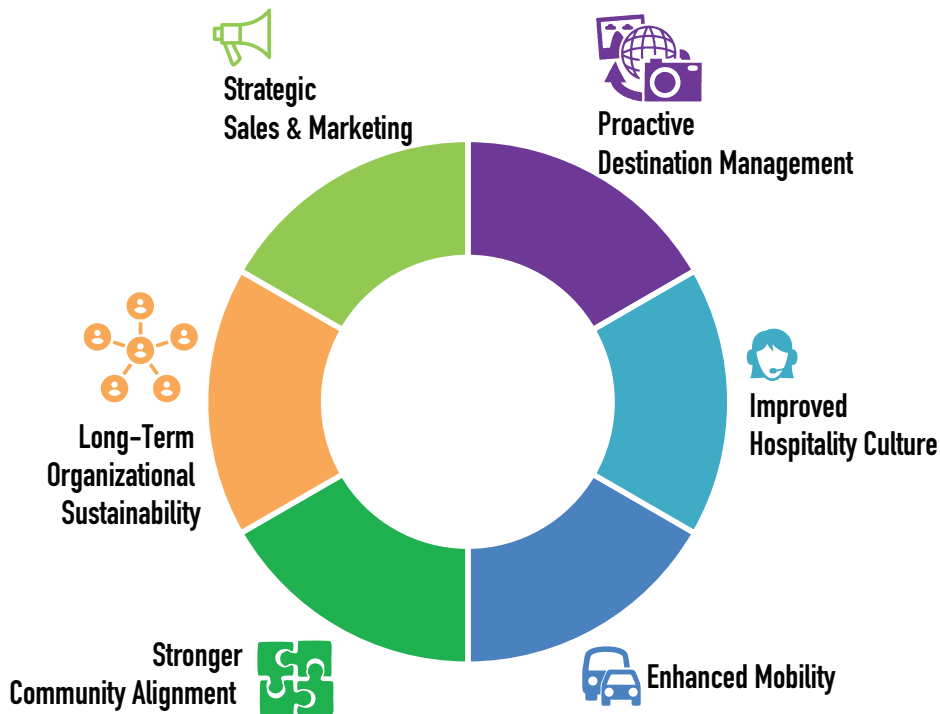
The following 10 findings are the primary broad themes that anchor the Greater Miami Strategic Plan:

- 1. Greater Miami is starting with a strong base of tourism assets, with major transformative developments on the horizon.**  
Recognized worldwide, the GMCVB's inventory of iconic imagery should further expand to county-wide offerings and experiences with all of the new infrastructure developed during the last decade.
- 2. County-wide collaboration and local community support must be improved to permit growth.**  
The GMCVB should elevate its partnerships with key stakeholders to push initiatives and educate the public about the economic benefits of the visitor economy and mega events.
- 3. Greater Miami's unique diversity and culture must continue to be developed and promoted.**  
Visitors want bespoke experiences. Greater Miami is one of the most diverse destinations in the world, which should be promoted across a broader spectrum of community organizations, events and neighborhoods.
- 4. Some perception issues should continue to be addressed (safety, sun and fun image).**  
Perceptions of security/safety, high cost, party town, etc., should be combatted with more positive images and specific messaging using a wider array of respected local ambassadors.
- 5. Economic development and tourism promotion should be more closely aligned with key sectors.**  
The tourism industry should collaborate with economic development agencies, chambers of commerce, civic/cultural organizations and academia within a more structured framework to inform sustainable and equitable tourism development direction, leveraging Greater Miami's industry cluster strengths.
- 6. Greater Miami's position as a resilience pioneer should be leveraged.**  
The public and private sectors across Miami-Dade County should collaborate with resources and tie assets together more cohesively to position the destination as a global leader in resilience, encompassing economic, social and environmental sustainability, led by the Resilient305 framework. The resiliency initiatives Miami-Dade County has undertaken in the last five years provide an opportunity for Greater Miami to drive competitive advantage for decades to come.
- 7. A cohesive Convention Center District strategy is required to capitalize on potential opportunities for meetings and conventions.**  
The new Miami Beach Convention Center and approved Headquarter Hotel, along with adjacent amenities, should be further developed and promoted as an integrated convention center district to help sell a more layered, turnkey experience to meeting planners and event organizers.
- 8. Further develop the regional Florida inbound market.**  
In-state Florida visitors provide a massive market to target, especially with the continued development of Brightline/Virgin train service. This can especially boost tourism in communities outside the main hospitality corridors. Florida has a population of 21 million and is expected to be the fastest growing state through 2030. This large visitor market should be further leveraged.
- 9. Customer service should be further prioritized.**  
The GMCVB should lead the development of an expanded hospitality training program in collaboration with all existing hospitality and university/college programs to improve customer service. Convention services should also be expanded to capitalize on future opportunities.
- 10. Transportation and mobility issues need to be addressed.**  
The GMCVB should be a strong advocate for new mobility options and support city and county officials striving to improve mobility and access throughout Miami-Dade County, as well as adopt innovative technology to help support these improvements. Greater mobility equals greater opportunities for local residents and business owners.



# STRATEGIC GOALS & INITIATIVES

To accomplish the GMCVB’s new vision and mission, six critical goals need to be achieved within the next five years. The goals were developed from the information gathered during the community engagement efforts and defined during sessions in August 2019 with the GMCVB’s senior management team and Board of Directors.



Under each goal, initiatives will either be led or supported by the GMCVB. Examples below indicate role responsibilities. There is also a timeline for each initiative to guide planning from the short- to long-term.

GMCVB Role	Definition	Example
Lead	<ul style="list-style-type: none"> <li>Own initiative</li> <li>Provide resources</li> </ul>	<ul style="list-style-type: none"> <li>Spearhead new customer service program</li> </ul>
Support	<ul style="list-style-type: none"> <li>Be a catalyst to assemble key stakeholders to move issues forward</li> <li>Build dialogue to connect and update partners on the initiative</li> <li>Provide supplementary resources</li> </ul>	<ul style="list-style-type: none"> <li>Engage in initiative with industry to inform hospitality workforce development</li> </ul>







## STRATEGIC SALES & MARKETING

An expanded sales and marketing strategy should focus on diversifying the Greater Miami brand in alignment with the destination’s evolution in both the leisure and meetings sectors. This includes developing digital engagement that encompasses a broad spectrum of partners throughout the county.

Initiative	GMCVB Role	Timeline		
		Short	Medium	Long
a) Update and diversify the Greater Miami brand to deliver a fully developed global community narrative.	Lead		X	
b) Develop a Florida visitor campaign with regional partners customized to local in-state markets.	Lead	X		
c) Further develop a meetings sales strategy leveraging key economic sectors to target high-value events in tech, medical, finance, creative, resiliency, etc.	Lead	X		
d) Partner with regional and global digital, media and entertainment companies to exploit tech platforms (AI, AR, esports, etc.) that drive higher engagement and conversion.	Lead	X		
e) Further develop sports and wellness tourism by partnering with local teams and relevant organizations to attract new events and engage new market segments.	Lead		X	
f) Build deeper relationships with travel professionals to expand pre/post cruise market and capture more cruise industry events.	Lead	X		
g) Further develop Asia-readiness program.	Lead	X		
h) Increase in-house hotel group business lead generation and target right-sized events for MBCC.	Lead	X		
i) Evolve the Multicultural Tourism and Development effort.	Lead		X	

Short is defined as between 1-2 years; Medium is defined as between 3-4 years; Long is defined as 5 years and beyond.



## PROACTIVE DESTINATION DEVELOPMENT

There are significant opportunities for expanded collaboration among the GMCVB and local economic development agencies and community organizations to leverage their collective assets, knowledge and networks more strategically.

Initiative	GMCVB Role	Timeline		
		Short	Medium	Long
a) Align economic, community, and tourism development around a shared sustainable vision for Miami’s future.	Support		X	
b) Support iconic community improvement initiatives with organizations (i.e. BIDs, DDA, CRAs, etc.) to elevate visitor experience and brand image.	Support	X		
c) Collaborate with arts, cultural, civic and academic organizations to develop an inclusive creative industry cluster, event series and ambassador program.	Lead	X		
d) Expand awareness of resiliency initiatives such as Resilient305.	Support	X		
e) Cluster smaller cities together to develop regional sub-brands/campaigns around their collective assets.	Lead		X	
f) Develop segment-specific 1-3 day travel itineraries to disperse visitors county-wide.	Lead	X		
g) Elevate role in attracting mega consumer events by convening local leaders in different sectors to liaison with their global networks.	Lead	X		
h) Leverage new port of call opportunities to increase volume of non-home-port ships.	Lead	X		
i) Develop a new luxury, fashion and retail platform to further elevate Miami as a global capital at the forefront of lifestyle trends.	Support		X	

Short is defined as between 1-2 years; Medium is defined as between 3-4 years; Long is defined as 5 years and beyond.



## IMPROVED HOSPITALITY CULTURE

Quality customer service is paramount in the global visitor economy, and destination organizations need to ensure that the level and spirit of hospitality in the region answers the demands of modern travelers. It is critical for the GMCVB to lead new customer experience training and workforce development initiatives for partners all across Miami-Dade County. The GMCVB's Miami Begins with Me Training and Customer Service Program launched several years ago. More than 60,000 individuals have graduated from the program including representatives of Miami International Airport, PortMiami, taxi and transportation companies, hotels, attractions and other tourism-related businesses. The customer service program will build upon the successes so far and significantly expand the program moving forward.

Initiative	GMCVB Role	Timeline		
		Short	Medium	Long
a) Implement next-generation customer service experience training for hospitality sector in collaboration with academia, industry, ambassadors and "Miami Proud" elements.	Lead	X		
b) Work with hotel association to advocate for more diversity in senior management and develop workforce development programs and certification programs for underserved communities.	Lead		X	
c) Collaborate more intentionally with academic and trade hospitality schools to support a more relevant talent pipeline.	Lead		X	
d) Further develop middle and high school initiatives that expose Miami's youth to the variety of careers available in hospitality.	Support		X	
e) Pursue partnership with Career Source South Florida, National Academy Foundation (NAF), Hospitality Employees Advancement & Training (HEAT), Overtown CRA, etc. to develop a subsidized hospitality apprenticeship program.	Support	X		
f) Further develop/update long-term framework for industry workforce development based on more effective alignment among government, industry and academic institutions.	Support			X

Short is defined as between 1-2 years; Medium is defined as between 3-4 years; Long is defined as 5 years and beyond.



## ENHANCED MOBILITY

Mobility is key to moving visitors around to explore more of Greater Miami. Promoting greater dispersal of visitors and their spending is important to regional economic growth throughout other parts of the destination. Better mobility also provides the local workforce more efficient access to jobs. There are high-level strategies underway to improve transportation throughout Greater Miami, including the comprehensive Miami-Dade SMART multi-modal mobility plan. The GMCVB's partners are eager to understand how this long-range planning will impact their operations.

Initiative	GMCVB Role	Timeline		
		Short	Medium	Long
a) Collect and share all of the different community transportation plans, and support implementation with visitor data.	Support		X	
b) Collaborate more effectively with city and county transportation officials to advocate local, state and federal government for expanded funding.	Support			X
c) Collaborate with MIA to develop a better visitor experience and improved destination messaging.	Support		X	
d) Advocate for more efficient transportation access for hospitality workers county-wide. Develop incentives with partners (employers, hotels, restaurants, hotel developers) to include ridesharing credits.	Support	X		
e) Support the development of new mobility innovations to enhance walkability, bikeability and non-motorized connectivity.	Support		X	
f) Begin planning for the rollout of fully autonomous vehicle systems in 3-5 years.	Support			X
g) Develop more comprehensive online materials to help visitors and locals navigate the county without single occupancy vehicles.	Lead	X		

Short is defined as between 1-2 years; Medium is defined as between 3-4 years; Long is defined as 5 years and beyond.



## STRONGER COMMUNITY ALIGNMENT

As the visitor economy grows, it's imperative for the GMCVB to elevate its local community advocacy to ensure civic organizations and residents understand the value of leisure travel, meetings and conventions and large events. The economic benefits of tourism are essential to the prosperity of local communities. By generating taxes, driving economic development and sustaining jobs, tourism improves residents' quality of life. Community members across the county are eager to participate in the development of their neighborhoods, but they don't necessarily feel they have a platform to participate.

Initiative	GMCVB Role	Timeline		
		Short	Medium	Long
a) Expand messaging about economic benefits of tourism to elected officials to include community building and equitable opportunity.	Lead	X		
b) Expand local education of residents on the economic and social benefits of the visitor economy.	Lead	X		
c) Expand resident sentiment surveys to gauge the visitor economy's impact on local quality of life; include resident sentiment as primary key performance indicators.	Lead	X		
d) Collaborate with businesses, non-profits, economic development organizations, academic institutions and government as an incubator to stimulate new Greater Miami-based businesses.	Support		X	
e) Invest time and resources to support the transformation of heritage neighborhoods as beacons for inclusive community tourism development.	Lead		X	
f) Regulate short-term rentals and collect taxes where legal to protect Greater Miami neighborhoods.	Support	X		

Short is defined as between 1-2 years; Medium is defined as between 3-4 years; Long is defined as 5 years and beyond.



## LONG-TERM ORGANIZATIONAL SUSTAINABILITY

The GMCVB has been effective as a catalyst for visitor and economic growth during the last several decades. However, there is increasing competition for consumer dollars as the global visitor economy grows every year, with emerging and existing destinations investing heavily in their infrastructure and visitor experience. The following initiatives are designed to ensure the continued success of the organization over the next few decades.

Initiative	GMCVB Role	Timeline		
		Short	Medium	Long
a) Ensure that the GMCVB is effectively funded over the long-term to deliver on its expanded role.	Lead	X		
b) Embrace global evolution from destination marketing to destination stewardship. Establish new rules of engagement with government, industry and community.	Lead		X	
c) Generate greater synergies and foster diversity and inclusivity within the GMCVB.	Lead	X		
d) Develop senior management succession plans.	Lead	X		
e) Expand focus on Board composition and leadership, and define responsibilities to support specific goals/initiatives.	Lead	X		
f) Consistently review organizational structure to reflect evolving roles.	Lead	X	X	X

Short is defined as between 1-2 years; Medium is defined as between 3-4 years; Long is defined as 5 years and beyond.



# APPENDICES

## COMMUNITY ENGAGEMENT FEEDBACK

Following is a detailed summary of the key themes and suggestions discussed during the many various community engagement sessions across Miami-Dade County.

## ONE-ON-ONE INTERVIEWS

More than 85 interviews were conducted with a diverse group of key constituents throughout Miami-Dade County (Jan.-Jul. 2019) with comments recorded. Participants included a variety of stakeholders that support, rely on and develop policy for the visitor economy.

### Participants included:

- Elected decision makers
- Hotels, restaurants and retail
- Attractions, entertainment, sports
- MBCC and users
- GMCVB leadership
- Business Improvement Districts (BIDs)
- Major events/conferences
- Cruise companies
- Developers/investors
- American Airlines
- Economic development organizations and chambers of commerce
- Academia – colleges/universities
- Transportation, airport and seaport

Their feedback below has been integrated into the overall strategic plan and initiative development.

### Sales & Marketing

- Integrate more sales and marketing efforts with hotels.
- Highlight resiliency excellence to attract meetings/conventions.
- Invest more resources in digital efforts to attract younger market segments.
- Leverage sports town image; increase engagement with key stakeholders to attract events.
- Expand brand image; focus on expanded themes/activities particularly in art, culture, music, food, sports.
- Develop group sales in a more focused effort.

### Destination Development

- Promote variety, including positioning outdoor/nature experiences more prominently.
- Promote the variety of diverse experiences in South Dade more aggressively.
- Build a shopping campaign around Miami as a fashion leader across all price points, particularly luxury.
- Partner with restaurants to develop programs county-wide.
- Develop incentives for cruise/travel trade to extend passenger stay.
- Support development of more Port of Call activity.

### Customer Service/Hospitality Culture

- Improve inconsistent customer service levels.
- Develop an ambassador program to promote customer service; foster pride in Miami among locals.

## Transportation/Mobility

- Promote connectivity improvements and expand relationships with different stakeholders.
- Collaborate with stakeholders and develop transportation plans for mega events to help locals and visitors.
- Support initiatives that are expanding mobility opportunities, and promote appeal of those for locals and visitors.

## Community Alignment

- Elevate awareness of resiliency efforts that cities and the county are implementing.
- Partner with Miami-Dade County Public Schools and Career Source South Florida to build hospitality career apprenticeship programs.
- Collaborate with sports organizations to “give back,” i.e. youth leadership inclusion, scholarship development, etc.
- Educate community more about the visitor economy’s value and benefits locally, especially conferences and events.
- Engage more with locals; develop an annual local day county-wide.
- Increase support from chambers of commerce for tourism and key issues like transportation.

## Organizational Sustainability

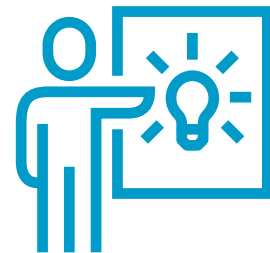
- Develop a plan for executive succession.
- Develop a course of action for how to address the changing climate.
- Invest in staff and programs focused on greater inclusion.

## FACILITATED SESSIONS

Eight facilitation meetings were held from December 2018 to June 2019 with key tourism stakeholders. Participants included various GMCVB committees, GMCVB leadership and a city and county management association. Ideas, major discussion points and prioritized key comments have been considered for input into the overall strategic plan and initiative development.

### Committee Meetings

- GMCVB Management Team – December 21, 2018
- Marketing Committee – January 15, 2019
- GMCVB Board of Directors – January 28, 2019
- Multicultural Committee – March 21, 2019
- Convention Sales and Hotels – April 29, 2019
- Boutique Hotel Committee – May 9, 2019
- Miami-Dade City/County Management Association – May 17, 2019
- Cultural Tourism Committee – June 25, 2019



### GMCVB-Related Feedback

- Improve customer experience training county-wide; use ambassadors.
- Maximize and develop international events, especially in MBCC/HQ hotel’s low season.
- Collaborate with partners to promote all that Miami offers, and segment strategically around family, culinary, culture, nature, health/wellness, “bleisure,” etc.
- Educate hotels/concierges about up-to-date county-wide offerings.
- Develop user-friendly technology providing personalized information to help visitors plan trips.
- Help change perception (safety, security, high price) by showing more positive imagery and editorial content.
- Support workforce development issues.
- Ensure tourism funding support is consistent, and fight perception that tourists “come anyway.”
- Support county/city initiatives to provide improved transportation.
- Serve as the primary source of destination information for visitors and locals.
- Engage in strategic partnerships with economic development agencies.
- Attract right-sized business events, not just MBCC-sized meetings.

## Destination-Related Feedback

- Support the development of a more welcoming MIA airport experience for visitors; increase air service.
- Promote Miami's evolution as a destination and its diverse offerings.
- Arts and culture are underpromoted.
- Support more multicultural neighborhood expansion.
- Encourage more sporting events and exploration in Miami county-wide.
- Environmental stewardship is important to maintain natural water and land assets.
- Promote eco- and agritourism, outdoor activities, two national parks.
- Elevate welcoming spirit for a wider array of diverse communities.

## FOCUS GROUPS

Four Focus Group meetings were held from January to May 2019 with nearly 90 key stakeholders. Participants included various constituents in hospitality, economic development, business, technology and real estate. Ideas, major discussion points and prioritized key comments have been considered for input into the overall strategic plan and initiative development.

### Focus Group Meetings

- Hospitality – January 30, 2019
- Tourism Business Enhancement Program – March 19, 2019
- Business/Economic Development and Real Estate – May 7, 2019
- Technology/Millennial – May 9, 2019

## GMCVB-Related Feedback

- GMCVB should lead the effort to improve customer service levels; develop ambassador program.
- Educate locals about tourism value, including mega events.
- GMCVB should lead facilitation efforts for transportation planning of mega events.
- Focus on positive, unique elements that bring people together, including as an incubator for high tech, medical tech, arts, culture, cuisine, sports, music, etc.
- Leverage GMCVB website for time-specific travel/itinerary planning (i.e. 24 hours, 3 days, 7 days).
- Focus on local residents and events so GMCVB becomes the nexus of information that visitors will want to follow.
- GMCVB to formalize strong support role to help educate locals and visitors about transportation improvements.

## Destination-Related Feedback

- Rebrand, reposition, re-message Miami image to highlight diverse offerings/experiences.
- Convert millennial visitors to residents; attract young talent to stimulate economic development.
- Host/attract more international events like World Cup; use Calle Ocho as a model.
- Utilize smaller, unique, intimate venues for business meetings and events.
- Greater Miami's resiliency efforts during the past five years should be embedded into messaging to visitors.
- Combat negative perception issues relating to safety/security.
- Airport is the initial visitor access point so there's a need to improve its welcome message, showcase diverse experiences, etc.







## TOWN HALL TAKEAWAYS

- Agritourism in South Dade is relatively unknown; push to elevate this unique activity.
- Link sports with local communities county-wide to help attract new events, such as Miami Lakes (baseball), Doral (tennis/golf), Homestead (speedway).
- Miami International Airport is the first and last message from the destination and lacks the best images of the unique, varied offerings/experiences.
- Spread the wealth/opportunity of the tourism business county-wide so it's good for all and supports equitable economic development.
- Showcase cuisine county-wide, including its depth and breadth of authenticity, quality, multicultural appeal, etc.
- Leverage the Miami brand to promote diverse, multicultural neighborhoods, music, cuisine, art, etc.
- Focus on locals and their perspectives; inform them about numerous weekly events/happenings county-wide; visitors will follow.
- Support improvements in transportation, access, parking.
- Leverage parks, highlight two national parks and multiple local parks to all visitors.
- Develop a concierge co-op to educate, inform and promote county-wide experiences/offerings.
- Build on the Miami305 initiative, the resiliency movement happening in Miami since 2015.
- Elevate the awareness of health and wellness tourism and the numerous offerings that exist year-round.
- Construct a new customer service program to combat the low-level experience for visitors; develop an ambassador program to enhance the effort.
- Campaign for earlier education exposure in schools to hospitality sector careers (Career Source South Florida, etc.).
- Educate about benefits/value of tourism to locals and decision makers for support with mega events.
- Need to address workforce development issues for long-term sustained tourism business in Miami-Dade County.
- Outdoor experiences, aquatic adventures, geographic diversity and physical activities need greater awareness.
- Build a hospitality community effort/campaign of Miami-Dade County offerings/experiences.
- Engage in community building; educate, train and provide opportunities for more residents and small businesses.
- Educate residents about the value/benefits of tourism and the GMCVB's inherent role.
- Promote eco-tourism.
- Elevate level of regional collaboration for major events to show the world and locals that Miami deserves more (Super Bowl, National Championships, World Cup).
- Promote Virgin/Brightline rail service to Florida visitors.
- Advocate for all neighborhood development to be inclusive.
- Focus on attracting events that bring people together around experiences they have in common – a love for music, food, sports, arts/culture, etc.
- Promote resiliency in all efforts.
- Focus on locals, engage them, provide information and be the lead source for all events and happenings; visitors will follow.
- Need to be able to serve Asian visitors; provide business-ready information/education.
- Develop a more enhanced customer service program taking Miami-Dade to the next level; tap local academia and create ambassador support to help promote pride in Miami.

## COMMUNITY FEEDBACK SUMMARY

### Transportation & Mobility

- Engage on behalf of hospitality workforce development and visitors on improvement efforts/solutions.
- Collaborate with Miami International Airport to develop a more welcoming visitor message, better sense-of-place visuals, highlighting diverse county-wide offerings.
- Work with Miami-Dade County's transportation department to help improvement initiatives and attract/promote meetings/events around transportation innovation.
- Educate and raise awareness of transportation improvements/innovations coming near-term.

### Cruise

- Strengthen partnership initiatives with industry to extend visitation in Miami-Dade County.
- Expand Port of Call opportunities.
- Capture industry meetings/events.

## Destination Development

- Continued expansion of new areas/redevelopment county-wide.
- Elevate promotion of Miami-Dade County diversity (art/culture, food, music, nature/outdoor, etc.).
- Develop itineraries for visitors (1 day, 3 day, etc.).
- Stimulate economic development activity through conferences/meetings, film incentive development, etc.
- Environmental resiliency/sustainability, beach preservation.
- Transportation improvement/innovation.
- Proactive role in mega event planning and strategic targets.
- Focused campaign on Florida visitors.
- Focus on issues that benefit locals (transportation, mega event prep) and are good for visitors.

## Sales & Marketing

- Target right-sized events for MBCC/hotel availability.
- Provide comprehensive support for Downtown World Center project (once plans are finalized).
- Increase in-house hotel group business lead generation.
- Evolve and update the Greater Miami brand; expand its diverse image.

## Customer Service/Hospitality Culture

- Lead a next-generation customer service experience program to include academia and industry, ambassadors and promotion of pride in Miami.
- Collaborate on an education program with all local academic hospitality institutions.

## Community Alignment

- Increase and elevate the economic benefit message of tourism (business and mega events, leisure tourism) to elected officials/decision makers.
- Focused, county-wide and ongoing campaign to educate residents about the economic benefit of tourism and GMCVB's role to enhance position.
- Support re-attraction of film incentives to regain lost business.
- Collaborate with key chambers, Beacon Council, Knight Foundation, Florida Enterprise, Visit Florida etc., to develop strategic targets and tactics to attract key meetings/events that stimulate new Miami-based business/develop employment opportunities for local college/university graduates to stay.

## Organizational Sustainability

- Improved communication
- Diversity and inclusion
- Senior management succession
- Promote further board diversity

## Workforce

- Pursue partnership with Career Source South Florida; develop a subsidized hospitality apprenticeship program (federal matching funds).





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