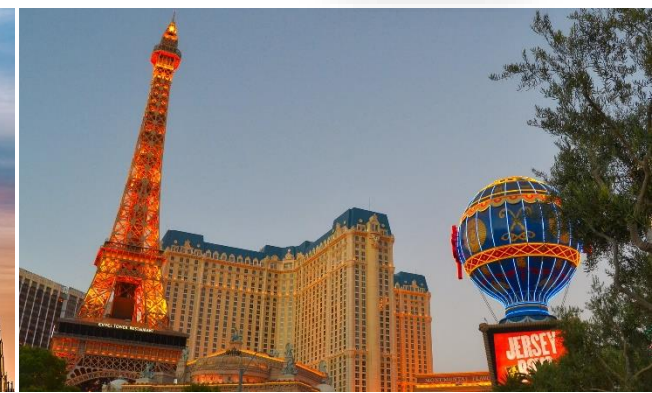




Tourism Futures

Thinking differently in the new dynamic.

John Boulding
CMO



Agenda



Vox Group



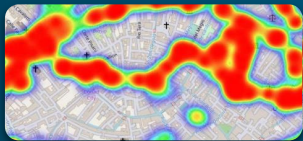
The new dynamic



Digital developments



New opportunities



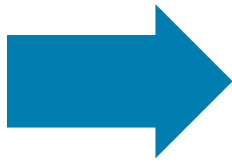
Data and trends



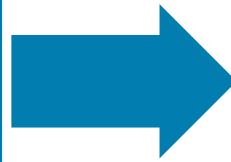
Conclusion

Bringing innovation to the global recovery.

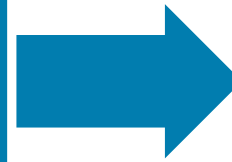
55
offices
worldwide



15
million
guests



27
million
audio tours



5500
business
partners



Tour guide
systems



Smartphone
guiding/venues



Storytelling &
content creation



Venue
management

“The pandemic has been a major ‘reset’, so we need to think differently.”



Tourism challenges

Government

Guiding
practices

Timed
entrances

Pedestrian
zoning

High fixed
overheads


Limited
capacity

Fewer
visitors

Permit
limits

ULEZ
zones



A photograph of a museum gallery with glass display cases and artifacts. The text is overlaid on the image.

Top 100 museums attendance dropped 77% in 2020

230,000,000 to 54,000,000

Movement of in-person experience over year after first lockdown:





The 'Conscious Traveller'

- Needs, preferences & priorities shifted
 - More personal and flexible
 - Build on new interests
 - Take advantage of newly acquired tech skills
 - Aware of the world around them
- Newly-learnt behaviours become habitual



Digital opportunities

- Turn moments into experiences
- Make storytelling more effective
- Complement not replace
- Don't have to go it alone!

Smartphones have become the great disrupter



A man with dark, curly hair and a beard is shown in profile, looking upwards. He is wearing white earbuds and a white collared shirt. The background is a blurred view of St. Peter's Basilica in Rome, with its ornate architecture and a large dome visible. The lighting is soft, suggesting an indoor or shaded outdoor setting.

Tenfold digital increase...

- 5 years ago just 3.5% independent travellers used digital services
- Right now, 35% are self-guiding during visits

Source: St Peter's Basilica, Rome

Smart guiding works

Addresses a wide spectrum of information needs:

- Solves problems
- Shares experiences
- Stores memories
- Is a trusted friend

Changes behaviour and mentality

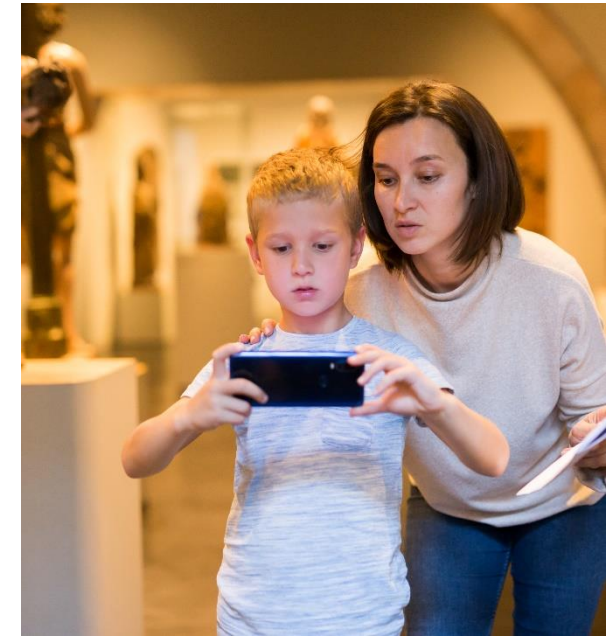


A 3D maze with a blue tint, symbolizing complexity and choice. The maze is composed of white walls and paths, creating a complex network of routes. The perspective is from a slightly elevated angle, looking down into the maze. The walls are of uniform height, and the paths vary in width. The overall image has a soft, ethereal quality due to the blue tint.

But, be careful which platforms you choose...

The best tourism applications can bring a destination or venue alive.





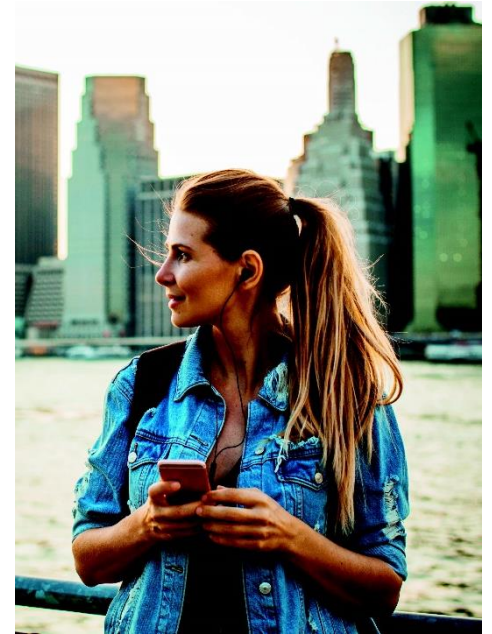
Museums and galleries can provide visitors with their own private guide

- Simplify cultural visits, reduce waiting.
- Better engage visitors, so increase dwell time.
- Interactive screens and beacon technology.



DMOs collect rich data for the benefit of visitors and locals alike.

- Welcome, connect and influence
- Develop new partnerships.
- Better manage tourist flows.



Tour operators can provide high quality multilingual storytelling

- Self-guided walking trails and optional experiences for free-time exploration on which you never get lost
- Bespoke, flexible and fully branded content unlimited by guest numbers



Sightseeing and attractions can better manage international travellers

- Broaden language markets. Resolve logistical issues.
- Create self-guided walking trails and unmissable experiences
- Alleviate pinch-points and improve margins



OTAs and wholesalers can value-add commodities

- Transform commodity products into higher value packages.
- Overcome net ticket pricing and margin issues.
- Transform free entry venues into income generators.

Digital treads lightly

- No additional hardware
- Reduces printed materials
- Optimises tourist flows
- Reduces crowding
- Promotes inclusion
- Educates and engages stakeholders and visitors



Digital and hybrid experiences can help drive your recovery



Motivating and engaging visitors

67%

- Learn something new

52%

- Be intellectually stimulated

53%

- Discover something out of the ordinary

45%

- Be entertained

The future guiding practices are already here...



Now, smartphone guiding for groups.



Smartphone guiding - simple, reliable and effective

- Low data use
- Long range
- GDPR secure
- Covid safe
- Multiple extras





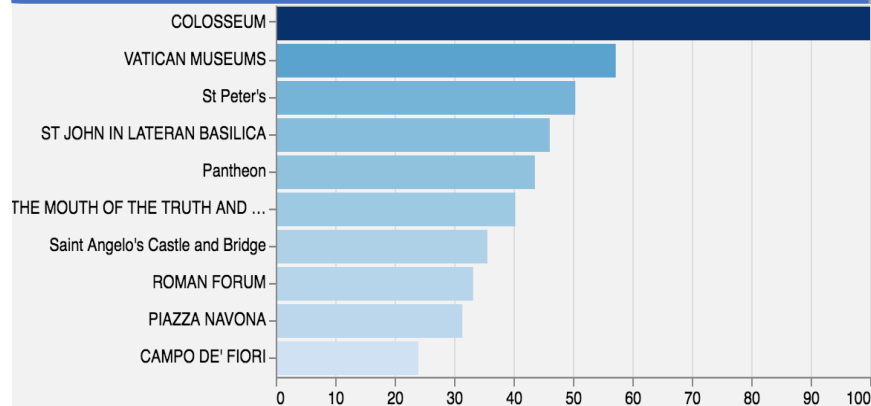
- Huge savings
- No logistic costs

Get big data and trends

HEAT MAPS



RICH DATA ANALYSIS



- **Intention analysis** from in app surveys
- **App store data** from Google and Apple
- **Interactivity data** from GPS and user actions - places visited by language, by time of day, by preference, etc.
- **Heat maps** showing customer interaction with the destination by language, time and area visited

Heatmap Rome: Language

ENGLISH



ITALIAN



FRENCH



GERMAN



SPANISH



CHINESE



Heatmap: Controlling tourism flows



Passetto

The Passetto di Borgo is an overhead turreted wall, dating back to 1277 AD, that stretches 2,600 feet from the Papal Apartments to the Castle of Angels. Upon its completion it was intended to be used as the official escape route for the Popes whenever Rome was sacked and, according to records, has been used twice for this purpose. The name "Passetto" does not mean "passageway" or "escape route", but instead translates to "the little footstep", which refers to the tiny footsteps that the pope is

[Book Saint Peter's Basilica fast-trac...](#)

been so wealthy and powerful
ed their Spanish rulers and established an
blic. Power was in the hands of the burghers. It was
Europe's leading nations, constantly warring with its neighbours
ailed the world's oceans. In the Dutch Republic, products and raw materials
tributed. Merchants amassed fortunes and art and culture flourished.



Conclusion

- New behaviours (habits)
- Many positives
- Plenty of opportunities
- Digital treads lightly
- Complement not replace
- Track your new trends
- No need to go it alone!



There's a bright future

- Don't delay
- Invest time and skills
- Give 100% energy to new opportunities



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