A Strategic Road Map
for the NEXT Generation of Destination Organizations

10TH ANNIVERSARY

DESTINATION NEXT

MMGY NextFactor

DESTINATIONS INTERNATIONAL

Executive Summary

The relationship between destination organizations and their local communities evolved dramatically in many cities and towns globally during the Covid pandemic. Enough time has since passed where destination leaders are beginning to understand what was transitory and what looks to be long-term transformations.

The DestinationNEXT 2023 Futures Study attempts to codify those systemic shifts. It is a strategic roadmap and global survey that helps destination leaders navigate today's highly fluid visitor economy to optimize their organizations' relevance and value.

This is the 10th anniversary of DestinationNEXT, and it represents the largest ever collection of destination organizations coming together to co-create the future of the global visitor economy and the communities they represent. A total of 837 destination leaders from 62 countries participated in this year's survey, who ranked 50 industry trends and 50 strategies for destination organizations in order of relevance and importance.

Within the full scope of data and analysis in this document, there are valuable takeaways to inform strategic decision making for any organization of any size and budget.

The top takeaway this year is that destination organizations are evolving as community leaders more than ever. For CEOs and their executive committees, it represents a shift from their key roles in community relations to community development. For the destination organization, it's an accelerated expansion beyond destination marketing to destination development. Furthermore, the data shows there is a much greater need for more actionable, data-driven business intelligence to collaborate with partners more effectively to support community and destination development efforts.

This evolution is not entirely new, and it's not to suggest that destination promotion is any less important than ever before. However, these shifts toward community and destination development do seem to be approaching a greater critical mass across our industry.

According to this year's survey data, organizations are increasing how they prioritize many different types of supply-side initiatives. Those include: Destination, product and experience development; community and economic development; small business and workforce development; partner support and education; resident engagement and education; workforce housing and childcare improvements, and advocacy to influence local, regional and national policy.

As such, many destination organizations are expanding their overall mandates, but the road forward is unclear. Some of the primary questions that leaders say they have are: "How do we justify our expanded roles to our Boards of Directors and elected leaders? What are the exact key performance indicators and measurable benefits to validate expanding our roles? Where do we find the resources for these expanded roles, and what gets left behind?"

Also, the number one strategy in the 2023 Futures Study is about retaining funding. The major question is how an organization's roles and mandate accomplish that best. That's a big question. In effect, leaders are asking, "If I want to keep our organization's funding at current levels, or increase our funding, what does the organization need to accomplish in our destination and community, which we can prove, to increase stakeholder support for our funding?"

Community & Destination Development

The following sample of survey results highlight the prioritization in community and destination development. For 2023, the top five of 50 trends impacting our industry's future are heavily indexed around how destination organizations are working and aligning with their communities:

1. Artificial intelligence will become increasingly prevalent at an accelerated pace

2. Customers are increasingly seeking a unique, authentic travel experience

3. Communities expect to be more engaged in destination, product and experience development for locals and visitors

4. Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

5. Greater industry, community and government alignment is driving destination competitiveness and brand

Likewise, the top five of 50 strategies for destination organizations prioritize community and destination development:

1. Protect revenue sources to maintain current funding levels

2. Focus on developing authentic experiences for the customer

3. Better integrate tourism and economic development

4. Build the destination brand around the community's goals, values and creative energy

5. Have a greater role in destination and product development

There are many takeaways from the survey that highlight the higher importance of community and destination development today in our industry. The adjacent bullet points provide a high-level snapshot.

- The #2 trend this year is, "Customers are increasingly seeking a unique, authentic travel experience." It was the #2 trend in 2021.

- The #2 strategy is, "Focus on developing authentic experiences for the customer." It ranked #5 in 2021 and #7 in 2019.

- "Communities expect to be more engaged in destination, product and experience development for locals and visitors" rose 27 points to the #3 trend this year.

- "Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts" is the #4 trend this year. It was #32 in 2021.

- "Have a greater role in destination and product development" is the #5 strategy, jumping 15 places since the last Futures Study.

- "Resident sentiment is becoming a key measurement" increased 32 places to the #6 trend this year.

- "There's a greater focus on placemaking to benefit both locals and visitors" is the #8 trend in 2023, rising 20 points in the rankings.

- "Develop a destination master/management plan to define long-term strategy" is the #8 strategy.

(Some of the above numbers showing how much the trends and strategies increased in the rankings from 2021-2023 have been impacted by the change in the total number of each in the last two surveys. In 2021, there were 100 trends and 80 strategies. This year there are 50 each. That said, there were very few trends and strategies removed among the highest ranking.)

Evolving Roles & KPIs

The DestinationNEXT Survey also asked participants to rank their roles and key performance indicators today, and what they anticipate those to be in three years.

Roles

In terms of their roles, destination leaders believe the following will be their top five priorities in the near future. This is the first Futures Study where destination marketing and brand management have not been #1 and #2. Data support for both organizations and their partners is now ranked second. Destination and community development are the other two most critical roles.

1 Destination marketing

2 Data research & intelligence

3 Brand management

4 Destination & product development

5 Community relations & partnership

KPIs

For KPIs in the future, destination leaders identified the following top five measurements. Visitor satisfaction at #2 jumped the highest, surpassing overnight visitation and visitor volume. The data analysis here is a little tricky, but the rise in importance of customer satisfaction suggests destination leaders are prioritizing the need for better consumer intelligence to help improve the visitor experience – i.e., community and destination development.

1 Economic impact of tourism

2 Visitor satisfaction

3 Overnight visitation

4 Marketing ROI

5 Number of visitors/delegates

DestinationNEXT Mandate Map

The data was supplemented with more than a dozen focus groups with the DestinationNEXT 2023 Global Advisory Group, consisting of 60 destination leaders around the world. Those conversations then led to more than 100 individual interviews with leaders in four Advisory Panels assembled for this project, categorized as: Disruptors, Industry, Community and Customers.

The entirety of that qualitative and quantitative research lead to a new 4-quadrant Mandate Map for destination organizations divided by demand and supply-side roles. This is not to suggest that destination organizations are focusing on all four quadrants equally. Rather, the value of the map is to codify evolving roles and mandates based on how our global sector is evolving in parallel with systemic shifts in our communities.

The two transformational opportunities for destination organizations relate to community leadership and technology adoption, which apply to all four quadrants.

DEMAND

Visitor Engagement	**Partner** Support
• Digital storytelling • Brand management • AI marketing • Visitor servicing • Loyalty program	• Data research & business intelligence • Business events • Major events & festivals • Sports • Film, music & culture
Community Alignment	**Destination** Development
• Government relations & advocacy • Sustainability • Equity, diversity, inclusion & belonging • Economic & workforce development • Resident engagement & support	• Product (experience) development • Neighborhood development/placemaking • Air access • Infrastructure development • Accessibility

SUPPLY

Visitor Engagement

Communicating with visitors before, during and after travel continues to evolve with new technologies and best practices. The rise of generative AI provides new tools for customizing sales and marketing efforts from both a brand and content development perspective. Likewise, the growth of short-form video and new blockchain technology are increasingly driving visitor engagement and loyalty.

Partner Support

How destination organizations define "partners" continues to expand beyond traditional industry stakeholders. Today, there's a better understanding about how the visitor economy touches so many aspects of the community. Building and leveraging those networks is key to destination competitiveness. Likewise, there is a much greater prioritization of procuring better business intelligence to better inform partner promotion strategy.

Community Alignment

Collaborating with government, resident groups and nonprofit organizations surged during the Covid pandemic. Destination leaders are eager to maintain and elevate those partnerships, but this takes an enormous amount of effort to accomplish. At the same time, this is arguably where destination organizations have the greatest opportunity to increase visitation and improve destination performance. Today, destination marketing and brand management remain the two primary roles for organizations, but destination leaders state they see community alignment as equally important in coming years.

Destination Development

Many destination organizations are increasingly influencing what the visitor experiences in the region. Destination leaders vary in how much impact they can have on destination, product and experience development, but the data in this year's Futures Study clearly shows a significantly greater prioritization than in previous years. One of the most critical needs related to destination development is a global conversation on what that exactly means, and how best to work with partners to accomplish it effectively.

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Destinations International and MMGY NextFactor would like to thank the members of the DestinationNext 2023 Global Advisory Group, which was established to lead this important industry initiative.

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Hello,

We are proud to share with you the 2023 edition of Destinations International's DestinationNEXT Futures Study. Based on input from hundreds of global destination leaders, the DestinationNEXT Futures Study is the most comprehensive analysis available of the trends and forces that affect destination organizations. We are especially pleased this year to have received input from destination leaders in more than sixty countries, ensuring a truly global perspective to this report, and allowing us to compare the relative impact of specific trends and strategies in different regions of the world.

This year marks a decade of collaboration with MMGY NextFactor. This has been a period of profound change for destination organizations. Rapid social change, disruptive technology, the global pandemic, and ever-evolving traveler preferences have tested nearly every facet of destination organizations' operating models. Through it all, the Futures Study has allowed us to gather data, analyze the trends, and provide actionable insights to guide destinations in their strategic decision-making.

The Futures Study is made possible through the generous support of the Destinations International Foundation. The Destinations International Foundation serves as an "innovator and incubator" for the Association, investing in research and programs that empower our members with the knowledge and tools needed to thrive in the evolving tourism landscape. We extend our gratitude to the hundreds of destination professionals and organizations who donate every year to the Foundation for their investment in future focused research and insights, and their commitment to advancing the destination industry.

It is our sincere aspiration that this report serves as an invaluable resource for you and your team. We invite you to return to it periodically as you navigate the dynamic visitor industry and lead your organization forward.

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Introduction

This year's Futures Study once again involved hundreds of conversations with CEOs in destination organizations of every size and budget around the world. A total of 837 destination leaders in 62 countries participated in this year's survey to rank global trends and industry strategies that are helping define and expand the roles of organizations.

Overall, the Global Advisory Group conversations highlighted how industry leaders are imagining their organizations' mandates are evolving. Most of the CEOs believe their roles and priorities need to continue expanding, but there wasn't always agreement in terms of how.

"Is there any consensus about what our real roles are today?" asked one North American CEO. She emphasized, "We need to put some guard rails around that."

Another suggested, "The success of a region's visitor economy is based on both locals and visitors contributing to community development. That defines our priorities clearly in a way that everyone understands and buys into."

Others objected. One European destination leader said, "No, we don't have the resources to invest in community development." But at the same time, he stated that one of his organization's most important priorities was developing more sustainable tourism in the region. That certainly requires extensive and sustained community building/development across all sectors.

So, a lot of this is semantics.

> **We need a better catalog of labels and language that we agree on, if we're going to try to solve our biggest challenges as a global community.**

A Latin American CEO agreed, saying, "There is not one global language for our industry. We need a better catalog of labels and language that we agree on, if we're going to try to solve our biggest challenges as a global community."

A CEO for a national European tourism organization stated his organization's top three priorities are: government relations, community building and tech innovation. Everything the organization commits to, he said, should start with how the visitor economy benefits residents and small businesses.

He explained, "We place a high priority on shared interests with our communities, versus industry interest. When we first came out with that idea, people thought we were from another planet, but we have been evangelists. Today, we actually see the principles we stand for land in local and regional policy, and the traction with industry entrepreneurs has been great. What we're really doing is building coalition between the visitor industry and everyone else."

A destination CEO in Asia-Pacific added that, for her organization, government relations is the top priority.

"To be effective today, you need depth and breadth in government relations, and that means we have to immerse ourselves in the issues of our community well outside tourism and business events," she said. "We need a seat at a diverse group of tables. That is the #1 thing. That is the catalyst to be seen differently by government. The challenge is there's a lack of leadership globally with that type of broader vision and the will to execute on it."

A lot of CEOs discussed government relations, and new strategies to approach that.

"We need to talk to government in new ways to improve alignment with them," suggested another CEO of an Asia-Pacific destination organization. "Government has typically been told that tourism is so good, and that tourism is creating all these positive impacts. Government relations needs to be less rah-rah, and more of a reality check. We need to scare them into action. Right? We have to ask ourselves, why and how do we still have this disconnect between talking with government and seeing real change?"

The reason, she added, "We need to do a better job talking about infrastructure needs, workforce and skills needs, and what has to happen to improve our product and experiences. We need to focus less on how fun and exciting we think we are. We need to get government more current data on all those things we need, and we need to do it faster. We have to look at ourselves, because we can do better."

The challenge for many destination organizations, however, is they're overwhelmed. What many leaders say they need is a way to structure, codify and prioritize government, community and destination strategy. And, they need to be able to define and validate their level of participation in all those supply-side initiatives to their Boards of Directors, elected officials, community leaders, and industry stakeholders.

Destination Vancouver does that well with their "LEIF Model" to identify the amount of resources they'll commit to community and destination development. They define those levels as: Lead, Enable, Influence and Follow, which communicates the organization's intentions to everyone in the city.

That is critical for building consensus. Organizations need to work with a wide breadth of industry partners and community stakeholders in the destination more than ever to accomplish more things: protect their funding, invest more time in government relations, collaborate with economic development organizations, and participate more intentionally in destination and product development, among others. But to what degree? That's where the LEIF model, or anything similar, helps guide resource allocation, Board buy-in, and community and industry messaging.

In addition, destination leaders are faced with new challenges and opportunities based on new social and technology shifts that we're still beginning to understand.

On the social side, more destination leaders have to navigate what's happening in their cities post-Covid, especially low downtown office occupancies and the impact of that on the commercial tax base. This is more of a North American phenomenon.

"Cities are attempting to recoup their deficits by grabbing bed tax to refill general funds," said one North American CEO. "Our visitor-based assessments are under threat." This was an issue pre-Covid but the pandemic accelerated concerns.

In terms of technology, he stated, "The challenge for destination organizations regarding our digital relevance has never been more extreme, especially with ChatGPT. We have to reenvision the visitor digital journey and accessibility of AI."

It's still early to grasp the implications of generative AI (of which there are many platforms), but the volume of conversation around it globally is formidable.

Aside from generative AI's obvious content development opportunities, there are a handful of national European destination organizations that are developing AI platforms to catalog massive amounts of suppliers and vendors within the business events segment, for now. Leisure will be next. The goal is to leverage next generation AI to identify ideal destinations and their supplier ecosystems to best respond to RFPs and their specific parameters. We're still in early stages, but the investments are being made now.

One national European CEO said, "We're building an open data platform for business events where we add data into a knowledge graph that connects with all hotels, airports, convention centers, etc., to optimize how we create and customize business events in the future. The elephant in the room is that we need to be rethinking business models. And that is really about asking ourselves, how can we digitize processes in new ways?"

Clearly, we are entering a new era where the global visitor industry will benefit from more global dialogue to navigate our collective future.

Work Plan

Phase 1:
Global Advisory Group

The development of the 2023 Futures Study began in December 2022. The project was completed in four phases. First, a Global Advisory Group of leading executives and destinations around the world was established. This Group played a key role in providing guidance on the overall project, and identifying and prioritizing key trends and strategies for the report. The members of the Global Advisory Group are listed on pages VI-VII.

Phase 2:
Major Trends Impacting the Global Visitor Economy

Extensive research was completed to identify key trends. More than 100 interviews were conducted with the Global Advisory Group and four Advisory Panels that were established to provide different perspectives on the future of our sector from both industry and non-industry leaders. The key takeaways from the interviews and research for each of the Panels is provided on pages 5-10.

Advisory Panels

1. **Disruptors Panel**
   Platform businesses, data and research providers, and technology thought leaders

2. **Industry Panel**
   Global visitor industry and association leaders

3. **Community Panel**
   Governments, foundations, nonprofits and economic development agencies

4. **Client Panel**
   Meeting planners, event organizers and tour operators

Interviews & Research

The interviews and research in Phase 2 informed the creation of the list of 50 trends that will impact the visitor economy and destination organizations in the next three years. The trends were bucketed into a Strategy Map to help structure the research process. The list was developed and finalized by:

1. **The Global Advisory Group**

2. **The DestinationNEXT project team**

3. **Young leaders at Destinations International, PCMA, and City Destinations Alliance (CityDNA)**

Phase 3:
Major Strategies for Destination Organizations

A list of 50 strategies was developed and categorized in a second Strategy Map. A new 2023 Futures Study survey was prepared that asked respondents to rank the strategies in order of importance in their destinations. There were also a number of additional questions relating to evolving roles and key performance indicators, shown on page 20. The full list of strategies is on pages 19-21.

The survey was distributed to Destinations International members and several other industry mailing lists, including: IMEX, ICCA, AACB, PCMA, and several regional organizations. A total of 837 destination leaders from 62 countries participated in the 2023 survey.

837 Participants   **62** Countries

Phase 4:
Report & Presentation

The overall research and survey data guided the development of the 4-quadrant DestinationNEXT Mandate Map presented in this report. A presentation deck has been prepared that includes numerous case studies and best practices to help implement the recommended strategies.

50 Trends   **50** Strategies

Advisory Panel Takeaways

The 50 trends and 50 strategies in the DestinationNEXT survey were identified based on extensive research and individual interviews with industry and non-industry leaders across four advisory panels, categorized as: Industry, Disruptors, Community and Clients. A full list of Advisory Panel members are named in Appendix B.

The following pages highlight key takeaways from each of those groups, which collectively provide a foundation for helping define the future direction of destination organizations around the world.

Community Panel

There's a major shift in how destination leaders at local, regional and national levels are influencing policy. Industry leaders have a bigger seat at more tables, because after Covid, government is more aware about how travel and tourism impacts a wider breadth of their communities and therefore their electorate base. More needs to be done however to provide destination leaders with more comprehensive data around the value and impacts of visitor revenues and brand development.

Accessible housing for industry workforce and residents is the #1 challenge in many cities and towns. Housing and homelessness are creating havoc and despair in many places where there are seemingly few effective strategies within the context of polarized community dynamics. Destination organizations are increasingly weighing in about how a lack of housing diversity is impacting their visitor economy. Destination leaders are also adamant that they can't remain on the sidelines anymore, but there is a serious lack of best practices to help guide them.

There is significant interest in identifying the long-term social impacts of the visitor economy. This is something our industry talks about a lot but have few demonstrable case studies with real world measurements. We know instinctively that visitor dollars support community development that impacts the social fabric of neighborhoods. What the industry needs to do is map that, which a few destinations have accomplished (Vienna). This is another area where the global industry can collaborate to benefit all organizations.

Environmental sustainability has shot way up as a priority for communities, and residents are looking for real-world strategies and implementation. All around the world, residents are much more educated about the impacts of climate change and global warming, and they're taking all industries to task. At the same time, the biggest carbon emitters are buildings and transportation, so the visitor industry is especially burdened with navigating the road between visitor growth and eventual net zero strategy in coming decades.

> **"** **There is a complete lack of consensus in our industry about how to address environmental sustainability and climate change.** **"**

Destination organizations are working much more closely with community organizations. Coming out of Covid, our industry is actively collaborating with Chambers, municipal governments, and not-for-profits, bringing collective resources to solve issues not considered travel and tourism issues in the past. That is increasing the focus on community development, much in the same way the industry focused on economic development a decade ago.

Destination leaders are more intentional about capacity building to better serve visitors in the long-term. WIth visitor volumes continually climbing, there is growing awareness that many destinations aren't keeping pace with infrastructure and service needs. Many industry organizations have a longer-term view now about what's required to keep their destinations competitive, and how to work with community, business and government leaders to deliver on that.

Loyalty is not a priority for younger workforce, and they have less interest in hospitality and tourism jobs, let alone a career. Destination leaders talk about how the Covid pandemic created an "employee renaissance" where many people reevaluated their personal and professional goals. This is a systemic shift across society, and many destination leaders feel ill-prepared to address effectively at scale.
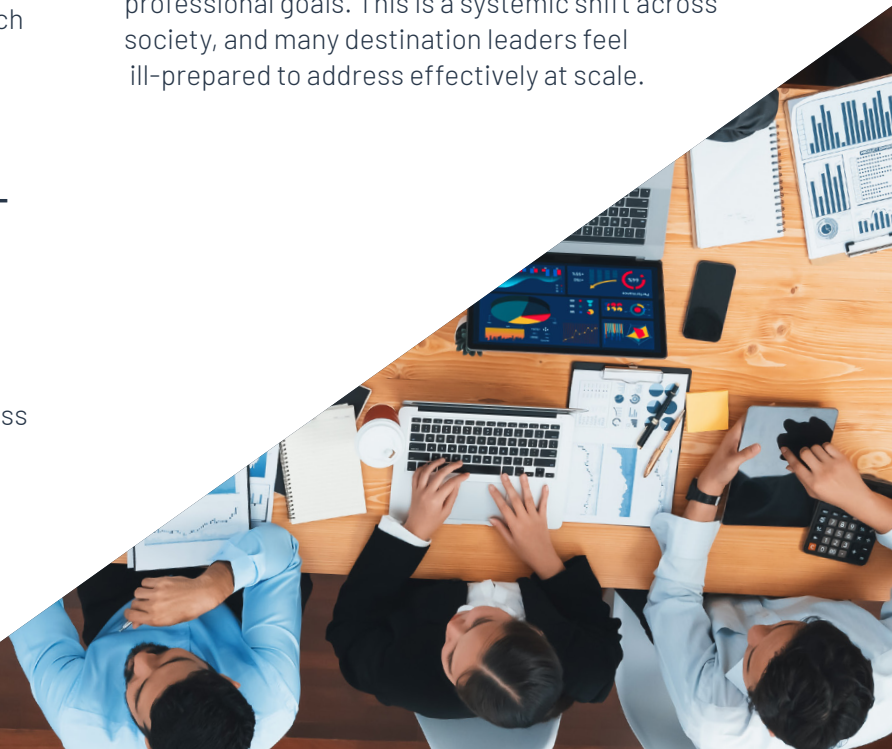
Industry Panel

Destination leadership must adapt with the evolving opportunities and challenges in destinations globally. The world is rapidly changing but there are questions if many destination organizations and their leadership at all levels are equipped to lead our communities forward. There is growing sentiment that destination leaders must reimagine their mandates and roles in order to be more valuable, relevant and respected on a broader scale, especially related to economic and community development.

More than ever, destination organizations are fighting to maintain their funding in destinations where general reserves are under increasing pressure, or where there's a lack of government and resident support. Governments are increasingly diverting funds to pay for broader infrastructure and community needs, including high capital expenditures such as housing and public works.

Destination organizations are shifting priorities and resources to support more destination development initiatives. Supporting partners in product and experience development for visitors ultimately enhances destination marketing efforts. Destination leaders are actively seeking bigger seats at more tables to advocate for the needs of the visitor. Also, supporting small business development and community/ neighborhood development in ways that improve the visitor experience is also effective government advocacy and resident engagement.

The visitor industry needs to develop global standards for measuring its economic and social impacts. Following the Covid pandemic, governments are more aware of how the travel industry supports economic and community development, but there is widespread differences in how destinations measure and share data to prove both short- and long-term/ legacy impacts. This is a major opportunity to bring the global industry together to define our value in our destinations beyond visitor volumes, visitor spending, and jobs.

The industry must prioritize equity, diversity and inclusion at leadership levels. Significant resources and efforts have been invested to create more inclusive destination organizations and their vendor networks. However, our industry can do more to support pipelines for diversifying leadership across the entire industry supply chain, especially to help attract a more diverse workforce.

Accessibility has become a major focus for the public and private sectors in the last few years. There is now much more awareness about how the visitor industry must improve how people of all abilities and ages navigate destinations, accommodations and attractions. Some organizations are including accessibility in EDI, coming up with labels like "IDEA." Others stress that accessibility should be its own theme because many of the strategies involved are distinctly unique.

Workforce shortages are the #1 challenge for many industry businesses worldwide. A wide cross-sector of industry and non-industry stakeholders are collaborating to identify strategies that will help attract more workers and a more diverse workforce. We are witnessing an "employee renaissance" where people are seeking better opportunities in other industries. That requires an entire re-envisioning of what our industry provides in terms of both personal and professional development.

Environmental sustainability is a top priority in some regions globally, but it's not even being discussed in others. There is a complete lack of consensus in our industry about how to address environmental sustainability and climate change. And this is one challenge that requires a unified global approach. The push toward Net Zero Carbon Emissions by 2050 has emerged as a clarion call for change, which could provide a greater global foundation for more collaborative and effective environmental stewardship.

The global visitor economy is returning to, or exceeding, pre-pandemic levels but inflation is driving higher costs in every industry segment. The higher price for doing business today is changing how, where and why people travel, especially in the business events segment. Inflation is vastly outpacing consumer spending, which is shifting what the industry is selling and how much customers are buying, and where they're deciding to travel.

> **The shift toward work-from-home means visitors have more flexible opportunities to travel for work and leisure.**

> **Stakeholders are collaborating to identify strategies that will help attract more workers and a more diverse workforce.**

There are generational shifts in industry workforce attitudes across the entire supply chain, and destination organizations are often losing their best and brightest to other industries. The next generation of destination leaders are not going to think like those in past years. Staff at destination organizations are under enormous pressure to develop professionally and earn higher incomes that older generations didn't have to bear. Workforce culture experts state that career development is a joint mission between leadership and staff, but while leadership is great with stakeholder engagement, it's not always the case with internal relationships.

Visitor industry business are carrying massive debt loads following the Covid pandemic. Even though visitor volumes are returning, many businesses are operating on borrowed time due to their debt obligations and increasing interest rates that limit access to capital.

The shift toward work-from-home means visitors have more flexible opportunities to travel for work and leisure. Every weekend is a potential long weekend for many people with flexible work environments. That is increasing the viability of bleisure or blended travel that gives destination organizations and their partners opportunities for increasing length of stay and/or midweek travel.

Destination organizations are adopting hybrid home/ office working arrangements for their staff. To remain competitive in talent attraction and retention, many organizations are providing more flexible work environments, with the understanding that face-to-face interactions are critical. Many leaders however are still trying to identify and understand optimal outcomes for this transformational shift in day-to-day operations.

The world is shifting from full globalization to more regional economies and supply chains. Covid, international conflicts, the steady rise of populism, and trade wars are dividing the world into pieces. For business events, this is changing the nature of single global conventions into networks of regional events. On the leisure side, the shift is negatively impacting many destination brands in the eyes of various source markets, where people are increasingly making decisions about where to travel based on polarizing politics.

Disruptors Panel

On a macro level, Generative AI offers much more than advanced search and fact-finding tools. Rather, platforms such as ChatGPT, Google Bard, Microsoft Bing and others are brainstorming, reasoning and strategy development tools. They can tackle complex challenges by identifying best practices and case studies quickly and broadly. The more confusing things are with any given challenge, the better Generative AI performs. In this sense, it's not about new advances in AI being trustworthy, as many fear. It's about connecting dots and seeing opportunities in ways we haven't been able to previously.

On a more tactical level, companies are embedding Generative AI into their platforms to improve personalization, customer service and sales conversion. AI can also enhance numerous destination organization roles from marketing to partnership development. And on the business events side, regional/national destination organizations and industry associations are developing complex AI platforms to provide smarter sourcing and procurement processes. Ultimately, Generative AI will infuse predictive consumer engagement into every digital experience.

Today's data management platforms are much more affordable and actionable. Destination organizations are focusing on "data storytelling" to educate partners, government and residents more effectively. A wide range of sophisticated data platforms provide intuitive dashboards detailing geolocation heat maps, visitor credit card spending, visitor/local travel behavior patterns, event attendance, source markets, competitive set details, etc., which can then be shared with appropriate audiences for advocacy, education and/or business development.

New data management platforms are also delivering on-demand data and predictive analytics to provide future travel scenario modeling. Destination organizations and their key partners now have access to same-day and forward-looking data, when in the past, data was often too old to be valuable. Now, destination leaders can make their case to Boards and governments that is much harder to ignore. Fresh and predictive data also helps destinations plan for upcoming events and high-compression periods much more successfully to help prioritize and distribute resources.

Universities and 3rd party data companies are providing much needed data on housing, short-term rental, workforce mobility, childcare, etc. The key to developing strategies to address some of the most seemingly intractable housing and workforce issues begins and ends with data. Destination organizations are working with non-traditional partners like universities to collect short- and long-term modeling data that proves empirically the severity of these issues.

Following Covid, the industry has been investing more heavily in data analysts. One of the fastest growing positions in destination organizations is professionals with combined skills in web development, CRM development, social media and/or data analytics. Now, with the addition of ChatGPT, destination leaders are eager for people who can connect all those dots to personalize the visitor experience and optimize partner revenue.

Electric Vertical Takeoff & Landing (eVTOL) vehicles are autonomous "flying taxis" that seem too futuristic to believe, but they're here. Major airlines have been investing in these small passenger vehicle companies and they're placing orders because the technology is proven. The challenges right now are the lack of infrastructure to land (vertiports), the necessary regulatory frameworks, and mainstream consumer confidence.

From London to Las Vegas, cities around the world are rolling out autonomous car-sharing platforms. Presently, automobile companies are investing heavily in driverless public transit systems to provide first-last mile solutions that benefit both locals and visitors. Autonomous car-sharing is also in advanced stages. That is incentivizing cities to invest in the necessary multimodal mobility infrastructure to ultimately streamline how we visit and live in cities.

Tech companies continue to invest billions in blockchain (web3) technology amid the NFT/crypto backlash based on its proven ability to drive customer loyalty.
An extreme lack of mainstream understanding about what blockchain tech is means there's a long way to go to drive adoption. However, a number of progressive destination organizations are exploring ways to use web3 to incentivize and reward visitor behavior, with the blockchain providing a secure and transparent web architecture for new ecommerce opportunities.

Gig work platforms are helping solve workforce capacity challenges. These portals provide flexible labor where workers get to choose the days they want to work. Outside of travel, they are proving to be successful platforms for both employers and employees. Business have a wide pool to draw from and workers love the flexibility.

Client Panel

We live in an omnichannel world and the business events industry needs to deal with it. There's been a lot of talk about how hybrid events were a bandaid to help get through Covid, but they're a poor substitute for face-to-face meetings. That type of binary thinking isn't serving the interests of the business events industry, clients and attendees. Today, our phones and digital networks are extensions of ourselves. Few people under 50 will disagree with that. Many business event professionals are continuing to advance hybrid systems, but there's still work to do to identify profitable business models.

With the surge of business events coming back globally, there are significant capacity issues. Space and air service availability are key concerns for many destinations. It is anticipated that it will take until the end of 2024 to absorb all the postponed events during Covid. At the same time, air service to secondary markets has been diminished, causing added compression in first-tier cities.

Destinations need to prove commitment to environmental sustainability and equity, diversity and inclusion. Business event professionals are now demanding empirical proof of how destinations and venues are supporting efforts to lessen carbon impact and increase inclusivity across their entire supply chains. Event RFPs are clear about this and event professionals state they're under growing pressure from their clients to show due diligence and verifiable results.

Streamlining and optimizing event design is now a mainstream priority. Coming out of the pandemic, even most conservative sectors and Boards have embraced shortening, simplifying and maximizing the "experience" at live events.

Global inflation and weakened supply chains are having an outsize impact on business events. Rapidly increasing costs for every element of a business event are impacting both client budgets and attendee choices. Expectation is that attendees who previously attended 4-5 events per year will now only do 2-3. Event owners are aggressively attempting to ensure theirs is one of those chosen.

Transitions across the business events industry make an already challenging job even more difficult. Ongoing staffing changes remains a huge issue in hotels, venues and other suppliers. New staff are often younger and inexperienced without the same level of decision-making ability. All of this has led many experienced planners to remark that: 1) many of their key contacts have left the industry; 2) the entire planning experience now feels transactional versus relationship-oriented or strategic; and 3) it's simply not enjoyable anymore to work under these conditions.

> " **It is anticipated that it will take until the end of 2024 to absorb all the postponed events during Covid.** "
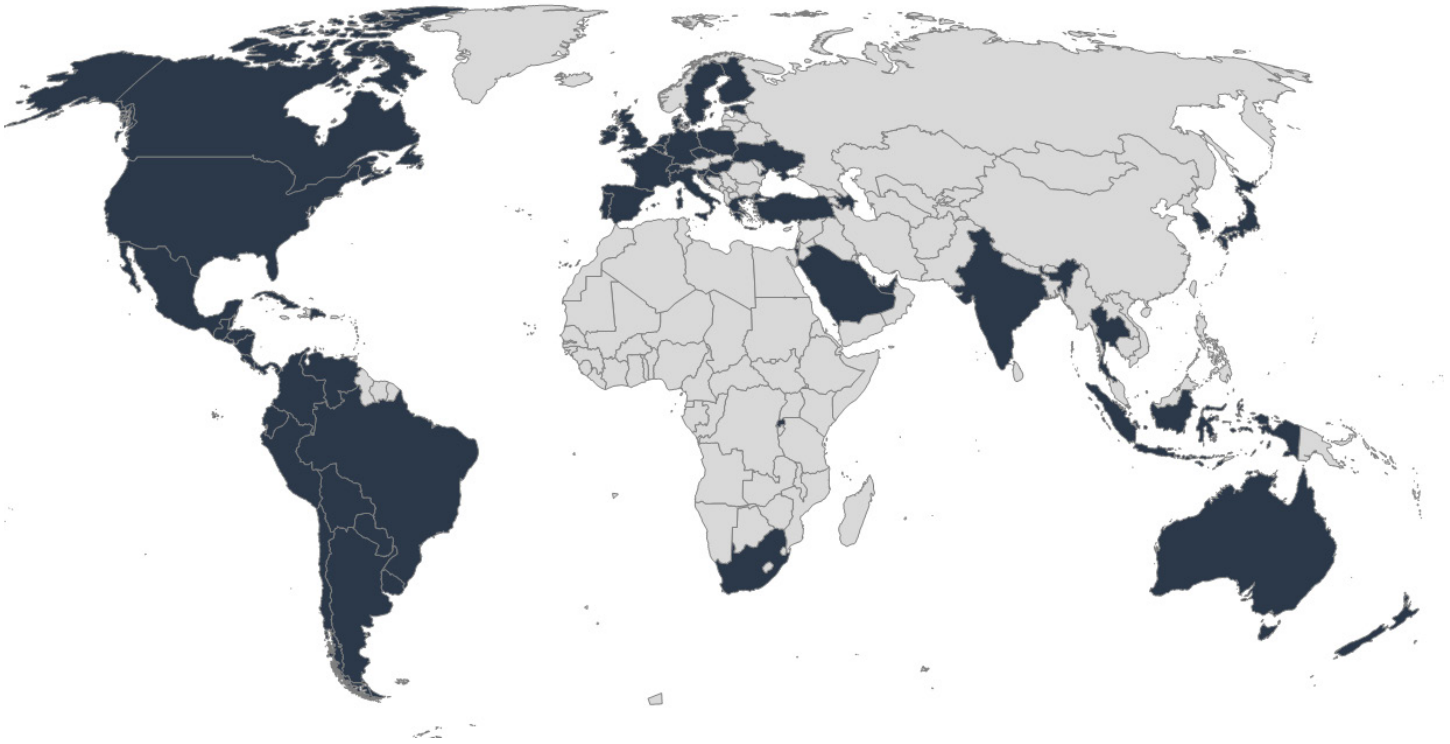
Global
Outreach

Two global surveys were distributed in Q2 2023 for participants to rank the industry trends and organization strategies. The Global Advisory Group, a wide selection of young industry leaders, and the project team responded to the trends survey. The strategy survey was sent to destination organizations worldwide. A complete list of survey participants is included in Appendix C.

Collectively, the two surveys asked questions related to the following:

- Business and governance profiles of the destination organization

- Key trends impacting the industry and global visitor economy

- Destination organization strategies in response to key trends

- Current roles and key performance indicators for the organization, as well as ideal roles and KPIs in the future

- Future-proofing options for destination organizations to adapt to global socioeconomic and environmental shifts

Argentina

Aruba

Australia

Azerbaijan

Barbados

Belgium

Belize

Bermuda

Bolivia

Brazil

Canada

Chile

Colombia

Costa Rica

Croatia

Cuba

Czech Republic

Denmark

Dominican Republic

Ecuador

El Salvador

Estonia

Finland

France

Germany

Greece

Guatemala

Honduras

Hungary

India

Indonesia

Ireland

Israel

Italy

Japan

Mexico

Netherlands

New Zealand

Nicaragua

Panama

Paraguay

Peru

Poland

Portugal

Qatar

Rwanda

Saudi Arabia

Singapore

Slovenia

South Africa

South Korea

Spain

Sweden

Switzerland

Thailand

Turkey

Ukraine

United Arab Emirates

United Kingdom

United States

Uruguay

Venezuela

Market Segment

Leisure Travel Only
(group tour and independent)
13%

Business Events Only
(meetings, incentives,
conventions, exhibitions)
23%

**Both Market
Segments**
64%

Facilities

Do you operate a facility?

**No
73%**

**Yes
27%**

If yes, what kind?

Other 8%

Museum 3%

Theater 5%

Stadium 2%

**Convention or
Conference Center
22%**

**Visitor Information
Center
60%**

Business Model

Chamber of Commerce
4%

Private/Public
Partnership
10%

Government
Department/Authority
21%

Other
13%

Non-profit Organization,
with no membership
17%

Non-profit Organization,
with membership
35%

Governance Model

Volunteer
Leadership Committee
5%

Government
Department/Ministry
8%

Other
16%

Government Appointed
Board of Directors
23%

Member-elected
Board of Directors
48%

Budget Profile

$50,000,000 – $99,999,999
3%

$100,000,000 or more
2%

$20,000,000 – $49,999,999
8%

Less than $500,000
23%

$10,000,000 – $19,999,999
11%

$500,000 – $999,999
12%

$5,000,000 – $9,999,999
11%

$1,000,000 – $4,999,999
30%

Is any of your current funding at risk of being reduced or eliminated in the next three years?

No
63%

Yes
37%

	LATAM	Asia Pacific	Canada	EMEA	USA
No	54%	57%	58%	61%	71%
Yes	46%	43%	42%	39%	29%

■ Yes   ■ No
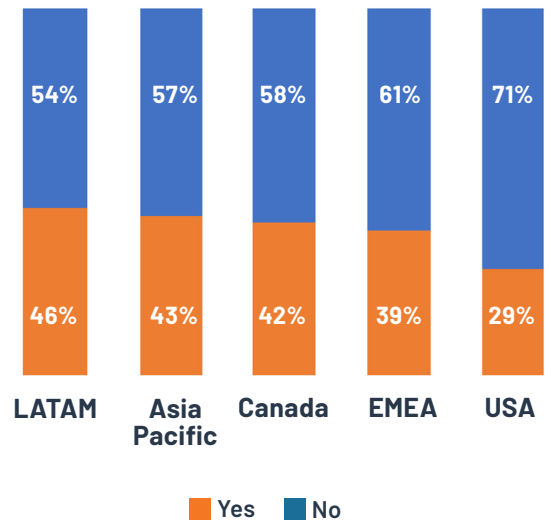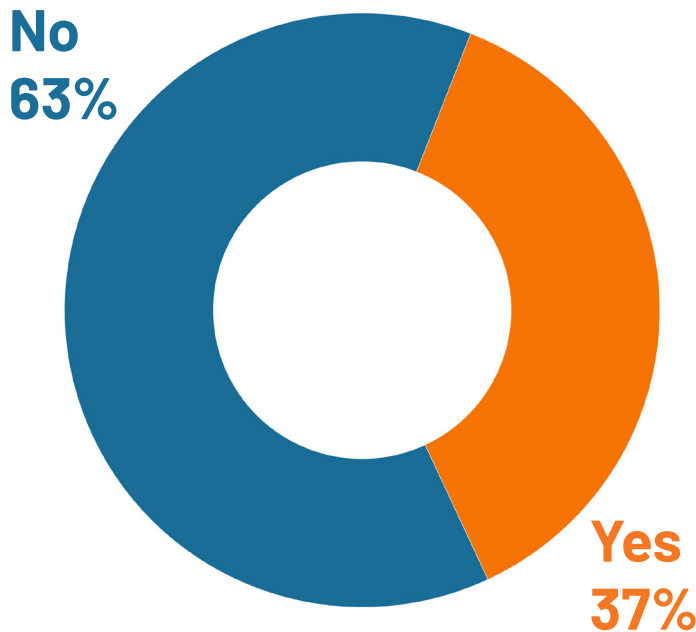
Top 50 Trends

These are the 50 industry and consumer trends for 2023 ranked in terms of their impact for destination organizations.

The change in ranking from DestinationNEXT 2021, or if the trend is new this year, is indicated for each.

| 1 | **+ 84** | Artificial intelligence will become increasingly prevalent at an accelerated pace |

| 2 | **0** | Customers are increasingly seeking a unique, authentic travel experience |

| 3 | **+ 27** | Communities expect to be more engaged in destination, product and experience development for locals and visitors |

| 4 | **+ 28** | Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts |

| 5 | **– 4** | Greater industry, community and government alignment is driving destination competitiveness and brand |

| 6 | **+ 32** | Resident sentiment is becoming a key measurement |

| 7 | **+ 48** | Labor and skill shortages are increasingly being felt in sectors of the tourism industry |

| 8 | **+ 20** | There's a greater focus on placemaking to benefit both locals and visitors |

| 9 | **+ 17** | DMO/CVBs are increasing advocacy to communicate value of visitor economy to government |

| 10 | **+ 6** | New data management platforms provide a 360-degree view of visitors and destination to help optimize strategy |

| 11 | **– 8** | Content creation and dissemination by the public and stakeholders across all platforms drives the destination brand and experience |

| 12 | **+ 6** | Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources |

| 13 | **– 7** | Travelers are seeking more personal enrichment and wellbeing |

| 14 | **– 10** | Short-form video becomes the new currency of destination marketing and storytelling |

| 15 | **+ 12** | There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain |

| 16 | **+ 15** | Business events are increasingly being positioned as catalysts for economic and social benefits |

| 17 | **NEW** | Visitors are increasingly seeking experiences that embrace equity, diversity and inclusion and support underserved communities |

| 18 | **+ 6** | Governments are more aware of the visitor economy's impact on jobs, tax base and the overall economy |

| 19 | **NEW** | Combined business and leisure travel ("bleisure/blended travel") is becoming more popular |

| 20 | **– 6** | There is greater demand for more dynamic outdoor experiences |

| 21 | **NEW** | More destinations are focusing on improving accessibility for travelers of all abilities |

| 22 | **NEW** | Demand across the global visitor economy continues to be strong |

| 23 | **+ 13** | More destinations are focusing on attracting "high value" visitors to increase economic impact |

| 24 | **+ 28** | Meeting attendees, event owners, sponsors, etc. are expecting destinations and venues to have established sustainability goals and metrics |

| 25 | **NEW** | More destinations are increasing their focus on sports tourism and major cultural events for short and long-term business development |

26	0	Organizations are increasingly prioritizing government advocacy to address macro challenges
27	– 22	Travelers are demanding more personalized information, control and interaction
28	NEW	Our industry is seeing a significant generational shift in the workplace
29	NEW	Destinations are increasingly prioritizing long-term/long-tail/legacy impacts of business events
30	NEW	Climate change will increasingly impact how governments and the private sector operate
31	NEW	The present inflationary environment is impacting many aspects of travel
32	+ 38	Increasing social challenges and political disruptions are damaging destination brands and increasing industry and customer fears
33	– 4	Disruptions due to terrorism, pandemics, disasters, etc., will increasingly impact how DMO/CVBs function
34	NEW	The increasing housing crisis in many destinations is severely impacting workforce development needs
35	+ 34	Loss of 3rd party cookies are requiring new marketing strategies and tactics
36	NEW	Increasing homelessness is damaging the visitor experience, destination brand and business development in more communities
37	NEW	Competition among destinations is increasing incentives and subvention funds for business events, cultural events and sports tourism
38	NEW	Violent crime risks are negatively influencing destination decisions
39	– 29	Travelers want assurances of high standards of cleanliness and hygiene
40	– 20	Risk management/mitigation is now a top priority
41	+ 58	More communities are increasingly attempting to attract digital nomads
42	NEW	The rise of the "anytime, anywhere traveler" means every weekend is a long weekend for travelers who work from home
43	– 3	Industry-generated taxes are increasingly vulnerable to being diverted
44	+ 35	Governments are rethinking global supply chains to improve resilience
45	+ 37	Short-term rentals are having a growing impact on declining long-term workforce housing
46	– 31	Business event customers are looking for better collaboration with destinations to achieve greater business outcomes
47	– 4	There is significantly less corporate travel due to mainstream adoption of video-based conferencing
48	+ 41	The shift to remote, work-from-home workforce is accelerating
49	NEW	Downtown businesses are adapting to increasing vacancies in corporate offices
50	+ 3	There is increasing confusion due to widespread disparities regarding border and trade restrictions

Top 50 Strategies

These are the 50 strategies for destination organizations for 2023.

The change in ranking from DestinationNEXT 2021, or if the strategy is new this year, is indicated for each.

#	Change	Strategy
1	NEW	Protect revenue sources to maintain current funding levels
2	+ 3	Focus on developing authentic experiences for the customer
3	+ 6	Better integrate tourism and economic development
4	0	Build the destination brand around the community's goals, values and creative energy
5	+ 15	Have a greater role in destination and product development
6	+ 1	Develop a destination master/management plan to define long-term strategy
7	+ 5	Increase capabilities in data management for business intelligence, marketing and community engagement
8	– 7	Focus significant attention on content creation and dissemination
9	NEW	Develop a data-driven plan for a more sustainable visitor economy
10	+ 1	Align the visitor experience and quality of life for residents in my community
11	NEW	Increase our organization's knowledge of innovative technologies
12	NEW	Increase efforts to attract and retain our organization's talent
13	NEW	Increase support with local government leadership to influence policy
14	+ 42	Develop and support new events in the destination
15	NEW	Improve local resident sentiment to increase support for the visitor economy
16	– 10	Develop new KPIs to better measure the economic and social impact of the visitor economy beyond visitor volume
17	– 15	Play more of a central role in advocacy in my destination
18	– 15	Enhance engagement with the local community to manage considerations for our visitor economy
19	– 3	Protect and help steward the future of our natural environment
20	NEW	Improve accessibility for people of all abilities throughout the destination
21	NEW	Increase industry promotion to promote tourism as a career path and support workforce development
22	+ 20	Improve equity, diversity and inclusion across the organization (staff & Board)
23	NEW	Diversify revenue sources to expand current funding levels
24	+ 10	Increase support for local small businesses and community groups
25	+ 20	Leverage our region's priority economic sectors to generate business events
26	NEW	Improve Board development and governance
27	+13	Expand mandate to broaden our impact and relevance in the community
28	NEW	Expand support for local arts and cultural organizations
29	NEW	Increase efforts to develop the region's sports tourism market

30	– 8	Actively encourage policy makers to reduce barriers to travel
31	NEW	Develop a bleisure/blended travel (combined business & leisure travel) initiative with partners
32	+ 22	Lead and support initiatives to address industry workforce shortages
33	+ 11	Develop strategies and policies to improve equity, diversity & inclusion in our vendor network
34	– 5	Pay close attention to safety, health, and security as a strategic consideration
35	NEW	Support development for businesses operated by members of underserved communities (e.g., Black, Brown, Indigenous, etc.)
36	+ 27	Increase collaboration with local community organizations to address social issues
37	+ 28	Increase use of incentives to attract events
38	+ 31	Work more closely with airlines to build and promote air routes
39	NEW	Expand efforts to help develop and promote local neighborhoods
40	+ 14	Develop a more comprehensive crisis management strategy
41	+ 28	Increase client support for event legacy goals that positively impact local communities and support human rights management
42	NEW	Support improvement of regulatory compliance and occupancy tax strategy for short term rentals
43	NEW	Use Generative AI technology like ChatGPT for marketing, sales and other purposes
44	NEW	Increase engagement with government, community, and industry stakeholders to address housing affordability and availability
45	+ 33	Attract more remote workers to visit the destination for extended stays
46	NEW	Develop a resident advisory committee/council to promote greater community and resident engagement
47	+ 30	Increase involvement in risk assessment/mitigation strategies for business events
48	NEW	Increase engagement with government, community, and industry stakeholders to address homeless/mental health issues
49	+ 24	Increase advocacy efforts regarding border trade and travel restrictions
50	+ 30	Consider mergers with other organizations (e.g., economic development, government departments, chambers of commerce, etc.)

Organizational
Roles & KPIs

The 2023 Futures Study survey asked participants to rank their most important organizational roles and key performance indicators (KPIs), both for today and what they believe they will prioritize in three years.

Organizational Roles

	Current	Future		Current	Future
Destination marketing	1	1	Environmental stewardship	14	13
Community relations and partnership	2	5	Sports tourism development and promotion	15	16
Brand management	3	3	Major event partner and developer	16	17
Destination information resource	4	6	Workforce development	17	15
Data research and business intelligence	5	2	Crisis management and emergency preparedness	18	19
Destination and product development	6	4	Convention services	19	18
Industry advocate	7	8	Air service and route development	20	20
Government relations and policy development	8	7	Health and safety resource	21	21
Visitor services	9	11	Film and television industry development	22	22
Meetings and conventions sales	10	10	Venue operator	23	23
Broader economic development	11	9	Other	24	24
Leisure sales	12	12			
Equity, Diversity, Inclusion leadership	13	14			

KPIs

	Current	Future		Current	Future
Economic impact of tourism	1	1	Leads/referrals to business	11	12
Overnight visitation	2	3	Hotel performance metrics	12	14
Stakeholder support and business development	3	10	Resident sentiment	13	7
Room nights generated	4	8	Earned media metrics	14	16
Number of visitors/delegates	5	5	Equity, diversity, and inclusion	15	11
Visitor satisfaction	6	2	Long-term/legacy impacts from events	16	17
Marketing ROI	7	4	Conversion metrics	17	15
Member/partner satisfaction	8	6	Environmental stewardship impacts	18	18
Social media metrics	9	13	Air service	19	19
Community benefits and social impacts	10	9	Event bid success ratio	20	20
			Venue profits	21	21

DestinationNEXT
Mandate Map

The survey data and insights from everyone who participated in developing the 2023 Futures Study clearly indicate the need for a more codified structure that defines how destination organizations identify and prioritize their roles.

At the same time, that structure needs to be flexible for organizations to customize their strategies based on their mandate and individual destination.

The DestinationNEXT Mandate Map provides that structure. It also identifies two transformational opportunities for destination organizations relating to community leadership and technology adoption. Those two themes are intertwined within every element of this strategic framework.

The following Mandate Map is based on providing direction for addressing both promotion and development. It is designed with two quadrants relating to increasing demand and two quadrants relating to enhancing supply.

Demand:
Traditional roles for destination organizations related to marketing and sales

Supply:
Expanding roles focusing on data-driven community and destination development in collaboration with partners to enhance the destination experience for visitors and locals

It is important to navigate this framework through the lens of the previously mentioned "LEIF Model," whereby organizations attach a specific level of participation to these roles and strategies: Lead, Enable, Influence and Follow. That is critical for the organization's leadership team and staff, all industry and community stakeholders, and residents to support the organization's efforts.

The framework is designed so that everyone in a destination engages in common language that most everyone understands and values. It is also organized in a way where everyone in the destination can see how they benefit from the destination organization's roles and strategic priorities outlined in the framework. And for destination leaders, they can identify how much weight to give to each of the quadrants to decide resource allocation.

The four quadrants represent the four key, overarching roles for destination organizations that touch all stakeholder groups. Within each quadrant, there is a list of primary strategic imperatives. Those lists are not exhaustive, but they help prioritize direction for optimizing how organizations succeed in those four key roles.

DEMAND

Visitor
Engagement

- Digital storytelling
- Brand management
- AI marketing
- Visitor servicing
- Loyalty program

Partner
Support

- Data research & business intelligence
- Business events
- Major events & festivals
- Sports
- Film, music & culture

Community
Alignment

- Government relations & advocacy
- Sustainability
- Equity, diversity, inclusion & belonging
- Economic & workforce development
- Resident engagement & support

Destination
Development

- Product (experience) development
- Neighborhood development/ placemaking
- Air access
- Infrastructure development
- Accessibility

SUPPLY

This is the future. The trends and strategy data emphasize clear shifts to help guide how destination organizations adapt their roles and mandates to align with changes in their communities and the global visitor industry marketplace.

"Destination leaders need to look to the future," stated a CEO for a global industry association. "Our industry tends to always be reactive and not future-forward looking. For example, we're speaking about sustainability in a way that divides us, versus how we work together to build systems for the future. There are many examples like that where we need to rethink how we're leading our industry in the next decade and beyond."

Visitor
Engagement

Technology continues to evolve in ways that help destination organizations communicate with visitors throughout the entire engagement lifecycle before, during and after the in-destination travel experience.

Digital storytelling and brand management remain the top two individual roles for destination organizations, but everyone is trying to understand how to create a holistic, hyper-personalized digital journey for visitors most effectively in what will soon be a post-cookie world.

The major development in the past year is the meteoric rise of generative AI, although many destination organizations are still exploring how to use tools like ChatGPT, Microsoft Bing, Google Bard and many other AI platforms. They are best characterized as reasoning and brainstorming tools for identifying strategic opportunities across a much broader range of information sources than previously imagined.

AI was the #1 ranked trend in this year's Futures Study. Large online travel agencies are embedding new AI technologies into their apps that provide better personalized recommendations for customers, and from the companies' perspective, better conversion and loyalty performance.

Mobile-first video usage continues to soar on social media channels, including both horizontal and vertical formats. Organizations have increasing interest in leveraging user-generated video content from both known influencers and everyday locals and visitors to highlight local experiences. There's also a growing roster of platforms to help organizations host user-generated videos that provide a wealth of data for industry and hyperlocal information for visitors.

Blockchain (web3) technology, gaming and esports, and the metaverse keep evolving despite the mainstream backlash against crypto/NFTs as speculative monetary instruments. There are many other use cases, however. Companies across many industries are continuing to invest billions of dollars in next-gen web3 architecture and digital platforms, and some destination organizations are exploring related opportunities to acquire more 1st party data and increase destination loyalty.

Relevant Trends

1 Artificial intelligence will become increasingly prevalent at an accelerated pace

2 Customers are increasingly seeking a unique, authentic travel experience

3 Communities expect to be more engaged in destination, product and experience development for locals and visitors

11 Content creation and dissemination by the public and stakeholders across all platforms drives the destination brand and experience

13 Travelers are seeking more personal enrichment and wellbeing

14 Short-form video becomes the new currency of destination marketing and storytelling

17 Visitors are increasingly seeking experiences that embrace equity, diversity and inclusion and support underserved communities

19 Combined business and leisure travel ("bleisure/blended travel") is becoming more popular

20 There is greater demand for more dynamic outdoor experiences

22 Demand across the global visitor economy continues to be strong

23 More destinations are focusing on attracting "high value" visitors to increase economic impact

13 Meeting attendees, event owners, sponsors, etc. are expecting destinations and venues to have established sustainability goals and metrics

Relevant Strategies

1 Build the destination brand around the community's goals, values and creative energy

7 Increase capabilities in data management for business intelligence, marketing and community engagement

8 Focus significant attention on content creation and dissemination

Partner
Support

Destination organizations are optimizing and diversifying how they collaborate with industry and non-industry partners to drive demand for the region.

On the leisure travel side, organizations are increasingly developing relationships with local companies and organizations with innovative leadership and creative missions to promote the community's unique cultural DNA. The purpose here is to promote the values and creative energy that help differentiate the destination, above and beyond assets, attractions and infrastructure.

For business events, more destinations are collaborating with their advanced industry clusters to attract conventions and conferences in those industries. In previous years for the Futures Study, this strategy was often mostly for larger cities. With with the ongoing dispersion of the knowledge economy, more midsize cities are capitalizing on their intellectual capital.

Destination leaders are also increasing capabilities in data management to support partners with better business intelligence and marketing insights according to the survey results. Data management jumped five points from #12 in 2021 to #7 today in the Strategy rankings. Looking at the Roles rankings, data management is anticipated to be the #2 most important priority in the near-term future after destination marketing.

Somewhat surprising this year, the data showed how organizations are seemingly much more interested today in attracting new events to the destination, in collaboration with a wide range of partners. This strategy jumped from the back of the survey in 2021 to the #14 most important strategy in 2023. Much of that is to do with how festivals and special events are successfully encouraging more seasonal and geographical visitor volumes and dispersal.

Relevant Trends

2 Customers are increasingly seeking a unique, authentic travel experience

3 Communities expect to be more engaged in destination, product and experience development for locals and visitors

4 Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

5 Greater industry, community and government alignment is driving destination competitiveness and brand

7 Labor and skill shortages are increasingly being felt in sectors of the tourism industry

10 New data management platforms provide a 360-degree view of visitors and destination to help optimize strategy

12 Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources

15 There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain

16 Business events are increasingly being positioned as catalysts for economic and social benefits

Relevant Strategies

6 Develop a destination master/management plan to define long-term strategy

7 Increase capabilities in data management for business intelligence, marketing and community engagement

9 Develop a data-driven plan for a more sustainable visitor economy

11 Increase our organization's knowledge of innovative technologies

12 Increase efforts to attract and retain our organization's talent

14 Develop and support new events in the destination

16 Develop new KPIs to better measure the economic and social impact of the visitor economy beyond visitor volume

21 Increase industry promotion to promote tourism as a career path and support workforce development

24 Increase support for local small businesses and community groups

25 Leverage our region's priority economic sectors to generate business events

Destination
Development

One of the most significant takeaways from the 2023 Futures Study is how destination organizations are increasingly prioritizing destination development, which as defined here, includes a broad scope of themes through a travel industry lens.

They include: Product and experience development; small business development; neighborhood development and placemaking; infrastructure, transportation/mobility and air service development; and accessibility enhancement for people of all abilities.

Therefore, "development" can apply to everything from years-long, capital-intensive projects to creating a restaurant week. From a high-level perspective, destination development is about continually improving the quality of the destination and destination experience for visitors and locals. No destination exists in perfect equilibrium, and the most competitive cities and towns are continually reinvesting in infrastructure, amenities, activities, services, etc.

The #2 trend this year is, "Customers are increasingly seeking a unique, authentic travel experience." The #2 strategy is, "Focus on developing authentic experiences for the customer." The trend has ranked near the top in the last several Futures Studies. But the strategy continues to gain importance, ranking #5 in 2021 and #7 in 2019. Also, "Have a greater role in destination and product development" ranked #5, jumping 15 places from 2021.

There are a significant amount of destination development strategies in the top 10 for 2023. Placemaking is a theme that many destination organizations embrace, while many others have traditionally dismissed it. This year, the greater focus on placemaking ranked as the #8 trend, jumping up 20 points from 2021. Also, "Develop a destination master/management plan to define long-term strategy" ranked #8.

Destination organizations have been leading or supporting initiatives like those for decades, but based on the survey data, destination development is moving up the chain of priorities. The challenge is that destination leaders are sometimes wary of the word "development," based on what public/private stakeholders and residents perceive that word to mean. There needs to be more industry consensus and public education related to destination development in the coming years.

Relevant Trends

2 Customers are increasingly seeking a unique, authentic travel experience

3 Communities expect to be more engaged in destination, product and experience development for locals and visitors

4 Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

8 There's a greater focus on placemaking to benefit both locals and visitors

19 Combined business and leisure travel ("bleisure/blended travel") is becoming more popular

20 There is greater demand for more dynamic outdoor experiences

21 More destinations are focusing on improving accessibility for travelers of all abilities

25 More destinations are increasing their focus on sports tourism and major cultural events for short and long-term business development

Relevant Strategies

2 Focus on developing authentic experiences for the customer

5 Have a greater role in destination and product development

6 Develop a destination master/management plan to define long-term strategy

9 Develop a data-driven plan for a more sustainable visitor economy

14 Develop and support new events in the destination

19 Protect and help steward the future of our natural environment

20 Improve accessibility for people of all abilities throughout the destination

24 Increase support for local small businesses and community groups

Community
Alignment
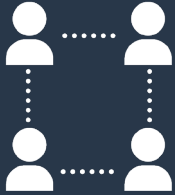
Today, there is widespread agreement across our industry that aligning government, industry and community leaders increases the performance of a destination across every indicator.

That is the basis for both Destinations International's "Shared Community Value" advocacy initiatives and the World Economic Forum's bi-annual Travel & Tourism Development Index that ranks countries' global competitiveness.

In the 2021 Futures Study, the #1 trend was, "Greater industry, community and government alignment is driving destination competitiveness and brand." This year it is #5. So it dropped a bit in 2023 but it's still in the top 10%.

"Communities expect to be more engaged in destination, product and experience development for locals and visitors" is the #3 trend this year. The #3 strategy is, "Better integrate tourism and economic development." The fact both those are in the top three in each of their ranking lists drives home the importance that destination leaders place on cross-sector collaboration.

The #7 trend is, "Labor and skill shortages are increasingly being felt in sectors of the tourism industry." This is a massive issue worldwide and will require unprecedented community alignment to address effectively.

The #1 strategy for 2023 is, "Protect revenue sources to maintain current funding levels." That requires community engagement at the highest level, and there is increasing concern about funding diversion worldwide. The data this year shows that a full one-third of destination organizations, on average globally, believe their funding is not secure in the next few years.

Where things are rapidly evolving is the #4 trend, "Destinations are looking at sustainability/ regeneration more broadly, encompassing economic, social and environmental impacts." The #9 strategy is, "Develop a data-driven plan for a more sustainable visitor economy."

The world has been talking about balancing the needs of "people, planet and profit" for more than half a century. The data and feedback from destination leaders, however, are all across the map. For some destinations, environmental sustainability is a key priority, while it is only given lip service elsewhere. And in terms of equity, diversity and inclusion (EDI), that is already a given in many countries around the world. In other regions, improving EDI is now a critical conversation for organizations and their communities, whereas it wasn't in the past.

On a positive note, since the Covid pandemic, there seems to be increased willingness for government, industry and community to work together more intentionally.

Relevant Trends

3 Communities expect to be more engaged in destination, product and experience development for ocals and visitors

4 Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

5 Greater industry, community and government alignment is driving destination competitiveness and brand

6 Resident sentiment is becoming a key measurement

9 DMO/CVBs are increasing advocacy to communicate value of visitor economy to government

12 Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources

15 There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain

18 Governments are more aware of the visitor economy's impact on jobs, tax base and the overall economy

24 Meeting attendees, event owners, sponsors, etc. are expecting destinations and venues to have established sustainability goals and metrics

Relevant Strategies

6 Protect revenue sources to maintain current funding levels

3 Better integrate tourism and economic development

6 Develop a destination master/management plan to define long-term strategy

9 Develop a data-driven plan for a more sustainable visitor economy

10 Align the visitor experience and quality of life for residents in my community

13 Increase support with local government leadership to influence policy

15 Improve local resident sentiment to increase support for the visitor economy

17 Play more of a central role in advocacy in my destination

18 Enhance engagement with the local community to manage considerations for our visitor economy

21 Increase industry promotion to promote tourism as a career path and support workforce development

22 Improve equity, diversity and inclusion across the organization (staff & Board)

23 Diversify revenue sources to expand current funding levels

25 Leverage our region's priority economic sectors to generate business events

Business Event Organizations

These are the top 50 strategies for destination leaders at convention bureaus that are responsible exclusively for developing and promoting business events.

The priority of strategies differs significantly from the main aggregate list of strategies that were ranked by organizations across all mandates.

Business Event Strategies

1. Develop and support new events in the destination
2. Leverage our region's priority economic sectors to generate business events
3. Develop a destination master/management plan to define long-term strategy
4. Better integrate tourism and economic development
5. Focus on developing authentic experiences for the customer
6. Have a greater role in destination and product development
7. Increase capabilities in data management for business intelligence, marketing and community engagement
8. Increase our organization's knowledge of innovative technologies
9. Develop a data-driven plan for a more sustainable visitor economy
10. Build the destination brand around the community's goals, values and creative energy
11. Focus significant attention on content creation and dissemination
12. Increase client support for event legacy goals that positively impact local communities and support human rights management
13. Increase support with local government leadership to influence policy
14. Increase efforts to attract and retain our organization's talent
15. Protect revenue sources to maintain current funding levels
16. Play more of a central role in advocacy in my destination
17. Protect and help steward the future of our natural environment
18. Increase industry promotion to promote tourism as a career path and support workforce development
19. Develop new KPIs to better measure the economic and social impact of the visitor economy beyond visitor volume
20. Develop a bleisure/blended travel (combined business & leisure travel) initiative with partners
21. Pay close attention to safety, health, and security as a strategic consideration
22. Align the visitor experience and quality of life for residents in my community
23. Improve accessibility for people of all abilities throughout the destination
24. Improve local resident sentiment to increase support for the visitor economy
25. Improve equity, diversity and inclusion across the organization (staff & Board)
26. Work more closely with airlines to build and promote air routes
27. Lead and support initiatives to address industry workforce shortages
28. Enhance engagement with the local community to manage considerations for our visitor economy
29. Develop strategies and policies to improve equity, diversity & inclusion in our vendor network
30. Expand mandate to broaden our impact and relevance in the community
31. Diversify revenue sources to expand current funding levels
32. Actively encourage policy makers to reduce barriers to travel
33. Improve Board development and governance
34. Increase use of incentives to attract events
35. Increase involvement in risk assessment/mitigation strategies for business events
36. Expand support for local arts and cultural organizations
37. Increase support for local small businesses and community groups
38. Increase collaboration with local community organizations to address social issues
39. Increase efforts to develop the region's sports tourism market
40. Expand efforts to help develop and promote local neighborhoods
41. Support development for businesses operated by members of underserved communities (e.g., Black, Brown, Indigenous, etc.)
42. Develop a more comprehensive crisis management strategy
43. Consider mergers with other organizations (e.g., economic development, government departments, chambers of commerce, etc.)
44. Attract more remote workers to visit the destination for extended stays
45. Increase engagement with government, community, and industry stakeholders to address homeless/mental health issues
46. Increase advocacy efforts regarding border trade and travel restrictions
47. Develop a resident advisory committee/council to promote greater community and resident engagement
48. Support improvement of regulatory compliance and occupancy tax strategy for short term rentals
49. Increase engagement with government, community, and industry stakeholders to address housing affordability and availability
50. Use Generative AI technology like ChatGPT for marketing, sales and other purposes

DestinationNEXT Scenario Model

The DestinationNEXT Scenario Model & Assessment Tool is a diagnostic community platform to measure how local stakeholders perceive the overall competitiveness of the destination's visitor economy.

The Scenario Model

The DestinationNEXT Scenario Model & Assessment Tool is the only strategic framework for destinations of its kind. It is based on a comprehensive online survey that destination organizations deliver to key industry and community stakeholders in the region. Survey participants are asked to rank the performance of 24 variables related to destination strength and community alignment.

The self-guided survey identifies the most significant opportunities and challenges in the destination related to both the quality of the visitor experience and how well the local community is aligned around shared goals. The resulting data offers destination leaders a wealth of in-depth data to support better decision-making with their Board and staff.

The data is plotted into the DestinationNEXT Scenario Model below in one of four quadrants, each of which provides specific strategies for the participating destination. The individual plot can also be compared against more than 350 other destinations that have gone through the DestinationNEXT survey process. And, the assessment results provide a robust community engagement platform that fosters conversation among stakeholders to develop a shared vision for the future of the destination.

The DestinationNEXT survey can also be customized with additional questions to address issues specific to the community.
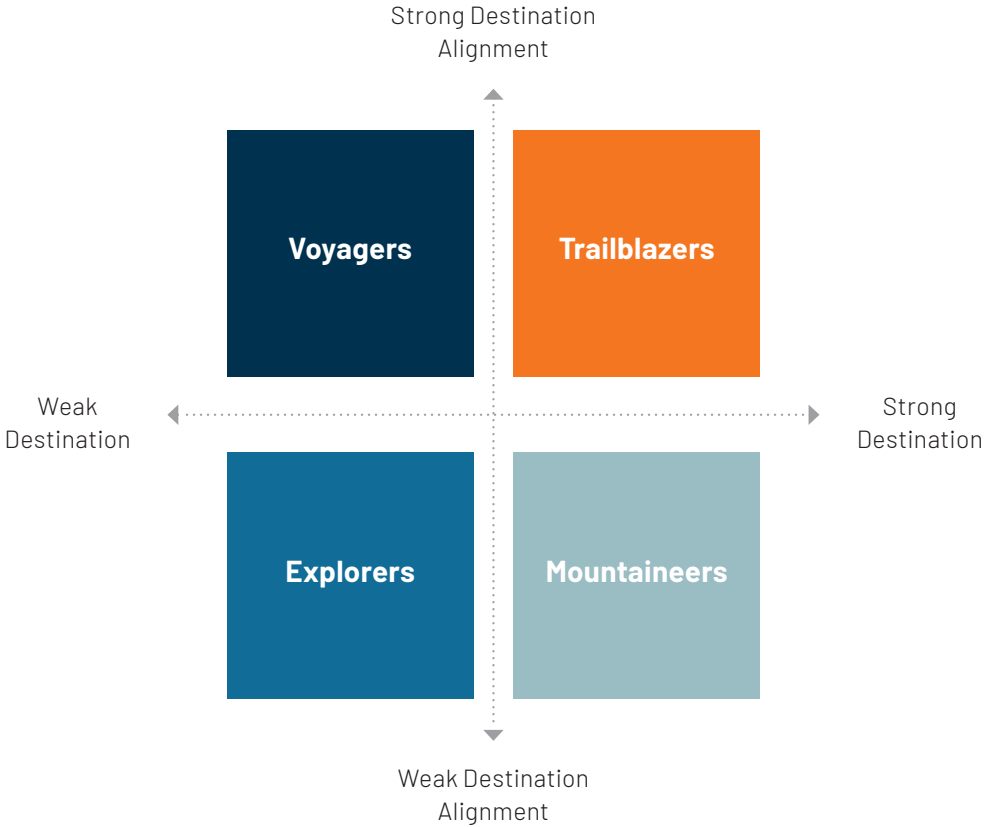
DestinationNEXT Assessment

The 24 variables in the DestinationNEXT Assessment are:

Business Event Strategies

- Accommodation
- Attractions & Experiences
- Arts, Culture & Heritage
- Communication Infrastructure
- Destination Access
- Dining, Shopping & Entertainment

- Health & Safety
- Events & Festivals
- Local Mobility & Access
- Meetings & Conventions
- Outdoor Recreation
- Sports Tourism & Events

Destination Alignment

- Business Support
- Community & Resident Support
- Economic Development
- Emergency Preparedness
- Equity, Diversity & Inclusion
- Funding Support & Certainty

- Government Support
- Hospitality Culture
- Organization Governance
- Regional Cooperation
- Sustainability & Resilience
- Workforce Development

Appendices

A. **Strategies by Region**

B. **Advisory Panels**

C. **Survey Participants (Countries)**

Strategies by Region

	USA	Canada	LATAM	EMEA	Asia Pacific
1. Protect revenue sources to maintain current funding levels	1	2	20	14	2
2. Focus on developing authentic experiences for the customer	3	4	4	9	4
3. Better integrate tourism and economic development	8	15	2	5	1
4. Build the destination brand around the community's goals, values and creative energy	6	3	7	8	3
5. Have a greater role in destination and product development	7	1	8	2	16
6. Develop a destination master/management plan to define long-term strategy	12	11	3	4	6
7. Increase capabilities in data management for business intelligence, marketing and community engagement	10	5	5	11	5
8. Focus significant attention on content creation and dissemination	4	10	11	10	8
9. Develop a data-driven plan for a more sustainable visitor economy	17	8	12	1	9
10. Align the visitor experience and quality of life for residents in my community	2	9	22	27	23
11. Increase our organization's knowledge of innovative technologies	14	16	10	3	14
12. Increase efforts to attract and retain our organization's talent	13	17	13	17	7
13. Increase support with local government leadership to influence policy	9	19	17	12	18
14. Develop and support new events in the destination	22	14	1	7	15
15. Improve local resident sentiment to increase support for the visitor economy	11	6	29	21	19
16. Develop new KPIs to better measure the economic and social impact of the visitor economy beyond visitor volume	16	7	19	16	11
17. Play more of a central role in advocacy in my destination	5	30	30	6	29
18. Enhance engagement with the local community to manage considerations for our visitor economy	15	12	27	18	12
19. Protect and help steward the future of our natural environment	25	13	14	15	10
20. Improve accessibility for people of all abilities throughout the destination	19	22	23	13	21
21. Increase industry promotion to promote tourism as a career path and support workforce development	21	29	15	33	22
22. Improve equity, diversity and inclusion across the organization (staff & Board)	20	18	33	20	17
23. Diversify revenue sources to expand current funding levels	28	21	18	30	13
24. Increase support for local small businesses and community groups	23	20	32	25	32
25. Leverage our region's priority economic sectors to generate business events	31	32	6	19	27
26. Improve Board development and governance	27	27	24	37	26

Strategies by Region

	USA	Canada	LATAM	EMEA	Asia Pacific
27. Expand mandate to broaden our impact and relevance in the community	18	25	38	29	37
28. Expand support for local arts and cultural organizations	26	24	34	39	36
29. Increase efforts to develop the region's sports tourism market	24	26	36	43	40
30. Actively encourage policy makers to reduce barriers to travel	33	31	26	38	25
31. Develop a bleisure/blended travel (combined business & leisure travel) initiative with partners	35	36	9	24	20
32. Lead and support initiatives to address industry workforce shortages	32	34	31	42	28
33. Develop strategies and policies to improve equity, diversity & inclusion in our vendor network	30	28	40	22	34
34. Pay close attention to safety, health, and security as a strategic consideration	37	45	16	34	30
35. Support development for businesses operated by members of underserved communities (e.g., Black, Brown, Indigenous, etc.)	29	23	42	47	45
36. Increase collaboration with local community organizations to address social issues	36	35	41	31	31
37. Increase use of incentives to attract events	38	33	35	36	42
38. Work more closely with airlines to build and promote air routes	42	37	21	26	39
39. Expand efforts to help develop and promote local neighborhoods	39	40	46	23	24
40. Develop a more comprehensive crisis management strategy	41	41	39	41	33
41. Increase client support for event legacy goals that positively impact local communities and support human rights management	45	42	25	28	44
42. Support improvement of regulatory compliance and occupancy tax strategy for short term rentals	34	43	44	50	50
43. Use Generative AI technology like ChatGPT for marketing, sales and other purposes	44	39	45	32	38
44. Increase engagement with government, community, and industry stakeholders to address housing affordability and availability	40	38	48	46	47
45. Attract more remote workers to visit the destination for extended stays	47	46	43	44	35
46. Develop a resident advisory committee/council to promote greater community and resident engagement	46	44	47	45	46
47. Increase involvement in risk assessment/mitigation strategies for business events	48	47	37	35	41
48. Increase engagement with government, community, and industry stakeholders to address homeless/mental health issues	43	48	50	49	49
49. Increase advocacy efforts regarding border trade and travel restrictions	49	49	49	40	43
50. Consider mergers with other organizations (e.g., economic development, government departments, chambers of commerce, etc.	50	50	28	48	48

Advisory Panels

Disruptors Panel

Brandon Beachum
HelloVacay

Zeek Coleman
Tourism Economics

Darren Dunn
Zartico

Deborah Edwards
Carmel Foley
University of Technology Sydney

Conor Grennan
NYU Stern School of Business

Dan Holowack
Crowdriff

John Matson
Location Engine

Steven Paganelli
Tripadvisor

Rich Reasons
Simpleview

Vail Ross
STR Report

Janette Rousch
New York City Tourism + Conventions

Industry Panel

Sven Bossu
AIPC, International Association
of Convention Centres

Don Cleary
Marriott Hotels

Michael Dominguez
Associated Luxury Hotels International

David Dubois
IAEE (International Association of
Exhibitions and Events)

Ben Erwin
Encore Global (formerly PSAV)

Senthil Gopinath
The International Congress and Convention
Association (ICCA)

Kai Hattendorf
UFI, The Global Association of
the Exhibition Industry

Nejc Jus
World Travel & Tourism Council (WTTC)

Sherrif Karamat
Professional Convention Management
Association (PCMA)

John Lambeth
Civitas

Heike Mahmoud
Hamburg Messe und Congress GmbH

Beth Potter
Tourism Industry Association of Canada

Paul Pruangkarn
Pacific Asia Travel Association

Advisory Panels

Community Panel

Guy Bigwood
Global Destination Sustainability Index

Jonathon Day
Global Sustainable Tourism Council (GSTC)

Teresa Ryder
Indigenous Tourism Association of Canada

Jake Steinman
TravelAbility Summit

Marcus Carney
Visit Yuma

Cathy Ritter
Better Destinations

Angela Nagy
Green Step Canada

Martin Robertson
Edinburgh Napier University

John Tibbits
Colleges Ontario

Lakshmee Lachhman-Persad
Accessible Travel NYC

Karyl Leigh Barnes
Development Counsellors International (DCI)

Greg Takehara
Tourism Cares

Sophia Hyder-Hock
Destinations International

Client Panel

Eric Abramson
GL Events Venues

Lisa Astorga
International Society on Thrombosis &
Haemostasis

Alessandro Corteze
European Society for Radiotherapy and Oncology
(ESTRO)

Nina Freyson-Pretorius
The Conference Company

Ben Hainsworth
The European Association for the Study of the
Liver (EASL)

Mike Blackman
Robin Lokerman
MCI Group

Paula Rowntree
Australian Psychology Association / AIEM
Ambassador

Jan Tonkin
The Conference Company

Leslie Zeck
International Association of Dental Research

Survey Participants

Argentina

Convention & Visitors Bureaus Latam & El Caribe
Club Med
Iguazu Convention Bureau
National Institute for Tourism Promotion, INPROTUR
Costa Rican Tourism Board, ICT
Mendoza Convention & Visitors Bureau
Visit Buenos Aires

Aruba

Aruba Tourism Authority

Australia

BE Sydney
Business Events Adelaide
City of Melbourne
Destination Gold Coast
Southern Queensland Country Tourism
Tourism Tropical North Queensland
Tourism Whitsundays
Townsville Enterprise

Azerbaijan

Azerbaijan Tourism Board

Barbados

Barbados Tourism Marketing Inc.

Belgium

Antwerp & Partners Convention Bureau
Visit Bruges
Visit FLanders Convention Bureau

Belize

Belize Tourism Board

Bermuda

Bermuda Tourism Authority

Bolivia

Chamber of Industry and Commerce, CAINCO

Brazil

Brazilian Association of Congress Organizers, ABEOC
Accor Hotels
Atibaia e Região Convention Visitors Bureau
Balneário Camboriú Convention & Visitors Bureau
Bonito Convention & Visitors Bureau
Brasília e Região Convention & Visitors Bureau
Costa dos Corais Convention & Visitors Bureau - Alagoas
Curitiba Convention & Visitors Bureau
Destination São José dos Campos
Brazilian Tourism Board, EMBRATUR
Espirito Santo Convention & Visitors Bureau
Goiania Convention & Visitors Bureau
Gramado, Canela Convention & Visitors Bureau Região das Hortênsias
Guarulhos Convention & Visitors Bureau
Guarujá Convention & Visitors Bureau
Joinville e Região Convention & Visitors Bureau
Maceió Convention & Visitors Bureau
Prefeitura Municipal de Serra Negra
Paraty Convention & Visitors Bureau
Pipa Convention & Visitors Bureau

Survey Participants

Porto Alegre e Região Metropolitana Convention & Visitors Bureau

Porto de Galinhas Convention & Visitors Bureau

Recife Convention & Visitors Bureau

São Paulo Convention and Visitors Bureau

Salvador Destination

State Tourism Board, Sao Pablo

Visit Iguassu

Visit Ceara

Canada

BLLT

BMO Centre at Stampede Park

Calgary TELUS Convention Centre

Canadian Tours International

Central Coastal Tourism

Central Counties Tourism

Centre des congrès de Québec

City of Brampton

City of Maple Ridge

Cypress Hills Destination Area Inc

Destination Battlefords

Destination BC

Destination Canada

Destination Cape Breton

Destination Greater Victoria

Destination Labrador

Destination St. John's

Destination Toronto

Destination Vancouver

Destination Toronto

Discover Halifax

Discover Saskatoon

Eastern Manitoba Tourism Association

Envision Saint John: The Regional Growth Agency

Exhibition Place

Explore Edmonton

Explore Waterloo Region

Fairmont Royal York

Fredericton Tourism

Go Western Newfoundland

Hamilton Halton Brant Regional Tourism Association

Kenora Hospitality Alliance

Lanark County Tourism

Look Ahead Consulting

Mighty Peace Tourism

Nakusp & District Chamber Of Commerce and Visitor Centre

Nelson Kootenay Lake Tourism

Niagara Falls Tourism

Oak Bay Beach Hotel

Ontario's Highlands Tourism Organization

Ottawa Tourism

Oxford County

Pacific Destination Services

Pacific Destination Services Inc.

Palais des congrès de Montréal

Parksville Qualicum Beach Tourism

Pursuit Collection

Quebec City Business Destination

Red River North Tourism Inc.

Regional Tourism Organization 4 In.

Regional Tourism Organization 8

Sunshine Coast Tourism

Thompson Okanagan Tourism Association

Tourism Barrie

Tourism Burnaby

Tourism Calgary

Tourism Canmore Kananaskis

Tourism Golden

Tourism Jasper

Tourism Kamloops

Survey Participants

Canada

Tourism Kingston

Tourism Langley

Tourism Mississauga

Tourism North Bay Association

Tourism Prince George

Tourism Red Deer

Tourism Richmond

Tourism Saskatchewan

Tourism Simcoe County

Tourism Ucluelet

Tourism Whistler

Tourism Windsor Essex Pelee Island

Tourism Winnipeg

Tourism Yukon

Tourisme Montréal

Travel Alberta

Travel Drumheller

Travel Manitoba

Visit Northwest Territories

Chile

Aysen Bureau

Santiago Convention Bureau

Tourism and Cultural Corporation, Puerto Varas

Municipality of Puerto Varas

National Tourism Services, SERNATUR

Los Lagos Tourism Services

Viña del Mar Convention Bureau

Visit Puerto Varas Convention Bureau

Colombia

Latin American Association of Tourism Professionals, ASOPROTURLA

Colombian Association of Trade Shows & Congresses & related industries, AIFEC

Guadalupe City Hall

Colombian Association of Event Organizers and Service Providers

Barranquilla Chamber of Commerce

Cali Valle Bureau

Cartagena de Indias Convention & Visitors Bureau

Government of Valle del Cauca

Greater Bogota Convention Bureau

Greater Medellin Convention & Visitors Bureau

Ibagué Conventión & Visitors Bureau

Pereira Convention Bureau

ProColombia

Santiago de Cali Tourism Secretariat

Costa Rica

Costa Rica Convention Bureau

Croatia

Dubrovnik Tourist Board

Cuba

Cuba Ministry of Tourism

Czech Republic

Tourist Authority South Moravia

Survey Participants

Denmark

Copenhagen Convention Bureau

CruiseCopenhagen / Cruise Baltic

Wonderful Copenhagen

Dominican Republic

Dominican Republic Tourism Board

Santo Domingo Hotel Association

National Association of Tour Operator, OPETUR

Punta Cana Tourism Cluster

Sansouci Ports

Ecuador

Manta Tourist Bureau Foundation

Quito Turismo

El Salvador

El Salvador Tourism Corporation, CORSATUR

Tourism Federation, FETUR

Estonia

Estonian Convention Bureau

Finland

Finland Convention Bureau

Visit Oulu

France

Onlylyon Convention Bureau

Germany

Düsseldorf Convention Bureau

German Convention Bureau

The Nuremberg Convention and Tourist Office

visitBerlin

Greece

Athens Development & Destination Management Agency

Guatemala

Guatemala Convention Bureau

Chamber of Tourism of Guatemala, CAMTUR

Honduras

San Pedro Sula Conventions Bureau

Tegucigalpa Meetings Cluster

Hungary

Budapest Convention Bureau

India

Indian Convention Promotion Bureau

Indonesia

Ministry of Tourism and Creative Economy, Indonesia

Survey Participants

Ireland

Dublin Convention Bureau

FÃiilte Ireland

Galway Convention Bureau

Kerry Convention Bureau

Israel

Expo Tel Aviv

Jerusalem Development Authority

Tel Aviv Global and Tourism

Italy

Destination Florence Convention & Visitors Bureau

Turismo Torino e Provincia

Japan

Agematsu Town Tourism Association

Akita Inu Tourism

Akita Shirakami Tourism

Alps inc.

Aso Design Center

Chiba Prefectural Tourism & Local Products
Association

Chichibu Omotenashi Tourism Organization

Higashikishu Regional Organization

Hiraizumi-Ichinoseki Destination Management
Organization

Hitoyoshi- Kuma Tourism Regional Development
Council

Japan Travel and Tourism Association

Kamaishi Destination Management Company

Kazuno Destination Management Organization

Kitaakita Tourism & Local Products Association

Kirinnomachi Tourist Bureau

Koriyama City Tourist Association

Kushiro Tourism & Convention Association

NachiKatsuura Tourism Organization

Niigata Prefectural Tourist Association

Niseko Promotion Board

Oki Islands Geopark Management Bureau

Osaka Convention & Tourism Bureau

Osaka International Business Promotion Center

Osumi Destination Marketing Organization

Sado Tourism Association

Saitama Prefecture Products & Tourism Association

Sakai Machizukuri Authority Co., Ltd.

San`in Tourism Organization

Sapporo Convention Bureau

Shimanami Japan

The Tourism Bureau of Nasushiobara City

Tohoku Tourism Promotion Organization

Tokyo Convention & Visitors Bureau

Towada Travel

Toyohashi Visitors & Convention Association

Toyonokuni Millennium Heritage Tourism Zone

Visit Hachinohe

Wakayama City Tourist Association

Yawatahama Hometown Tourism Corporation

Mexico

Mexican Association of Destination Management
Companies, AMDEMAC

Mexican Association of Professionals in Trade
Shows, Exhibitions, Congresses, & Conventions,
AMPROFEC

Southern Tamaulipas Hotel Association

Aguascalientes Congress and Visitors Bureau

Survey Participants

Ciudad Juarez Chamber of Commerce

Tourism Cluster of Nuevo León

Tourism Council of Puebla

Zacatlan Tourism and Economic Development Organization

La Paz Tourism

Mexico City Tourism Board

Kenes Group

Mexican Caribbean Tourism Board

Durango Convention & Visitors Bureau

Hermosillo Convention & Visitors Bureau

Monterrey Convention & Visitors Bureau

Saltillo Convention & Visitors Bureau

Culiacan Convention & Visitors Bureau

Tamaulipas Convention & Visitors Bureau

Yucatán Convention & Visitors Bureau

Ixtapa Zihuatanejo Convention & Visitors Bureau

Torreón Convention & Visitors Bureau

Guadalajara Convention & Visitors Bureau

RX Global

San Luis Capital Tourism Secretariat

Tourism Development Secretariat, State of Yucatan, SEFOTUR

Tourism Secretariat, State of Nuevo León

Tourism Secretariat, State of Sinaloa

Tourism Secretariat, State of Guanajuato

Visit Los Cabos

Vive Puebla

Netherlands

Netherlands Board of Tourism and Conventions

Netherlands Board of Tourism & Conventions

Rotterdam Partners

The Hague & Partners

Toerisme Veluwe Arnhem Nijmegen

New Zealand

Tourism New Zealand

Nicaragua

DMCs of Nicaragua

Panama

AMETUR

National Association of Restaurants, ARAP

Association of Gaming Administrators of Panama, ASAJA

Panamanian Association of Tour Operators , APOTUR

Association of Tourist Guides of Panama, AGTP

Chamber of Commerce of Panama

Chamber of Tourism of Veraguas

Copa Airlines

Panamanian Association of Event Organizers and Service Provider, APPCE

PROMTUR Panama

Ministry of Culture

Paraguay

Asuncion Convention & Visitors Bureau

Peru

Arequipa Convention Bureau

Iquitos Convention Bureau

Lima Convention Bureau

Ministry of Commerce and Tourism, MINCETUR

PROMPERU

Survey Participants

Poland

Convention Bureau - WrocÅ, aw

Portugal

Porto and North of Portugal Tourism Board

Qatar

Qatar Tourism

Rwanda

Rwanda Convention Bureau

Saudi Arabia

Royal Commission for AlUla

Singapore

Singapore Tourism Board

Slovenia

Ljubljana Tourism

South Africa

Cape Town Tourism
South Africa National Convention Bureau

South Korea

Goyang Conventions & Visitors Bureau

Spain

Turisme De Barcelona

Sweden

Malmö Convention Bureau
Uppsala Convention Bureau
Visit Stockholm

Switzerland

MCI Group
Switzerland Convention & Incentive Bureau (SCIB)

Thailand

Thailand Convention & Exhibition Bureau (TCEB)

Turkey

Turkey Tourism Promotion and Development Agency

Ukraine

Lviv Tourism Office

United Arab Emirates

Abu Dhabi Convention & Exhibition Bureau

Survey Participants

United Kingdom

Destination Vancouver

Liverpool Convention Bureau

London & Partners

Marketing Manchester

Visit West

VisitBritain/VisitEngland

VisitScotland

United States

7 Cedars

AirDNA

Allen Convention and Visitors Bureau

Alpharetta Convention & Visitors Bureau

Amelia Island Convention & Visitors Bureau

Anderson Madison County Visitors Bureau

Arkansas Tourism

Arlington Convention & Visitors Bureau

Asociación de Profesionales del Turismo Latino&Américano (ASOPROTURLA))

Aspen Chamber Resort Association

Beverly Hills Conference & Visitors Bureau

Birch Run Convention & Visitors Bureau

Black Hills & Badlands Tourism Association

Boulder Convention and Visitors Bureau

Discover Puerto Rico

Brand USA

Branson Lake Chamber of Commerce / Convention & Visitor Bureau

Cabarrus County Convention and Visitors Bureau

Calhoun County Visitors Bureau

Catch Des Moines

Charlotte Regional Visitors Authority

City of Port Angeles

City of Roseville

City of Sequim

City of Temple

Columbia Convention and Visitors Bureau

Coos Bay-North Bend-Charleston Visitor & Convention Bureau

Corsicana Visitors Bureau

Darien-McIntosh County Chamber of Commerce

Dayton Convention & Visitors Bureau

Daytona Beach Area Convention & Visitors Bureau

Destination Ann Arbor

Destination Augusta

Destination Bryan

Destination Cleveland

Destination DC

Destination Gettysburg

Destination Lancaster

Destination Madison

Destination Mansfield-Richland County

Destination Marketing Corp.

Destination Missoula

Destination Niagara USA

Destination North Myrtle Beach

Destination Rogers

Destinations International

Destin-Fort Walton Beach

Discover Albany

Discover Denton Texas

Discover Durham

Discover Green Bay

Discover Kalamazoo

Discover Lehigh Valley

Discover Monroe-West Monroe

Discover Puerto Rico

Discover The Palm Beaches

DistiNCtly Fayetteville

Division of Tourism, Film and Arts

Survey Participants

United States

Dominican Republic Tourism Board

Elgin Area Convention & Visitors Bureau

Experience Champaign-Urbana

Experience Grand Rapids

Experience Kissimmee

Experience Olympia & Beyond

Experience Scottsdale

Explore Brookhaven

Explore Butts County/Butts County Chamber of Commerce

Explore Fairbanks

Explore Whitefish

Extreme Tours

Fairbanks Convention and Visitors Bureau dba Explore Fairbanks

Fargo-Moorhead Conventions & Visitors Bureau

Finger Lakes Visitors Connection

Fort Myers-Islands, Beaches & Neighborhoods

Fox Cities Convention & Visitors Bureau

Fredericksburg Convention and Visitor Bureau

Georgia Association of Convention & Visitors Bureaus, Inc. (GACVB)

Glacier Country Tourism

Global Meetings and Tourism Specialists

GO-CAL, Greater Ontario California

Great Rivers & Routes Tourism Bureau

Greater Birmingham Conventions & Visitors Bureau

Greater Lansing Conventions & Visitors Bureau

Greater Raleigh Convention and Visitors Bureau

Greater Springfield Conventions & Visitors Bureau

Greenbrier County Conventions & Visitors Bureau

Greene County Tourist Promotion Agency

Gulf Shores & Orange Beach Tourism

Hamilton County Tourism, Inc.

Hancock County Tourism & Visitor Center

Hawaii Tourism Authority

Hawai'i Visitors & Convention Bureau

Hello Burlington

Hocking Hills Tourism Association

Irving Convention & Visitors Bureau

Jackson County Tourism Development Authority

JB Imports

Johnston County Visitors Bureau

Kingbird Innovation Center

Lafayette Convention & Visitors Commission

Shipshewana LaGrange County Visitors Bureau

Leavenworth Convention and Visitors Bureau

Los Angeles Tourism & Convention Board

Los Angeles Tourism Board

Louisville Tourism

Low Point LLC.

Maine Office of Tourism

Myrtle Beach Area Chamber of Commerce/ Convention & Visitors Bureau

Monterey County Convention & Visitors Bureau

Meet Minneapolis

meetNKY

Memphis Tourism

Michigan's Great Lakes Bay Region

Minnesota State Fair/Board Member Visit Roseville

Mobile Convention & Visitors Corp d/b/a Visit Mobile

Monterey County Convention and Visitors Bureau

Mt. Hood and Columbia River Gorge Regional Tourism Alliance

Mt. Hood Territory - Clackamas County

Myrtle Beach Area Chamber & Convention & Visitors Bureau

Nashville Convention & Visitors Corp

NCVC

New Smyrna Beach Area Visitors Bureau

North Little Rock Convention & Visitors Bureau

Northstar Meetings Group

Survey Participants

Ocala/Marion County Visitor and Convention Bureau

Ohio Travel Association

Olympic Peninsula Visitor Bureau

Orange County Tourism & Film

Pocono Mountains Visitors Bureau

Providence Warwick Convention & Visitors Bureau

Pulaski County Tourism Bureau

Punta Gorda/Englewood Beach Visitor & Convention Bureau

Regenerative Resource Partners

Reno Tahoe

Richmond Region Tourism

ROOST

San Juan Islands Visitors Bureau

Sequim Lavender Experience

SoIN Tourism

Springfield MO Convention and Visitors Bureau

Steamboat Springs Chamber

Taste Newberg

The Happy Valley Adventure Bureau

The Resort at Port Ludlow

Tour Stafford

Tourism Economics

Travel Butler County Ohio

Travel Costa Mesa

Travel Juneau

Travel Lane County

Travel Michigan

Travel Portland

Travel Santa Ana

Trumbull County Tourism

Valley Forge Tourism

Vidalia CVB

Virgin Media

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Visit Alexandria

Visit Anaheim

Visit Anchorage

Visit Aurora

Visit Austin

Visit Baton Rouge

Visit Beloit

Visit Bentonville

Visit Billings

Visit Bloomington

Visit Boise

Visit Bucks County

Visit Buffalo Niagara

Visit Carlsbad

Visit Carson Valley

Visit Central Oregon

Visit Charlotte - CRVA

Visit Chelan County

Visit Cheyenne

Visit Clarksville

Visit Clearfield County

Visit College Station

Visit Colorado Springs

Visit Cook County

Visit Corpus Christi

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Visit El Paso

Visit Escanaba

Visit Estes Park

Visit Fort Wayne

Visit Fort Worth

Visit Frisco

Visit Galveston

Visit Glenwood Springs

Visit Grand Junction

Survey Participants

United States

Visit Greater Palm Springs
Visit Harford
Visit Hershey & Harrisburg
Visit Houston
Visit Indy
Visit Issaquah
Visit Jackson
Visit Kitsap Peninsula
Visit LaGrange, Inc.
Visit Lake Charles
Visit Lake County
Visit Lauderdale
Visit Lenawee
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VISIT Milwaukee
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Visit Napa Valley
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Visit Quad Cities
Visit Raleigh
Visit Rancho Cordova
Visit Rapid City
Visit Roseville

Visit Sacramento
Visit San Jose
Visit Santa Barbara
Visit Sarasota County
Visit Savannah
Visit Seattle
Visit Shreveport-Bossier
Visit SLO CAL
Visit Spokane
Visit St. Pete/Clearwater
Visit Stockton
Visit Sun Valley
Visit Tampa Bay
Visit Temecula Valley
Visit Tucson
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Visit Yuma
VisitGreenvilleSC
VisitLEX
VisitLexington
VisitNorfolk
VisitPITTSBURGH
VisitSI
Walton County Tourism Department
Western National Parks Association
Wilmington and Beaches Convention & Visitors
Bureau
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Uruguay

Montevideo Convention Bureau

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