

2023 | FUTURES STUDY

# A Strategic Road Map for the NEXT Generation of Destination Organizations



DESTINATION  
**N→XT**

**MM  
GY** 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.



## 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.

## 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.

## 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.

## 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.

# 2023

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# Global Advisory Group

**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 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.

**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.

**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 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

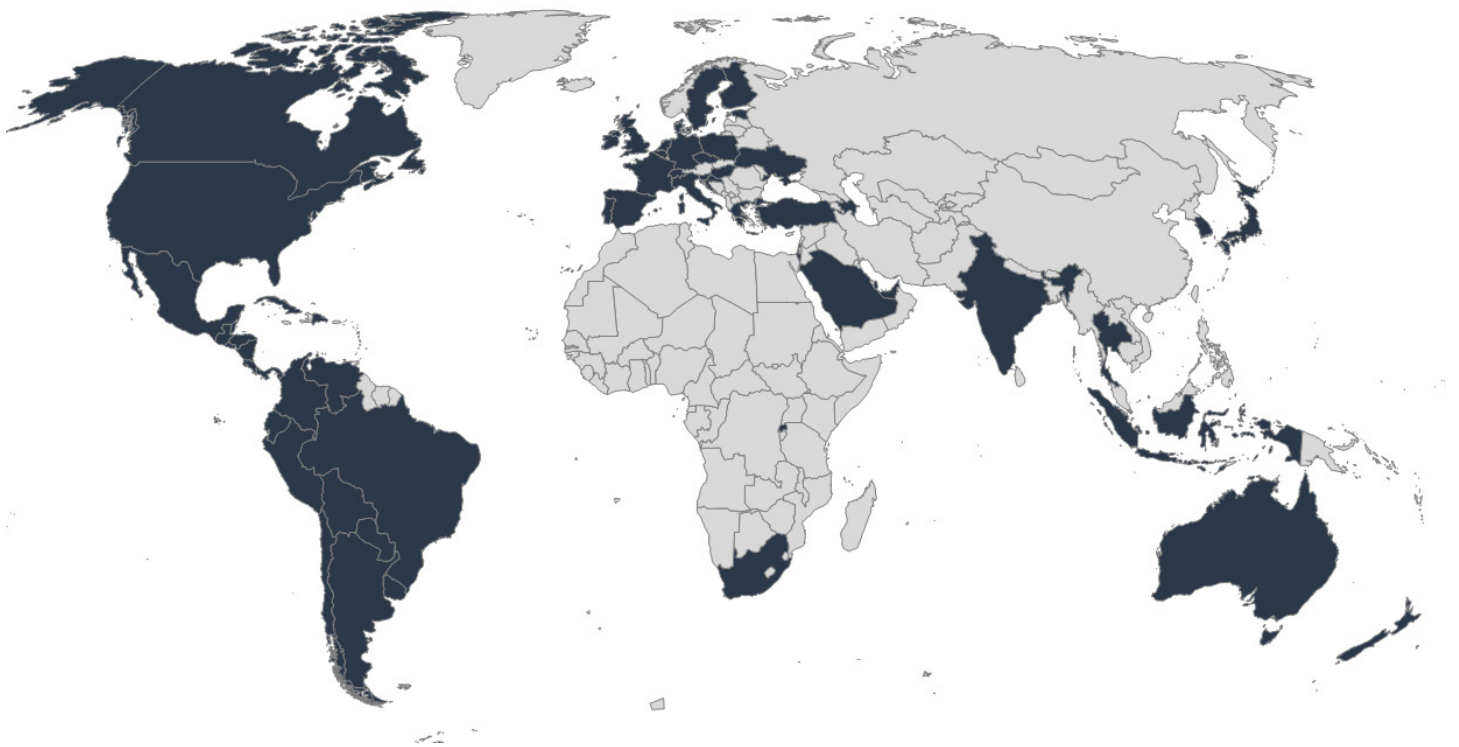
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**Two global surveys were distributed in Q2 2023 for participants to rank the industry trends and organization strategies. The Global Advisory Group, a wide selection of young industry leaders, and the project team responded to the trends survey. The 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:**

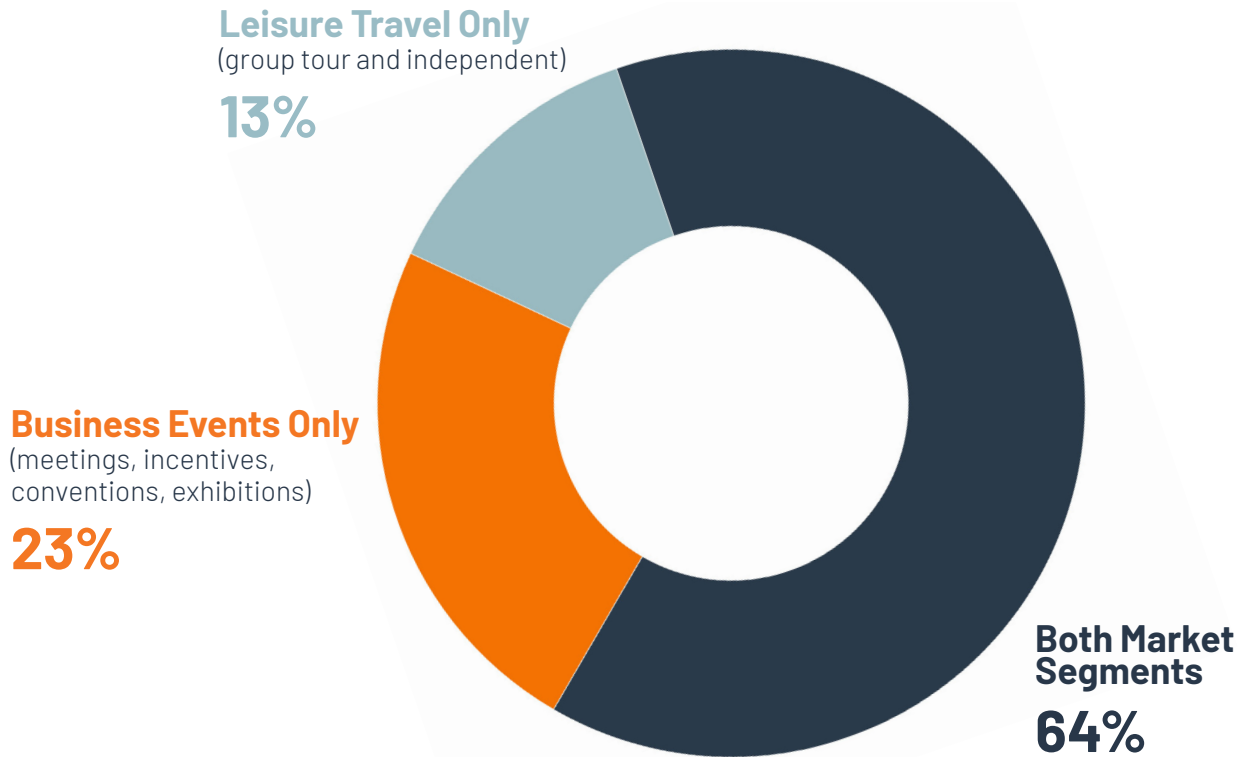
- Business and governance profiles of the destination organization
- Key trends impacting the industry and global visitor economy
- Destination organization strategies in response to key trends
- Current roles and key performance indicators for the organization, as well as ideal roles and KPIs in the future
- Future-proofing options for destination organizations to adapt to global socioeconomic and environmental shifts





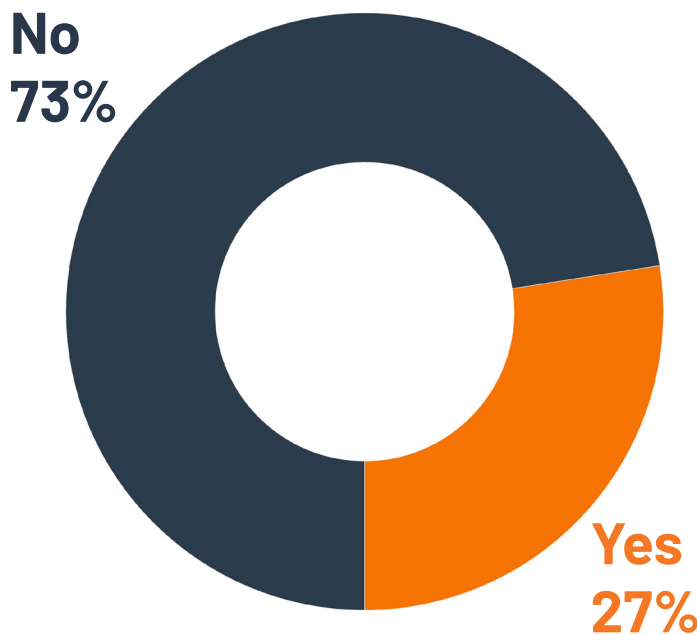
Argentina	Costa Rica	Greece	Nicaragua	Spain
Aruba	Croatia	Guatemala	Panama	Sweden
Australia	Cuba	Honduras	Paraguay	Switzerland
Azerbaijan	Czech Republic	Hungary	Peru	Thailand
Barbados	Denmark	India	Poland	Turkey
Belgium	Dominican Republic	Indonesia	Portugal	Ukraine
Belize	Ecuador	Ireland	Qatar	United Arab Emirates
Bermuda	El Salvador	Israel	Rwanda	United Kingdom
Bolivia	Estonia	Italy	Saudi Arabia	United States
Brazil	Finland	Japan	Singapore	Uruguay
Canada	France	Mexico	Slovenia	Venezuela
Chile	Germany	Netherlands	South Africa	
Colombia		New Zealand	South Korea	

# Market Segment

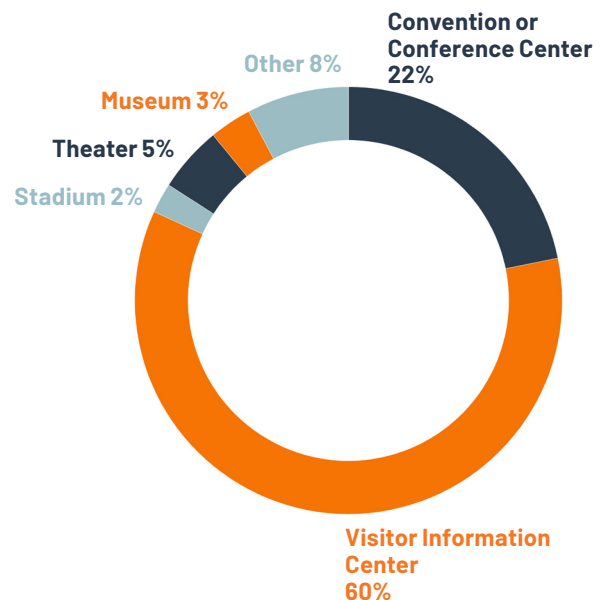


## Facilities

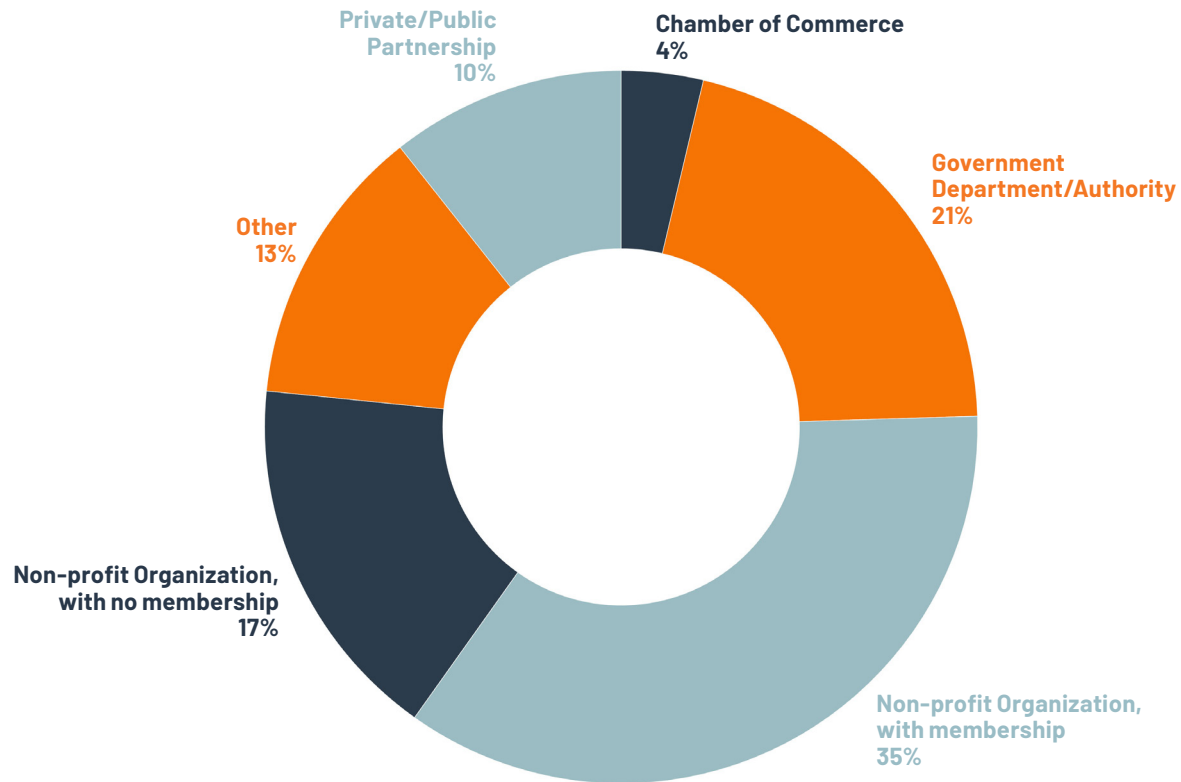
Do you operate a facility?



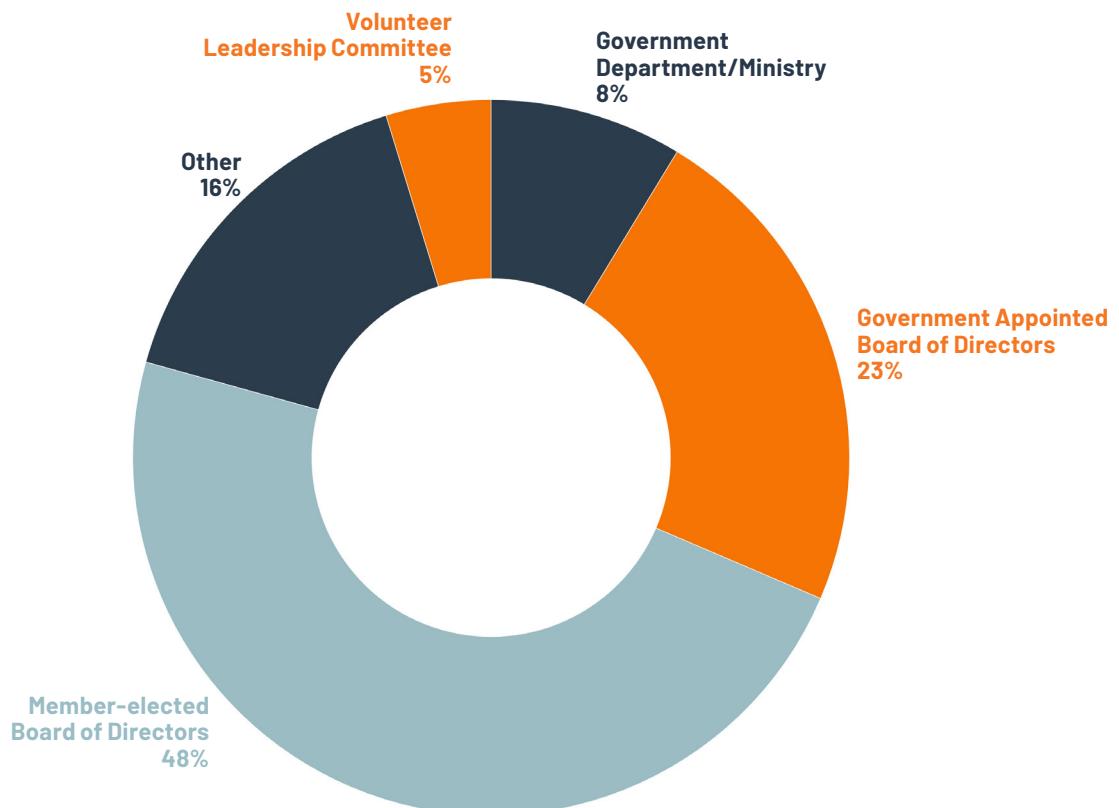
If yes, what kind?



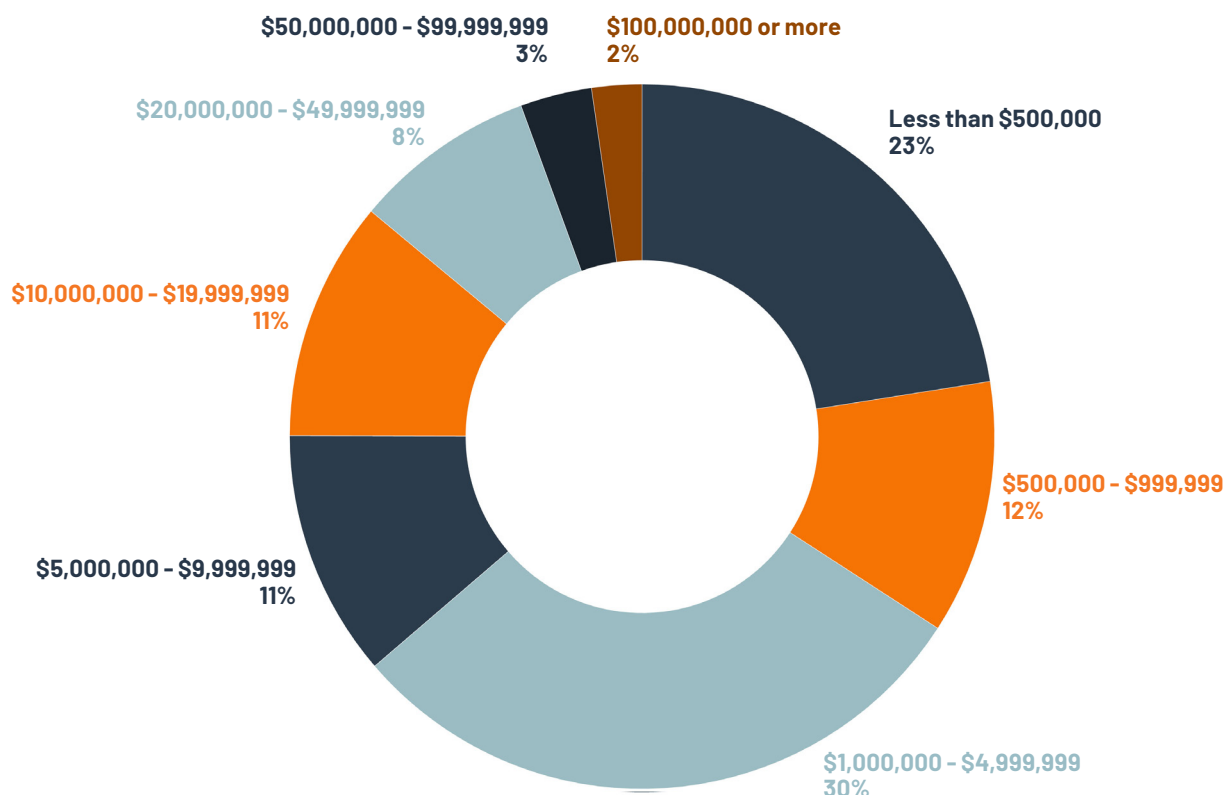
# Business Model



# Governance Model

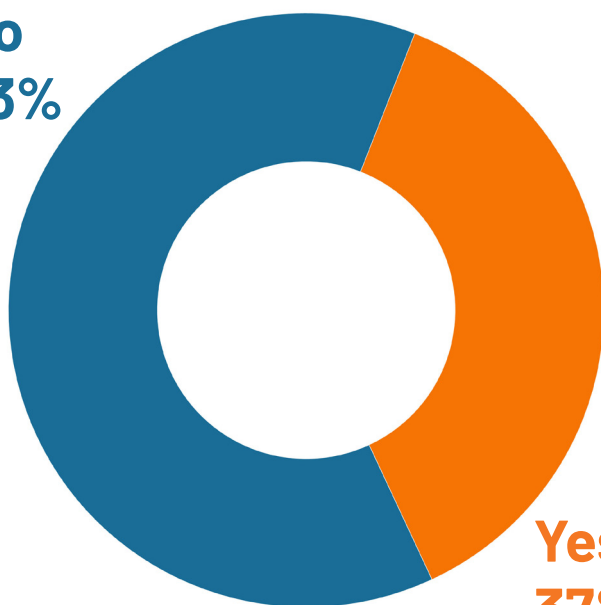


# Budget Profile

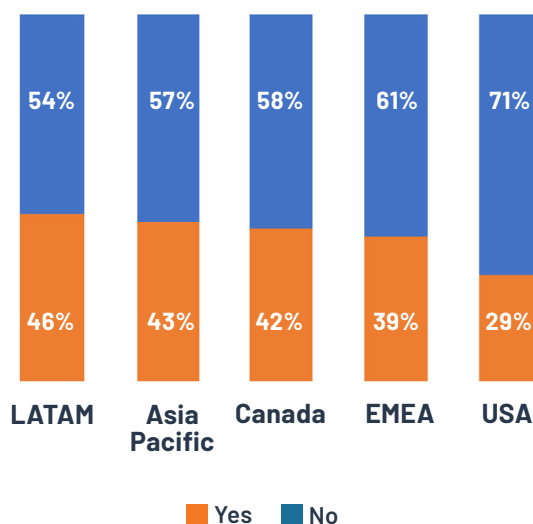


Is any of your current funding at risk of being reduced or eliminated in the next three years?

No  
63%



Yes  
37%



# 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 **+27** 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.

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

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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.



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

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**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

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## **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 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

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**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.

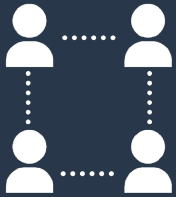
## Relevant Trends

- 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 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
- 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.**

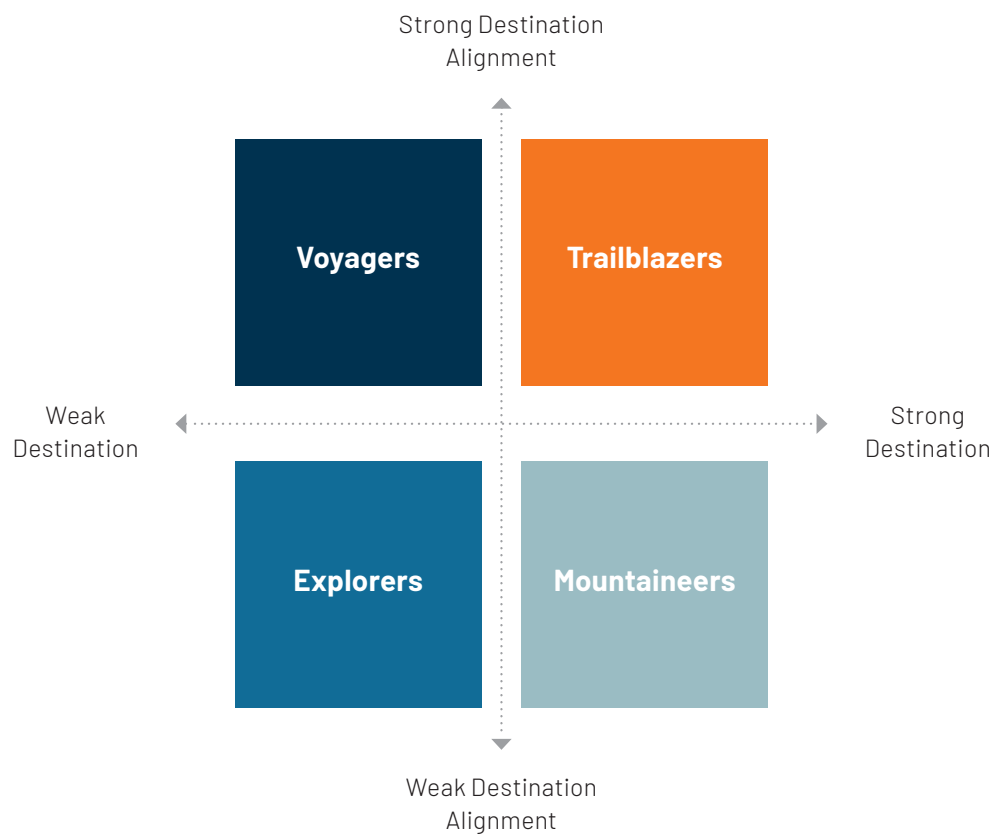
# The Scenario Model

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  
Espírito 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 Convención & 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  
Fáilte 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  
Aguaascalientes 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 – Wrocław, 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&Américo (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	Hawaii Tourism Authority
Elgin Area Convention & Visitors Bureau	Hawai'i Visitors & Convention Bureau
Experience Champaign-Urbana	Hello Burlington
Experience Grand Rapids	Hocking Hills Tourism Association
Experience Kissimmee	Irving Convention & Visitors Bureau
Experience Olympia & Beyond	Jackson County Tourism Development Authority
Experience Scottsdale	JB Imports
Explore Brookhaven	Johnston County Visitors Bureau
Explore Butts County/Butts County Chamber of Commerce	Kingbird Innovation Center
Explore Fairbanks	Lafayette Convention & Visitors Commission
Explore Whitefish	Shipshewana LaGrange County Visitors Bureau
Extreme Tours	Leavenworth Convention and Visitors Bureau
Fairbanks Convention and Visitors Bureau dba Explore Fairbanks	Los Angeles Tourism & Convention Board
Fargo-Moorhead Conventions & Visitors Bureau	Los Angeles Tourism Board
Finger Lakes Visitors Connection	Louisville Tourism
Fort Myers-Islands, Beaches & Neighborhoods	Low Point LLC.
Fox Cities Convention & Visitors Bureau	Maine Office of Tourism
Fredericksburg Convention and Visitor Bureau	Myrtle Beach Area Chamber of Commerce/Convention & Visitors Bureau
Georgia Association of Convention & Visitors Bureaus, Inc. (GACVB)	Monterey County Convention & Visitors Bureau
Glacier Country Tourism	Meet Minneapolis
Global Meetings and Tourism Specialists	meetNKY
GO-CAL, Greater Ontario California	Memphis Tourism
Great Rivers & Routes Tourism Bureau	Michigan's Great Lakes Bay Region
Greater Birmingham Conventions & Visitors Bureau	Minnesota State Fair/Board Member Visit Roseville
Greater Lansing Conventions & Visitors Bureau	Mobile Convention & Visitors Corp d/b/a Visit Mobile
Greater Raleigh Convention and Visitors Bureau	Monterey County Convention and Visitors Bureau
Greater Springfield Conventions & Visitors Bureau	Mt. Hood and Columbia River Gorge Regional Tourism Alliance
Greenbrier County Conventions & Visitors Bureau	Mt. Hood Territory - Clackamas County
Greene County Tourist Promotion Agency	Myrtle Beach Area Chamber & Convention & Visitors Bureau
Gulf Shores & Orange Beach Tourism	Nashville Convention & Visitors Corp
Hamilton County Tourism, Inc.	NCVC
Hancock County Tourism & Visitor Center	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  
 SolIN 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  
 Visit Albuquerque  
 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  
 Visit Dallas  
 Visit Detroit  
 Visit Dublin GA  
 Visit Dublin Ohio  
 Visit Eau Claire  
 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  
Visit LEX  
Visit Mesa  
VISIT Milwaukee  
Visit Mobile  
Visit Muskegon  
Visit Napa Valley  
Visit Natchez  
Visit Newport Beach  
Visit North Carolina  
Visit Oceanside  
Visit Omaha  
Visit Orlando  
Visit Overland Park  
Visit Palm Springs / Visit Greater Palm Springs  
Visit Panama City Beach  
Visit Park City  
Visit Phoenix  
Visit Plano  
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  
Visit Vacaville  
Visit Watertown  
Visit Wichita  
Visit Yuma  
VisitGreenvilleSC  
VisitLEX  
VisitLexington  
VisitNorfolk  
VisitPITTSBURGH  
VisitSI  
Walton County Tourism Department  
Western National Parks Association  
Wilmington and Beaches Convention & Visitors  
Bureau  
Yakima Valley Tourism

## Uruguay

Montevideo Convention Bureau

## Venezuela

Venezuela Tourism Board, INATUR





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