A Strategic Road Map for the NEXT Generation of Destination Organizations
Executive Summary

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

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

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

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

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

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

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

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

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

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

1. Artificial intelligence will become increasingly prevalent at an accelerated pace
2. Customers are increasingly seeking a unique, authentic travel experience
3. Communities expect to be more engaged in destination, product and experience development for locals and visitors
4. Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts
5. Greater industry, community and government alignment is driving destination competitiveness and brand

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

1. Protect revenue sources to maintain current funding levels
2. Focus on developing authentic experiences for the customer
3. Better integrate tourism and economic development
4. Build the destination brand around the community’s goals, values and creative energy
5. Have a greater role in destination and product development

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

- The #2 trend this year is, “Customers are increasingly seeking a unique, authentic travel experience.” It was the #2 trend in 2021.
- The #2 strategy is, “Focus on developing authentic experiences for the customer.” It ranked #5 in 2021 and #7 in 2019.
- “Communities expect to be more engaged in destination, product and experience development for locals and visitors” rose 27 points to the #3 trend this year.
- “Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts” is the #4 trend this year. It was #32 in 2021.
- “Have a greater role in destination and product development” is the #5 strategy, jumping 15 places since the last Futures Study.
- “Resident sentiment is becoming a key measurement” increased 32 places to the #6 trend this year.
- “There’s a greater focus on placemaking to benefit both locals and visitors” is the #8 trend in 2023, rising 20 points in the rankings.
- “Develop a destination master/management plan to define long-term strategy” is the #8 strategy.

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

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

Roles

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

1. Destination marketing
2. Data research & intelligence
3. Brand management
4. Destination & product development
5. Community relations & partnership

KPIs

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

1. Economic impact of tourism
2. Visitor satisfaction
3. Overnight visitation
4. Marketing ROI
5. Number of visitors/delegates
DestinationNEXT Mandate Map

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

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

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

**DEMAND**

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

**Visitor Engagement**

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

**Partner Support**

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

**Community Alignment**

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

**Destination Development**

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

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.

“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.”

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.”

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.
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.
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.

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

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

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

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

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

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

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

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

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.

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.
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.
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.

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

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

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

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

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

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

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

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

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

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

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

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

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

- Leisure Travel Only (group tour and independent) 13%
- Business Events Only (meetings, incentives, conventions, exhibitions) 23%
- Both Market Segments 64%

**Facilities**

**Do you operate a facility?**
- No 73%
- Yes 27%

**If yes, what kind?**
- Visitor Information Center 60%
- Convention or Conference Center 22%
- Other 8%
- Museum 3%
- Theater 5%
- Stadium 2%
Business Model

- Chamber of Commerce: 4%
- Government Department/Authority: 21%
- Non-profit Organization, with membership: 35%
- Non-profit Organization, with no membership: 17%
- Private/Public Partnership: 10%
- Other: 13%

Governance Model

- Member-elected Board of Directors: 48%
- Volunteer Leadership Committee: 5%
- Government Department/Ministry: 8%
- Other: 16%
- Government Appointed Board of Directors: 23%
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.
<p>| 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 (&quot;bleisure/blended travel&quot;) 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 |</p>
<table>
<thead>
<tr>
<th>Rank</th>
<th>Change</th>
<th>Trend Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>26</td>
<td>0</td>
<td>Organizations are increasingly prioritizing government advocacy to address macro challenges</td>
</tr>
<tr>
<td>27</td>
<td>-22</td>
<td>Travelers are demanding more personalized information, control and interaction</td>
</tr>
<tr>
<td>28</td>
<td>NEW</td>
<td>Our industry is seeing a significant generational shift in the workplace</td>
</tr>
<tr>
<td>29</td>
<td>NEW</td>
<td>Destinations are increasingly prioritizing long-term/long-tail/legacy impacts of business events</td>
</tr>
<tr>
<td>30</td>
<td>NEW</td>
<td>Climate change will increasingly impact how governments and the private sector operate</td>
</tr>
<tr>
<td>31</td>
<td>NEW</td>
<td>The present inflationary environment is impacting many aspects of travel</td>
</tr>
<tr>
<td>32</td>
<td>+38</td>
<td>Increasing social challenges and political disruptions are damaging destination brands and increasing industry and customer fears</td>
</tr>
<tr>
<td>33</td>
<td>-4</td>
<td>Disruptions due to terrorism, pandemics, disasters, etc., will increasingly impact how DMO/CVBs function</td>
</tr>
<tr>
<td>34</td>
<td>NEW</td>
<td>The increasing housing crisis in many destinations is severely impacting workforce development needs</td>
</tr>
<tr>
<td>35</td>
<td>+34</td>
<td>Loss of 3rd party cookies are requiring new marketing strategies and tactics</td>
</tr>
<tr>
<td>36</td>
<td>NEW</td>
<td>Increasing homelessness is damaging the visitor experience, destination brand and business development in more communities</td>
</tr>
<tr>
<td>37</td>
<td>NEW</td>
<td>Competition among destinations is increasing incentives and subvention funds for business events, cultural events and sports tourism</td>
</tr>
<tr>
<td>38</td>
<td>NEW</td>
<td>Violent crime risks are negatively influencing destination decisions</td>
</tr>
<tr>
<td>39</td>
<td>-29</td>
<td>Travelers want assurances of high standards of cleanliness and hygiene</td>
</tr>
<tr>
<td>40</td>
<td>-20</td>
<td>Risk management/mitigation is now a top priority</td>
</tr>
<tr>
<td>41</td>
<td>+58</td>
<td>More communities are increasingly attempting to attract digital nomads</td>
</tr>
<tr>
<td>42</td>
<td>NEW</td>
<td>The rise of the “anytime, anywhere traveler” means every weekend is a long weekend for travelers who work from home</td>
</tr>
<tr>
<td>43</td>
<td>-3</td>
<td>Industry-generated taxes are increasingly vulnerable to being diverted</td>
</tr>
<tr>
<td>44</td>
<td>+35</td>
<td>Governments are rethinking global supply chains to improve resilience</td>
</tr>
<tr>
<td>45</td>
<td>+37</td>
<td>Short-term rentals are having a growing impact on declining long-term workforce housing</td>
</tr>
<tr>
<td>46</td>
<td>-31</td>
<td>Business event customers are looking for better collaboration with destinations to achieve greater business outcomes</td>
</tr>
<tr>
<td>47</td>
<td>-4</td>
<td>There is significantly less corporate travel due to mainstream adoption of video-based conferencing</td>
</tr>
<tr>
<td>48</td>
<td>+41</td>
<td>The shift to remote, work-from-home workforce is accelerating</td>
</tr>
<tr>
<td>49</td>
<td>NEW</td>
<td>Downtown businesses are adapting to increasing vacancies in corporate offices</td>
</tr>
<tr>
<td>50</td>
<td>+3</td>
<td>There is increasing confusion due to widespread disparities regarding border and trade restrictions</td>
</tr>
</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Rank</th>
<th>Change</th>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>-8</td>
<td>Actively encourage policy makers to reduce barriers to travel</td>
</tr>
<tr>
<td>31</td>
<td>NEW</td>
<td>Develop a bleisure/blended travel (combined business &amp; leisure travel) initiative with partners</td>
</tr>
<tr>
<td>32</td>
<td>+22</td>
<td>Lead and support initiatives to address industry workforce shortages</td>
</tr>
<tr>
<td>33</td>
<td>+11</td>
<td>Develop strategies and policies to improve equity, diversity &amp; inclusion in our vendor network</td>
</tr>
<tr>
<td>34</td>
<td>-5</td>
<td>Pay close attention to safety, health, and security as a strategic consideration</td>
</tr>
<tr>
<td>35</td>
<td>NEW</td>
<td>Support development for businesses operated by members of underserved communities (e.g., Black, Brown, Indigenous, etc.)</td>
</tr>
<tr>
<td>36</td>
<td>+27</td>
<td>Increase collaboration with local community organizations to address social issues</td>
</tr>
<tr>
<td>37</td>
<td>+28</td>
<td>Increase use of incentives to attract events</td>
</tr>
<tr>
<td>38</td>
<td>+31</td>
<td>Work more closely with airlines to build and promote air routes</td>
</tr>
<tr>
<td>39</td>
<td>NEW</td>
<td>Expand efforts to help develop and promote local neighborhoods</td>
</tr>
<tr>
<td>40</td>
<td>+14</td>
<td>Develop a more comprehensive crisis management strategy</td>
</tr>
<tr>
<td>41</td>
<td>+28</td>
<td>Increase client support for event legacy goals that positively impact local communities and support human rights management</td>
</tr>
<tr>
<td>42</td>
<td>NEW</td>
<td>Support improvement of regulatory compliance and occupancy tax strategy for short term rentals</td>
</tr>
<tr>
<td>43</td>
<td>NEW</td>
<td>Use Generative AI technology like ChatGPT for marketing, sales and other purposes</td>
</tr>
<tr>
<td>44</td>
<td>NEW</td>
<td>Increase engagement with government, community, and industry stakeholders to address housing affordability and availability</td>
</tr>
<tr>
<td>45</td>
<td>+33</td>
<td>Attract more remote workers to visit the destination for extended stays</td>
</tr>
<tr>
<td>46</td>
<td>NEW</td>
<td>Develop a resident advisory committee/council to promote greater community and resident engagement</td>
</tr>
<tr>
<td>47</td>
<td>+30</td>
<td>Increase involvement in risk assessment/mitigation strategies for business events</td>
</tr>
<tr>
<td>48</td>
<td>NEW</td>
<td>Increase engagement with government, community, and industry stakeholders to address homeless/mental health issues</td>
</tr>
<tr>
<td>49</td>
<td>+24</td>
<td>Increase advocacy efforts regarding border trade and travel restrictions</td>
</tr>
<tr>
<td>50</td>
<td>+30</td>
<td>Consider mergers with other organizations (e.g., economic development, government departments, chambers of commerce, etc.)</td>
</tr>
</tbody>
</table>
### 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

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

#### KPIs

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

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

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

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

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

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.”
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
4. Content creation and dissemination by the public and stakeholders across all platforms drives the destination brand and experience
5. Travelers are seeking more personal enrichment and wellbeing
6. Short-form video becomes the new currency of destination marketing and storytelling
7. Visitors are increasingly seeking experiences that embrace equity, diversity and inclusion and support underserved communities
8. Combined business and leisure travel (“bleisure/blended travel”) is becoming more popular
9. There is greater demand for more dynamic outdoor experiences
10. Demand across the global visitor economy continues to be strong
11. More destinations are focusing on attracting “high value” visitors to increase economic impact
12. 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
2. Increase capabilities in data management for business intelligence, marketing and community engagement
3. Focus significant attention on content creation and dissemination
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
6. Labor and skill shortages are increasingly being felt in sectors of the tourism industry
7. New data management platforms provide a 360-degree view of visitors and destination to help optimize strategy
8. Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources
9. There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain
10. 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
8. Develop a data-driven plan for a more sustainable visitor economy
9. Increase our organization’s knowledge of innovative technologies
10. Increase efforts to attract and retain our organization’s talent
11. Develop and support new events in the destination
12. Develop new KPIs to better measure the economic and social impact of the visitor economy beyond visitor volume
13. Increase industry promotion to promote tourism as a career path and support workforce development
14. Increase support for local small businesses and community groups
15. Leverage our region’s priority economic sectors to generate business events
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
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
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
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

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
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
8. Focus significant attention on content creation and dissemination
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16. Develop new KPIs to better measure the economic and social impact of the visitor economy beyond visitor volume
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
19. Protect and help steward the future of our natural environment
20. Improve accessibility for people of all abilities throughout the destination
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
24. Increase support for local small businesses and community groups
25. Leverage our region’s priority economic sectors to generate business events
26. Improve Board development and governance

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25 13 14 15 10
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Strategies by Region

27. Expand mandate to broaden our impact and relevance in the community
28. Expand support for local arts and cultural organizations
29. Increase efforts to develop the region’s sports tourism market
30. Actively encourage policy makers to reduce barriers to travel
31. Develop a bleisure/blended travel (combined business & leisure travel) initiative with partners
32. Lead and support initiatives to address industry workforce shortages
33. Develop strategies and policies to improve equity, diversity & inclusion in our vendor network
34. Pay close attention to safety, health, and security as a strategic consideration
35. Support development for businesses operated by members of underserved communities (e.g., Black, Brown, Indigenous, etc.)
36. Increase collaboration with local community organizations to address social issues
37. Increase use of incentives to attract events
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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

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

John Matson  
Location Engine

Steven Paganelli  
Tripadvisor

Rich Reasons  
Simpleview

Vail Ross  
STR Report

Janette Rousch  
New York City Tourism + Conventions

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization/Title</th>
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<tbody>
<tr>
<td>Guy Bigwood</td>
<td>Global Destination Sustainability Index</td>
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<tr>
<td>Jonathon Day</td>
<td>Global Sustainable Tourism Council (GSTC)</td>
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<tr>
<td>Teresa Ryder</td>
<td>Indigenous Tourism Association of Canada</td>
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<td>Jake Steinman</td>
<td>TravelAbility Summit</td>
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<td>Marcus Carney</td>
<td>Visit Yuma</td>
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<td>Cathy Ritter</td>
<td>Better Destinations</td>
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<td>Angela Nagy</td>
<td>Green Step Canada</td>
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<td>Martin Robertson</td>
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<td>John Tibbits</td>
<td>Colleges Ontario</td>
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<tr>
<td>Lakshmee Lachhman-Persad</td>
<td>Accessible Travel NYC</td>
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<tr>
<td>Karyl Leigh Barnes</td>
<td>Development Counsellors International (DCI)</td>
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<tr>
<td>Greg Takehara</td>
<td>Tourism Cares</td>
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<td>Sophia Hyder-Hock</td>
<td>Destinations International</td>
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### Client Panel

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<td>Eric Abramson</td>
<td>GL Events Venues</td>
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<tr>
<td>Lisa Astorga</td>
<td>International Society on Thrombosis &amp; Haemostasis</td>
</tr>
<tr>
<td>Alessandro Corteze</td>
<td>European Society for Radiotherapy and Oncology (ESTRO)</td>
</tr>
<tr>
<td>Nina Freyson-Pretorius</td>
<td>The Conference Company</td>
</tr>
<tr>
<td>Ben Hainsworth</td>
<td>The European Association for the Study of the Liver (EASL)</td>
</tr>
<tr>
<td>Mike Blackman</td>
<td>MCI Group</td>
</tr>
<tr>
<td>Robin Lokerman</td>
<td>Australian Psychology Association / AIEM Ambassador</td>
</tr>
<tr>
<td>Paula Rowntree</td>
<td>The Conference Company</td>
</tr>
<tr>
<td>Jan Tonkin</td>
<td>The Conference Company</td>
</tr>
<tr>
<td>Leslie Zeck</td>
<td>International Association of Dental Research</td>
</tr>
</tbody>
</table>
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

**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

**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

**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
Higashikoshu Regional Organization
Hiraizumi-Ichinoseki Destination Management Organization
Hitoyoshi- Kuma Tourism Regional Development Council
Japan Travel and Tourism Association
Kamaishi Destination Management Company
Kazuno Destination Management Organization
Kitaakita Tourism & Local Products Association
Kirinnomachi Tourist Bureau
Koriyama City Tourist Association
Kushiro Tourism & Convention Association
NachiKatsuura Tourism Organization
Niigata Prefectural Tourist Association
Niseko Promotion Board
Oki Islands Geopark Management Bureau
Osaka Convention & Tourism Bureau
Osaka International Business Promotion Center
Osumi Destination Marketing Organization
Sado Tourism Association
Saitama Prefecture Products & Tourism Association
Sakai Machizukuri Authority Co., Ltd.
San’in Tourism Organization
Sapporo Convention Bureau
Shimanami Japan
The Tourism Bureau of Nasushiobara City
Tohoku Tourism Promotion Organization
Tokyo Convention & Visitors Bureau
Towada Travel
Toyohashi Visitors & Convention Association
Toyonokuni Millennium Heritage Tourism Zone
Visit Hachinohe
Wakayama City Tourist Association
Yawatahama Hometown Tourism Corporation

Mexico
Mexican Association of Destination Management Companies, AMDEMAC
Mexican Association of Professionals in Trade Shows, Exhibitions, Congresses, & Conventions, AMPROFEC
Southern Tamaulipas Hotel Association
Aguascalientes Congress and Visitors Bureau
Survey Participants

Ciudad Juarez Chamber of Commerce
Tourism Cluster of Nuevo León
Tourism Council of Puebla
Zacatlan Tourism and Economic Development Organization
La Paz Tourism
Mexico City Tourism Board
Kenes Group
Mexican Caribbean Tourism Board
Durango Convention & Visitors Bureau
Hermosillo Convention & Visitors Bureau
Monterrey Convention & Visitors Bureau
Saltillo Convention & Visitors Bureau
Cuilacan 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

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

Portugal
Porto and North of Portugal Tourism Board

Qatar
Qatar Tourism

Rwanda
Rwanda Convention Bureau

Saudi Arabia
Royal Commission for AlUla

Singapore
Singapore Tourism Board

Slovenia
Ljubljana Tourism

South Africa
Cape Town Tourism
South Africa National Convention Bureau

South Korea
Goyang Conventions & Visitors Bureau

Spain
Turisme De Barcelona

Sweden
Malmö Convention Bureau
Uppsala Convention Bureau
Visit Stockholm

Switzerland
MCI Group
Switzerland Convention & Incentive Bureau (SCIB)

Thailand
Thailand Convention & Exhibition Bureau (TCEB)

Turkey
Turkey Tourism Promotion and Development Agency

Ukraine
Lviv Tourism Office

United Arab Emirates
Abu Dhabi Convention & Exhibition Bureau
Survey Participants

**United Kingdom**
Destination Vancouver
Liverpool Convention Bureau
London & Partners
Marketing Manchester
Visit West
VisitBritain/VisitEngland
VisitScotland

**United States**
7 Cedars
AirDNA
Allen Convention and Visitors Bureau
Alpharetta Convention & Visitors Bureau
Amelia Island Convention & Visitors Bureau
Anderson Madison County Visitors Bureau
Arkansas Tourism
Arlington Convention & Visitors Bureau
Asociación de Profesionales del Turismo Latino&Américano (ASOPROTURLA))
Aspen Chamber Resort Association
Beverly Hills Conference & Visitors Bureau
Birch Run Convention & Visitors Bureau
Black Hills & Badlands Tourism Association
Boulder Convention and Visitors Bureau
Discover Puerto Rico
Brand USA
Branson Lake Chamber of Commerce / Convention & Visitor Bureau
Cabarrus County Convention and Visitors Bureau
Calhoun County Visitors Bureau
Catch Des Moines
Charlotte Regional Visitors Authority
City of Port Angeles
City of Roseville
City of Sequim
City of Temple
Columbia Convention and Visitors Bureau
Coos Bay–North Bend–Charleston Visitor & Convention Bureau
Corsicana Visitors Bureau
Darien–McIntosh County Chamber of Commerce
Dayton Convention & Visitors Bureau
Daytona Beach Area Convention & Visitors Bureau
Destination Ann Arbor
Destination Augusta
Destination Bryan
Destination Cleveland
Destination DC
Destination Gettysburg
Destination Lancaster
Destination Madison
Destination Mansfield–Richland County
Destination Marketing Corp.
Destination Missoula
Destination Niagara USA
Destination North Myrtle Beach
Destination Rogers
Destinations International
Destin–Fort Walton Beach
Discover Albany
Discover Denton Texas
Discover Durham
Discover Green Bay
Discover Kalamazoo
Discover Lehigh Valley
Discover Monroe–West Monroe
Discover Puerto Rico
Discover The Palm Beaches
DistiNCTly Fayetteville
Division of Tourism, Film and Arts
Survey Participants

United States
Dominican Republic Tourism Board
Elgin Area Convention & Visitors Bureau
Experience Champaign-Urbana
Experience Grand Rapids
Experience Kissimmee
Experience Olympia & Beyond
Experience Scottsdale
Explore Brookhaven
Explore Butts County/Butts County Chamber of Commerce
Explore Fairbanks
Explore Whitefish
Extreme Tours
Fairbanks Convention and Visitors Bureau dba Explore Fairbanks
Fargo-Moorhead Conventions & Visitors Bureau
Finger Lakes Visitors Connection
Fort Myers-Islands, Beaches & Neighborhoods
Fox Cities Convention & Visitors Bureau
Fredericksburg Convention and Visitor Bureau
Georgia Association of Convention & Visitors Bureaus, Inc. (GACVB)
Glacier Country Tourism
Global Meetings and Tourism Specialists
GO-CAL, Greater Ontario California
Great Rivers & Routes Tourism Bureau
Greater Birmingham Conventions & Visitors Bureau
Greater Lansing Conventions & Visitors Bureau
Greater Raleigh Convention and Visitors Bureau
Greater Springfield Conventions & Visitors Bureau
Greenbrier County Conventions & Visitors Bureau
Greene County Tourist Promotion Agency
Gulf Shores & Orange Beach Tourism
Hamilton County Tourism, Inc.
Hancock County Tourism & Visitor Center
Hawaii Tourism Authority
Hawaiʻi Visitors & Convention Bureau
Hello Burlington
Hocking Hills Tourism Association
Irving Convention & Visitors Bureau
Jackson County Tourism Development Authority
JB Imports
Johnston County Visitors Bureau
Kingbird Innovation Center
Lafayette Convention & Visitors Commission
Shipshewana LaGrange County Visitors Bureau
Leavenworth Convention and Visitors Bureau
Los Angeles Tourism & Convention Board
Los Angeles Tourism Board
Louisville Tourism
Low Point LLC.
Maine Office of Tourism
Myrtle Beach Area Chamber of Commerce/Convention & Visitors Bureau
Monterey County Convention & Visitors Bureau
Meet Minneapolis
meetNKY
Memphis Tourism
Michigan’s Great Lakes Bay Region
Minnesota State Fair/Board Member Visit Roseville
Mobile Convention & Visitors Corp d/b/a Visit Mobile
Monterey County Convention and Visitors Bureau
Mt. Hood and Columbia River Gorge Regional Tourism Alliance
Mt. Hood Territory - Clackamas County
Myrtle Beach Area Chamber & Convention & Visitors Bureau
Nashville Convention & Visitors Corp
NCVC
New Smyrna Beach Area Visitors Bureau
North Little Rock Convention & Visitors Bureau
Northstar Meetings Group
Survey Participants

Ocala/Marion County Visitor and Convention Bureau
Ohio Travel Association
Olympic Peninsula Visitor Bureau
Orange County Tourism & Film
Pocono Mountains Visitors Bureau
Providence Warwick Convention & Visitors Bureau
Pulaski County Tourism Bureau
Punta Gorda/Englewood Beach Visitor & Convention Bureau
Regenerative Resource Partners
Reno Tahoe
Richmond Region Tourism
ROOST
San Juan Islands Visitors Bureau
Sequim Lavender Experience
SoIN Tourism
Springfield MO Convention and Visitors Bureau
Steamboat Springs Chamber
Taste Newberg
The Happy Valley Adventure Bureau
The Resort at Port Ludlow
Tour Stafford
Tourism Economics
Travel Butler County Ohio
Travel Costa Mesa
Travel Juneau
Travel Lane County
Travel Michigan
Travel Portland
Travel Santa Ana
Trumbull County Tourism
Valley Forge Tourism
Vidalia CVB
Virgin Media
Visit Albuquerque
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