DESTINATIONS INTERNATIONAL

DESTINATION ORGANIZATIONS AND ECONOMIC DOWNTURNS

Historical Lessons for the Year Ahead

A DESTINATIONS INTERNATIONAL INDUSTRY BRIEF

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EXECUTIVE SUMMARY

U.S. and Canadian destination organizations are in the midst of a period of uncertainty and potentially compounding stress. The next 12 months are not a single crisis but a stacked-risk environment: federal policy uncertainty, reduced or volatile international visitation, domestic consumer-confidence pressure, political polarization, local and state or provincial budget scrutiny, labor constraints and climate disruptions.

Current U.S. forecasts point to domestic-led growth but only modest inflation-adjusted spending gains in 2026. While the U.S. Department of Commerce National Travel and Tourism Office (NTTO) currently forecasts international visitor growth from 2026 through 2030, lower-than-expected early-2026 arrival data and industry commentary point to near-term softness and policy sensitivity.

In contrast, Canada's outlook appears comparatively stronger and less vulnerable, but not immune, to economic and geopolitical volatility. Canada benefits from a favorable international brand position, a comparatively weak Canadian dollar, 2026 FIFA World Cup matches in Toronto and Vancouver and domestic substitution away from some outbound travel; however, provincial deficits, healthcare-driven spending pressure, climate disruptions, U.S.-Canada political tension and gateway-market dependence mean Canadian organizations also need fiscal-defense and readiness triggers.

Most destination organizations are not strangers to economic, fiscal and geopolitical headwinds, which have posed significant challenges to the sector over the past 15 years, including the 2008-11 "Great Recession" and 2020-23 COVID-19 pandemic. Indeed, a look at how destination organizations weathered past periods of uncertainty and challenge can provide some key insights on how to navigate choppy waters.

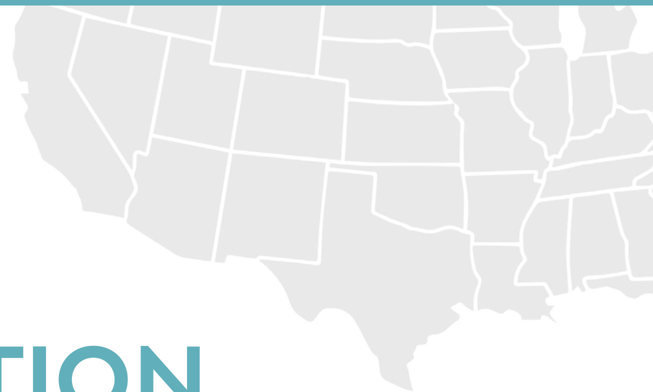
This assessment examines historically comparable periods of stress and the positive and negative steps destination organizations and governments have taken. Periods reviewed include the 1990–91 recession (including Colorado's landmark 1993 defunding), the post-9/11 downturn, the 2008-11 recession and the COVID-19 pandemic.

Across these periods, a consistent pattern emerges. Destination organizations that maintained or quickly restored marketing investment, diversified their funding base and produced rigorous economic-impact evidence for lawmakers and key stakeholders generally preserved market share and recovered faster. Those organizations that accepted full or near-total defunding, relied on a single volatile revenue source or failed to document their value before a crisis hit generally lost market share for years and required a decade or more to recover, if they recovered at all.

The most consequential pattern, addressed in the case-study section below, concerns fiscal tightening specifically at the state, provincial and local level. Colorado's complete elimination of tourism marketing in 1993 stands as the clearest cautionary tale, while the state's 2020 reversal of a proposed 87 percent cut, achieved by citing its own 1990s history, stands as the clearest example of evidence-based advocacy succeeding under acute fiscal pressure.

On the Canadian side, the steady decline of the Canadian Tourism Commission's federal budget from $105.9 million in 2009 to $58 million in 2014, and Destination Canada's current trajectory from $127 million in 2025 toward a planned $94 million base by 2027, illustrate a slower-moving but comparably consequential pattern of attrition through incremental cuts rather than a single dramatic elimination event.


Vancouver, BC, Canada



UNITED STATES

CURRENT SITUATION AND OUTLOOK

Domestic-led demand and exposure to international and domestic policy risks will continue to drive U.S. travel outlook. The U.S. Travel Association's May 2026 forecast projects inflation-adjusted U.S. travel spending growth of 1% in 2026, accelerating in later years, with domestic travel helping offset inflation and geopolitical uncertainty. U.S. Travel's broader economic-impact data continues to show that travel remains a major economic sector, with $1.3 trillion in direct traveler spending in 2024 supporting more than 15 million jobs.

- **International Inbound Demand Remains Fragile.** While NTTO's five-year forecast projects increased international arrivals from 2026 through 2030, International Inbound Travel Association data in January 2026 showed non-U.S. resident international arrivals down 3.5% from January 2025 and still below January 2019 levels. News coverage in 2026 also reflects significant concern over U.S. inbound softness, especially from Canada and other major source markets. The August 2026 breakdown in U.S.-Canada trade talks and Washington's subsequent imposition of new tariffs and Ottawa's imposition of retaliatory tariffs could threaten to undermine the potential nascent recovery since April 2026 in Canadian travelers to the United States, especially should bilateral tensions further escalate.

- **Labor to Remain a Constraint and a Signal.** The U.S. travel and tourism labor market has strengthened heading into summer 2026, but tight staffing, wage pressure, labor-relations, foreign labor availability and service quality remain constraints as employers compete for workers during high-demand periods. Canadian tourism workforce research notes the pandemic's ongoing impact on tourism and hospitality labor systems and highlights collective-impact approaches involving tourism, workforce, and industry partners.

U.S. states will continue to wrestle with a combination of federal policy uncertainty, public-sector budget pressure, reduced international visitation, consumer-confidence weakness, political polarization, labor constraints and climate events, although some states will be in stronger fiscal positions due to meaningful taxpayer surpluses and reserves.

- The 2025 Financial State of the States report by the University of Denver Truth in Accounting (TIA) program found that 25 states were unable to cover all debts by the end of FY2024, totaling $765 billion, mostly retirement liabilities.

- The same report warned that, while federal aid remained above pre-pandemic norms, states could face a funding shortfall exceeding $300 billion—nearly 10 percent of projected expenses—should federal funding levels, adjusted for inflation, return to 2019 levels.

- COVID-related federal funding, strong tax collection receipts, and market gains are unlikely to cushion states' fiscal positions amid current political-economic headwinds.

The following table ranks funding risk to U.S. destination organizations based on state fiscal strength; vulnerability of lodging tax revenue and other destination organization income streams to reallocation or changes in permitted use; and tourism-flow risks, including reliance on international visitors, meetings, gateway markets and climate-related shocks.

STATE	RISK TIER	RISK TO DESTINATION ORGANIZATION REVENUE
Connecticut **Illinois** **Massachusetts** **New Jersey**	**Very High** !	**CT:** High retiree obligations and state public-spending pressure combined with high destination organization dependence on state funding. **IL:** High state pension/debt burden issues and significant municipal lodging tax revenue control. **MA:** High fixed state obligations; municipal control of lodging tax revenue; no general statewide destination organization entitlement. **NJ:** High long-term fiscal obligations; State tourism allocation is protected, but limited destination organization entitlement from occupancy taxes.
Arizona **Hawaii** **Louisiana** **Nevada** **New York** **Oklahoma**	**High** !	**AZ:** Fiscally stronger than higher-risk tiered states but high destination organization dependance on local lodging tax contracts; new assessment authority may lower future exposure. **HI:** State/county control over destination marketing and management funding; climate/disaster risk, resident sentiment and tourism-dependence concerns. **LA:** Risk from fiscal weakness, high federal-aid exposure offset some by highly layered statutory and entitlements system and considerable local variation. **NV:** Despite smaller taxpayer burden, high lodging tax dependence and federal-aid exposure. **NY:** Risk from declining state surplus offset some by heterogeneous locality-specific occupancy-tax statutes. **OK:** Fiscally stronger than higher-tiered risk states but high federal-aid exposure concerns, municipal control over local hotel-tax structures.
California **Delaware** **Kentucky** **Iowa**	**Elevated** -	**CA:** Significant state fiscal, climate and international-visitor risks remain, but widespread Tourism Improvement District (TID) assessment funding insulates some localities. **DE:** State fiscal pressure remains, but statutory tax allocations help insulate destination organizations. **KY:** Statutorily structured room tax revenue reduce appropriation risk as state faces fiscal burden and federal aid exposure. **IA:** Despite strong state fiscal cushion, destination organization funding dependent on municipal discretion over lodging taxes.

STATE	RISK TIER	RISK TO DESTINATION ORGANIZATION REVENUE
Alaska **Arkansas** **Idaho** **Minnesota** **Nebraska** **Oregon** **South Carolina** **Tennessee** **Virginia**	**Moderate**	**AK, ID, TN, VA:** Despite sound state fiscal position, destination organization funding subject to local/municipal discretion over lodging tax revenue. **AR:** Destination organization funding likely shaped more by the decisions and priorities of Advertising and Promotion tax commissions than the state's fiscal position. **MN:** Fiscal conditions support proactive investment; TIDs to provide some funding protection. **NE, SC:** Strong fiscal condition but high federal-aid exposure means destination organizations should prepare alternative funding and advocacy scenarios. **OR:** Despite manageable state fiscal position, emerging funding risk from statutory changes, going into effect in 2027, broadening local access to some lodging tax revenue.
Montana **North Dakota** **Utah** **West Virginia** **Wyoming**	**Low**	**MT:** Strong current position reinforced by state-mandated durable tourism-related allocations. **ND:** Strong cushion combined with mostly tourism-oriented local lodging-tax structures. **UT:** Strong fiscal footing and reserve discipline, although moderate local discretion on tourism tax allocation and uses. **WV:** Strong fiscal position, despite moderate reliance on federal aid; occupancy tax statutes generally dedicate meaningful shares to destination organizations. **WY:** Large fiscal cushion and dedicated state tourism promotion support; some mineral and federal-policy volatility.

In fiscally weaker states, tourism-related appropriations, matching funds, grants, infrastructure support, destination stewardship projects, state tourism office budgets and local-government transfers may face greater scrutiny. For destination organizations, the relevant question is not only whether public finances are weak but whether destination organization revenue is appropriated, contract-dependent, locally discretionary or open to competing uses.

In those states with more sound fiscal positions, TIDs/TBIDs, dedicated/statutory funding allocations and other protected mechanisms, destination organizations may have more room to pursue countercyclical visitor-economy investment even when broader fiscal pressures persist.

CANADA

CURRENT SITUATION AND OUTLOOK

Canada's long-run outlook is comparably stronger. Destination Canada's 2026-2035 outlook positions Canada for growth and market-readiness planning. Business Development Bank of Canada's (BDC) 2026 outlook also emphasizes resilient domestic travel intentions, despite economic uncertainty shaped by slower national GDP growth, higher transportation costs, a soft Canadian dollar, domestic value-seeking and weaker labor-market confidence. Those conditions support domestic and near-international demand, but they will not affect provinces evenly: World Cup host markets (Toronto and Vancouver) may benefit from event-related visibility, while wildfire-exposed, gateway, Atlantic and resource-dependent provinces face different fiscal and demand risks.

For Canadian destination organizations, 2026 risk reflects both provincial fiscal pressure and the degree to which local destination organization funding is structurally insulated from that pressure. Deficits, public spending priorities, debt-service costs, trade uncertainty and commodity volatility create the fiscal motive, while accommodation-tax rules, designated-recipient structures and industry-controlled destination marketing fees determine how readily that pressure can reach destination organizations.

- The August 2026 breakdown in U.S.-Canada trade talks, including new Section 338 tariffs and Canada's retaliatory measures, adds a further layer of macroeconomic drag. At the same time, Canadian tourism has also picked up real offsets: Destination Canada estimates redirected Canadian spending could add $3.2 billion to Canadian tourism from 2025 through 2027; domestic trip volume has continued to rise as Canadians substitute away from U.S. travel; and the sector is accelerating diversification toward overseas markets.

Toronto, Ontario, Canada

PROVINCE	RISK TIER	KEY IMPLICATIONS FOR DESTINATION ORGANIZATIONS
Manitoba	**Very High** !	**MB:** High net debt-to-GDP, recurring deficits and meaningful debt-service pressure.
British Columbia **Newfoundland and Labrador**	**High** !	**BC:** Large projected fiscal deficit and wildfire, housing and gateway-market exposure; Municipal and Regional District Tax (MRDT) designated-recipient rules and voluntary destination marketing fees (DMFs) limit reallocation risk. **NL:** Despite high debt and debt-service burdens, destination organization funding insulated by dedicated provincial lodging tax structure.
New Brunswick **Nova Scotia** **Ontario** **Prince Edward Island** **Quebec**	**Elevated** -	**NB:** Fiscal deterioration and a rising debt path; some funding protection from sector-specific lodging tax spending restrictions. **NS:** Rising debt ratio and widening deficits, but standardized levy authority and fairly protected destination organization structures in major markets limit direct funding threat. **ON:** Large debt and gateway/event exposure remain significant, but statutory revenue sharing framework limit direct funding reachability. **PE:** Small fiscal base, large deficit and debt service burden offset some by province's explicit tourism allocation. **QC:** Continuing deficits and large visitor-market exposure remain, but province-wide lodging tax architecture provides comparatively strong tourism funding protection.
Alberta **Saskatchewan**	**Low** ✓	**AB:** Low debt partly offset by commodity volatility; 2026 DMF framework adds meaningful protection for industry-led destination funding. **SK:** Low debt and strong credit profile combined with DMFs keeping major-market destination funding largely outside municipal reach.

While Canadian provincial risk should not be read as a forecast that tourism funds will be cut, destination organizations should be prepared to show how visitor-economy investment protects local tax bases, small businesses, events, workforce stability and community assets rather than appearing to compete with core public services.

COMPARABLE HISTORICAL PERIODS

The current period combines several stressors that have historically arrived separately: an international demand shock comparable in scale to 2008 and federal-operations disruption risk (government shutdown), layered on top of ordinary state and local fiscal-cycle pressure.

The 1990–91 Recession and Colorado's 1993 Defunding

While the 1990–91 recession was comparatively mild for most state tourism budgets, the case of the defunding of Colorado's state tourism office is a warning of the long-term risks posed by short-term cost savings measures.

In 1993, Colorado voters rejected a proposed constitutional amendment to extend the state's tourism marketing tax, prompting the state to eliminate the Colorado Tourism Office's $12 million promotion budget, the only state in the country to take this step. The consequences were severe and long-lasting. Colorado's share of the U.S. domestic vacation market fell from 2.7 percent to 1.6 percent, a 40 percent decline within two years. In the state's flagship summer resort segment, top-ranked Colorado fell to seventeenth place nationwide.

While the state operated for seven years on the assumption that its natural assets would "sell themselves," that costly assumption resulted in total annual tourism revenue losses eventually exceeding $2 billion per year. In 2000, the legislature reinstated funding but only at a modest $5 million, a fraction of the original budget. Even after funding was restored, it took the state until 2007 to reach all-time visitation and spending levels.

Post-9/11 Downturn (2001–2003)

The September 11, 2001 attacks produced an immediate and severe demand shock: airline passenger loads and hotel occupancy fell by roughly half in the immediate aftermath, and the broader downturn, compounded by the 2001 recession and later the SARS outbreak, contributed to an approximately 12 percent decline in U.S. tourism receipts and the loss of roughly 390,000 tourism-related jobs between 2001 and 2003.

New York City offers the clearest example of a rapid, locally driven response: the city launched a major advertising campaign within months, encouraging visitors to "come see New York in its finest hour," paired with a broader narrative of resilience and rebuilding. Even so, the city's visitor numbers fell more than 14 percent in the first year, illustrating that even well-executed local marketing cannot fully offset a demand shock rooted in safety perception and macroeconomic conditions; it can, however, meaningfully shorten the recovery period and preserve the destination's brand equity for when demand returns.

At the federal level, the response was notably slower than the scale of the crisis warranted. It was not until February 2003, roughly seventeen months after the attacks, that Congress authorized federal grants in support of a coordinated international advertising campaign to encourage travel to the United States. This delay is frequently cited in tourism-policy literature as a lesson in the cost of waiting for federal coordination rather than acting at the state and local level immediately following a demand shock.

The Great Recession (2008–2011)

The Great Recession produced budget shortfalls in nearly every state; 48 states faced shortfalls in fiscal years 2009 and 2010, and 46 still faced shortfalls heading into fiscal year 2011. While the resulting cuts often fell hardest on education, health care and other large budget categories, tourism and destination marketing budgets were also frequently early and disproportionate targets, as lawmakers tended to view them as discretionary line items vice essential services.

- After **Connecticut** eliminated its state tourism office, travel revenue growth slowed to roughly half the pace achieved even during the depths of the 2009–2010 recession, an outcome Connecticut's governor admitted was a "gigantic mistake."

- **Pennsylvania** imposed deep cuts during this period, lost approximately $600 million in travel-generated state and local tax revenue and saw its regional overnight-trip market share sharply decline.

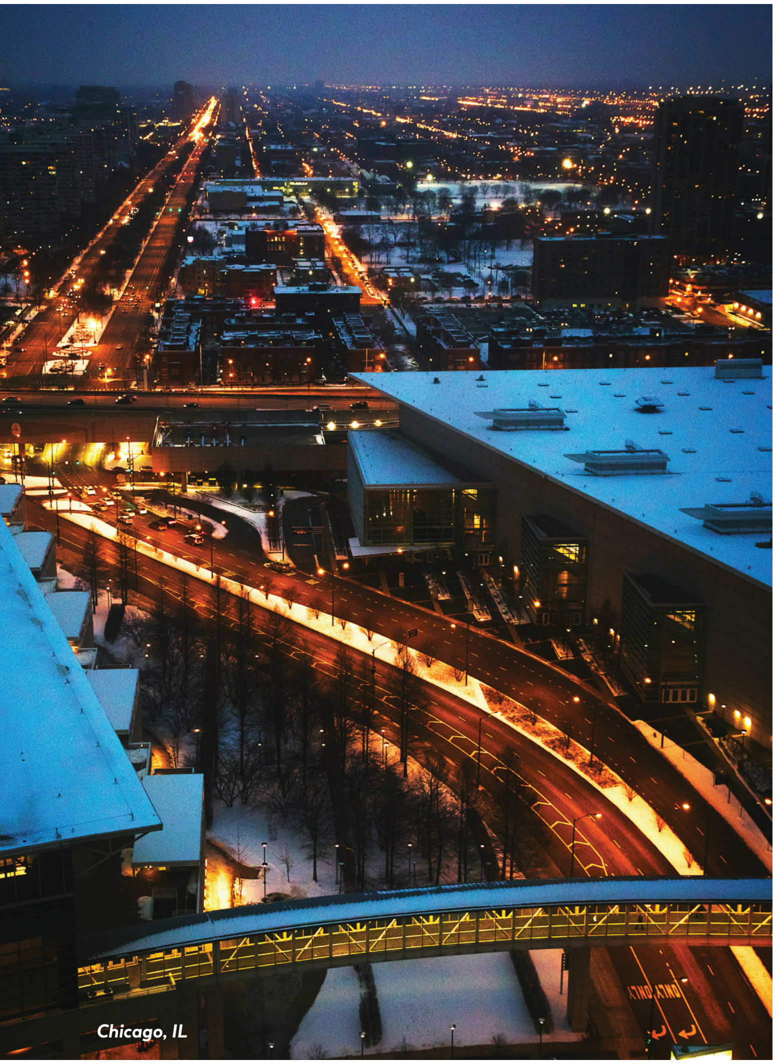
- **Washington** State's decision in 2011 to shutter its tourism office prompted neighboring states to seek to capture market share: Montana increased its tourism marketing budget by 30 percent the following year.


Pittsburgh, PA

On the U.S. federal level, the Travel Promotion Act of 2009, which created the Corporation for Travel Promotion—also known as Brand USA—established a more durable and diversified funding base for national-level international travel promotion, instead of depending on annual discretionary appropriation cycles. This structure, combining a capped federal match with mandatory private and state-level matching contributions, proved more resilient through the 2010s than fully appropriation-dependent models, though, as discussed in Section 4, it remains vulnerable to federal funding cap reductions, as the 2025 reconciliation act later demonstrated.

Canada's pursuit of a markedly different trajectory than the United States during the same period provides a useful contrast. Rather than a single dramatic cut, the federal government initially increased funding to the Canadian Tourism Commission (CTC), predecessor to today's Destination Canada, throughout the crisis.

- Tourism and destination-related funding in the 2009 budget included $40 million to support marketing tied to the 2010 Vancouver Winter Olympics, $100 million for marquee festivals and events and $150 million for Parks Canada visitor facilities. This counter-cyclical, event-anchored investment helped Canada maintain visibility through the recession.



Chicago, IL

- CTC funding entered a long, sustained decline during 2012-14; federal funding declined by 45 percent, while many provinces also cut funding. **Ottawa Tourism** utilized locally controlled municipal accommodation tax revenue to absorb a $3.4 million provincial funding cut, allowing it to maintain core sales, marketing and destination-development work despite the loss of provincial support.

The COVID-19 Pandemic (2020–2023)

For many destination organizations, the negative revenue shocks related to the pandemic were the largest and most immediate ever experienced. Hotel occupancy tax revenue, the primary funding source for most local and state organizations, fell by as much as 80 to 90 percent in major markets. Most destinations saw budgets shrink by as much as 60 percent within months of the pandemic's onset.

Local case studies illustrate both the scale of the shock and divergent organizational responses.

- **Team San Jose**, which manages the city's convention center and visitors bureau, saw operating revenue fall 86 percent in one year and effectively to zero the following year; it laid off approximately 1,400 employees, the largest single layoff event in the region during the pandemic.

- **Chicago's McCormick Place Complex** lost an estimated $233.8 million in combined city and state tax revenue and was forced into deep workforce furloughs and debt refinancing to remain solvent.

St. Louis, MO

- **Explore St. Louis** saw hotel tax collections fall well short of projections, threatening its core marketing function precisely when destinations most needed to rebuild demand.
- Many convention centers and destination organizations turned to debt restructuring rather than a fundamental rethinking of revenue models, preserving short-term solvency at the cost of extended long-term liabilities.

Colorado again provides the period's most instructive contrast. In May 2020, as gambling-tax revenue—the source of most of the state tourism office's budget—evaporated under pandemic closures, Colorado's legislature recommended an 87 percent cut to the state's $18.5 million Tourism Office budget. Industry leaders quickly mobilized and messaged legislators on the negative consequences of defunding the state's tourism office in 1993, resulting in legislators decreasing the scale of cuts to 47 percent, preserving the state's core marketing functions. Colorado's case is a clear demonstration of documented institutional history as a real-time advocacy tool during acute fiscal stress.

More broadly, the pandemic accelerated a shift in how destination organizations approached funding and mission. Industry surveys conducted in 2021 and 2022 found that destination organizations increasingly prioritized diversified funding streams beyond hotel taxes (including membership models, cooperative marketing, tourism improvement districts and broader economic-development partnerships) and expanded their mandate from pure visitor marketing toward broader "destination management," including resident sentiment and community benefit, in part to build a wider base of political support beyond the hospitality industry alone.

CROSS-PERIOD PATTERNS:

WHAT WORKED AND WHAT DID NOT

Historical precedent does not offer a single comparable analog for this exact combination, which counsels added caution in extrapolating any one period's lessons too literally onto current conditions.

Beneficial and Effective Approaches

Proportional funding reductions, even significant ones, have produced substantially better long-term outcomes than full elimination of marketing function. The distinction between a deep cut and a complete blackout has repeatedly proven to be the single most consequential decision point in each documented crisis.

Regional competitive market dynamics suggest that **organization budget decisions should account for the funding and marketing posture of neighboring and competing destinations, not solely a destination's own fiscal position.**

Producing and retaining rigorous, destination-specific economic-impact data before a crisis hit allowed destination organizations to respond quickly with concrete evidence when budgets came under threat, as Colorado's 2020 advocacy effort demonstrated.

Diversifying funding beyond a single hotel-tax or appropriation source—through membership dues, tourism improvement districts, cooperative marketing and broader economic-development partnerships—reduces exposure to any single shock, whether a pandemic, federal policy change or government shutdown. While widely adopted as a priority by destination organizations following the pandemic, full diversification has historically taken years to build and is not a short-term solution available within the coming budget cycle for most organizations.

Rapid, locally funded marketing responses immediately following a demand shock, rather than waiting for state or federal coordination, shortened recovery periods, as New York City's post-9/11 campaign illustrates, even though it could not fully offset the underlying shock.

Beneficial and Effective Approaches

Creating durable public-private institutional structures with mandatory matching contributions, as with the 2009 creation of Brand USA, provided more resilience than budgets dependent entirely on annual discretionary appropriations, though such structures remain vulnerable to caps being reduced by subsequent legislation.

Treating a demand disruption affecting a competing or substitute market as a reshoring opportunity, rather than purely a defensive problem, allowed several Canadian provincial destination organizations to convert the 2025 outbound-travel boycott into measurable domestic tourism-economy gains through rapid, targeted reinvestment.

Because group and convention travel has historically recovered more slowly than leisure travel after a demand shock, **destinations with convention-center or meetings-dependent revenue models may wish to evaluate their exposure separately from their general leisure-marketing budget exposure.**

Harmful or Counterproductive Approaches

Eliminating marketing budgets entirely, rather than reducing them proportionally, produced disproportionate and long-lasting market-share losses in every documented case, including Colorado in 1993, Connecticut around 2010, and Washington State in 2011.

Relying on the assumption that a destination's natural or cultural assets would "sell themselves" without active promotion was repeatedly disproven; in Colorado's case, the resulting travel patterns shifted toward lower-value visiting-friends-and-relatives traffic rather than maintaining higher-spending leisure visitation.

Over-reliance on a single volatile revenue source, particularly hotel/occupancy taxes or gambling-tax-funded appropriations, left destination organizations acutely exposed when that source collapsed suddenly, as seen in Team San Jose's near-total revenue loss and Colorado's COVID-era gambling-tax shortfall.

Slow or fragmented coordination between levels of government delayed recovery. The roughly 17-month gap before a coordinated federal post-9/11 marketing response is a frequently cited cautionary example.

Addressing revenue shortfalls primarily through debt refinancing, rather than through operating-model changes, preserved short-term solvency in cities such as Chicago and Milwaukee but extended long-term financial obligations without resolving underlying structural vulnerability.

Allowing national-level funding to erode gradually across many budget cycles, as occurred with the Canadian Tourism Commission and is currently recurring with Destination Canada, generated cumulative capacity reductions comparable to a single dramatic cut while drawing substantially less sustained industry counter-mobilization at any individual decision point.

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