

A Strategic Road Map for the NEXT Generation of Destination Organizations

DESTINATION
N→**EXT**



Executive Summary

The Road Back

The Covid-19 pandemic put a spike in the heart of the global visitor economy. No other sector cratered like ours, from years of exponential growth to a collective shutdown of business, as quickly as travel and tourism.

On the road to recovery, most destination organizations are re-evaluating their purpose and evolving their mandates. Many are faced with a crisis stack of challenges and less funding to capitalize on opportunities.

The DestinationNEXT 2021 Futures Study is a strategic road map that provides direction for how destination leaders should navigate our industry's highly fluid future. It will help prioritize decision making in the months and years ahead for any organization of any size and budget.

The takeaways in this global Study are based on a comprehensive survey that asked destination leaders a wide range of questions relating to 100 travel trends, 80 industry strategies, shifting organizational roles, and key performance indicators.

For 2021, a total of 706 participants in 52 countries contributed to the survey.

The data was further supplemented with more than 150 interviews with global leaders in tourism, hospitality, business events, transportation, technology, economic development, education, urban design, esports and other sectors.

All of that qualitative and quantitative research led to three transformational opportunities for destination organizations in 2021 and beyond. Together, they provide an integrated framework designed to accelerate the recovery of the global visitor economy, as well as lay the foundation for building a stronger, more resilient sector in the coming decades.

The three transformational opportunities are:

1. Destination Alignment

Aligning the public, private and civic sectors drives destination performance

2. Sustainable Development

Destination and product development should marry people, planet, profit and policy

3. Values Based Marketing

A community's values, goals and creative energy are the new competitive advantage

The global visitor industry is at a crossroads. When push comes to shove, will the industry really "build back better?" Will we see definitive advances in sustainability; equity, diversity and inclusion; and community building to make our sector more human and earn the respect of other leaders? Or, are a majority of stakeholders simply waiting out the pandemic for the old status quo to return?

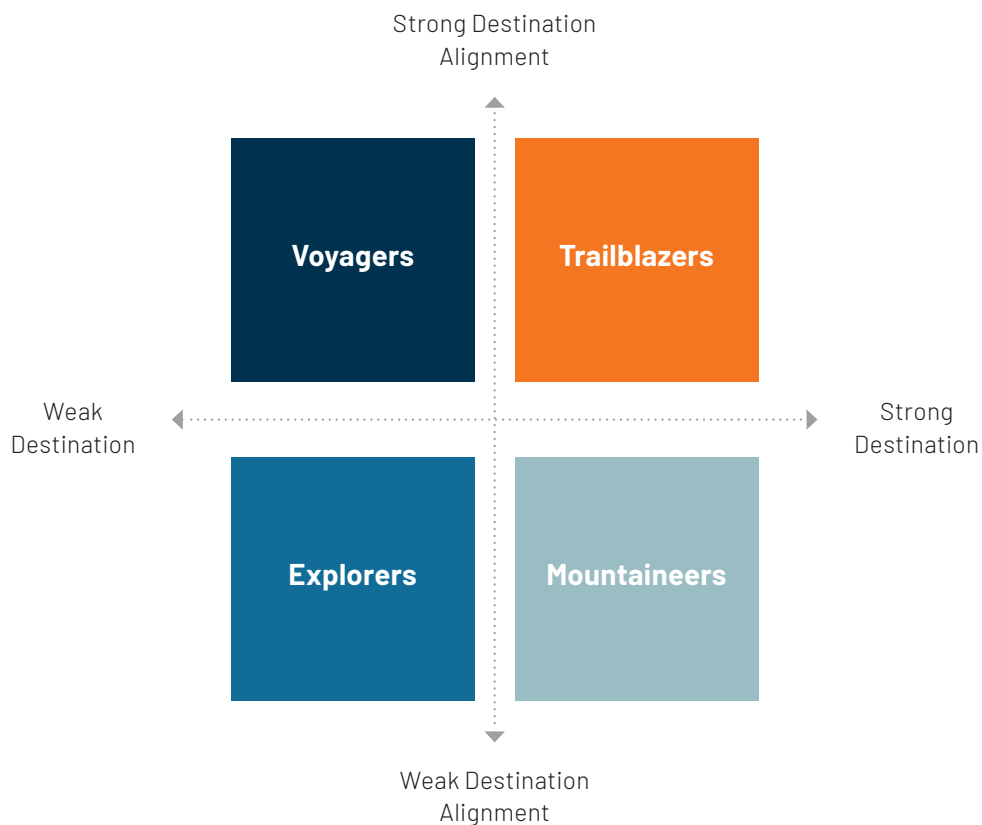
That is going to be the defining question for how destination organizations move forward as a Community Shared Value.

Scenario Model

This year includes some significant updates to the DestinationNEXT Scenario Model and Assessment Tool, which is based on a survey for public, private and civic stakeholders to identify opportunities and challenges in their local visitor economy. The survey data is used to plot the destination in one of four quadrants within the Scenario Model (below). Each of those scenarios have specific strategies that destination organizations should employ to address challenges and increase opportunities.

Since 2015, more than 260 destinations worldwide have completed the assessment. Previously, there were 10 weighted variables each for measuring Destination Strength and Community Alignment. In 2021, there is now an expanded 2.0 framework with 12 variables each for evaluating Destination Strength and a re-labeled Destination Alignment axis.

The updates will provide more comprehensive and customized outcomes for destination leaders. For more information, see page 42.





Hello,

Back in the first half of 2019, the year of the previous DestinationNEXT Futures Study, Destinations International, the world's largest resource for destination organizations and tourism boards, embarked on two parallel tracks looking deeply at the current condition and future of destination organizations. The Destinations International advocacy team looked at destination organizations from the outside — looking at them as a civic leader or resident would see them. Our partners, MMGY NextFactor, looked at destination organizations from the inside. They examined destination organizations themselves as well as industry trends and future strategies.

Both Destinations International and MMGY NextFactor came back with complementary recommendations including the concept of destination organizations operating like a public good and being a community shared value. We identified three transformational opportunities: destination stewardship, community alignment and digital conversion.

Since the last DestinationNEXT Futures Study in 2019, we have seen a global pandemic, an accompanying recession, civil unrest over issues long unresolved, and continuing political polarization. As we explored the effect of the COVID-19 pandemic, we realized something important. The virus is not creating a new future, it is speeding up the changes already underway. Now is a time of great acceleration.

We believe that destination leaders need to leverage all the information and opportunities collectively to effectively lead their organizations. We are proud to release this report to help our members by providing them with a roadmap toward a successful, more impactful future. To accompany this study, Destinations International will release the Community Shared Value Roadmap and Workbook — a values-based approach to community alignment that will help guide destination organizations.

We invite you to read through the report with your team and use the findings to guide your destination organization toward a successful future.

Don Welsh

President and CEO,
Destinations International

Jack Johnson

Chief Advocacy Officer, Destinations
International
Executive Director,
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Dear Reader,

It is our pleasure to present the DestinationNEXT 2021 Futures Study. After years of strong growth, our industry did not anticipate the considerable challenges during the past two years. A global pandemic, social turmoil and political tensions affected the visitor economy like no other. As positive recovery signs begin to appear, a key will be to rebuild stronger and better.

The 2021 Futures Study is a deep dive into the major opportunities for destination marketing and management leaders in these dramatically changing times. It is an ambitious global project intended to provide a roadmap for destination organizations heading into the future.

We surveyed more than 700 industry and community leaders in over 50 countries. This was the most extensive survey ever completed in our industry. The takeaways provide strategic direction for any size organization moving forward.

Supplementing the Futures Study, the DestinationNEXT Scenario Model and Assessment Tool helps stakeholders strategically evaluate and rebuild their destinations. MMGY NextFactor has now led more than 260 detailed assessments of destinations around the world. The model has been updated to include several key new issues: health & safety; equity, diversity & inclusion; emergency preparedness; and sustainability & resilience.

We would like to acknowledge the ongoing support of Destinations International, which has made DestinationNEXT possible. We also want to express our gratitude to our Global Advisory Group. Their advice and support have been invaluable.

A handwritten signature in dark ink that reads 'Paul Ouimet'.

Paul Ouimet

Partner, President,
MMGY NextFactor

Managing Director,
DestinationNEXT,
Destinations International

A handwritten signature in dark ink that reads 'Greg Oates'.

Greg Oates

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Introduction

Building Consensus

To produce the DestinationNEXT 2021 Futures Study, our project team spoke with more than 150 government, destination, business and community leaders around the world. That is in addition to 706 destination executives from 52 countries who participated in the DestinationNEXT survey. There has never been this volume of outreach to develop thought leadership for the global visitor industry.

And yet, through it all, there has been a widespread lack of consensus because of Covid-19. The future of our industry seems to be many different futures. At the time of publication in summer 2021, some destinations are fully open while many others are without any significant visitor volume.

However, three common themes have emerged during the development of the 2021 Futures Study that apply to most all destinations.

The first is a much greater awareness among governments and community leaders today of the impact that tourism and business events has in their destinations. It took the disappearance of the travel and tourism sector to make it visible. The linkages between a destination's visitor economy and its overall economic and community vitality are now much more clear for many elected officials.

As such, the pandemic has provided a window of opportunity for government, community and industry leaders to come together to build stronger destinations by leveraging the visitor economy more effectively.

"We never paid much attention to tourism because we figured Destination Vancouver had it under control," said Paul Mochrie, city manager for the City of Vancouver. "Covid-19 turned that completely on its head."

The second common theme on the road to recovery is the exponential growth of attention around environmental impacts and equity, diversity and inclusion. Prioritizing profit over the health of the planet and wellbeing of people is a legacy that the global visitor industry must address. The United Nations' 17 Sustainable Development Goals provide a uniform framework with strategies and metrics — relating to economic, sociocultural and environmental sustainability — that apply to all destinations. And yet, few destination organizations are working with the relevant experts to establish parameters for responsible growth.

Visit Valencia is working with public and private partners to measure the carbon impacts of tourism. The organization stated, "The only long-term guarantee for tourism is that it is economically, socially and environmentally sustainable."

In the U.S. capital, Destination DC launched The DEI District in 2021. The initiative identifies ways for visitors and residents to engage local businesses and organizations who are striving to make the city more equitable. Elliott Ferguson, president and CEO of Destination DC, said, "Our hope is to empower people by embracing the diversity in our city, learning about progress happening here, and understanding ways to create lasting change within our communities."



“Our hope is to empower people by embracing the diversity in our city.”

The third macro theme coming out of Covid-19 is a re-evaluation of our industry’s purpose, values, roles and performance indicators — as well as the evolving values and motivations among consumers. More destination organizations are embracing the idea that travel and tourism isn’t purely the end goal anymore. Rather, the visitor economy is a pipeline for supporting the greater priorities of communities, which also include those of the industry and its stakeholders.

Growing numbers of destination leaders, especially among younger generations, are focused on a more holistic industry approach to optimize the interactions between visitors, the industry that serves them, and the communities that host them.

“What I would like to learn from the Futures Study this year is how we make our industry more human, equitable and empathetic,” said Steen Jakobsen, vice president of Dubai Tourism. “We’re all going to see a trend where a lot of people are saying that

they’ve had enough of the status quo. So how do we as an organization translate that into our agenda? I think we have to start with the fact that we need to be human-first.”

Destination organizations are dealing with many other industry and societal disruptions, as well. Just a sample of that includes the climate crisis, the rise of remote working, the acceleration of e-commerce and hybrid events, increasing resident and social discord, and serious workforce capacity issues hampering recovery.

Together, they have created new challenges of worrisome proportions on one hand, and also, a raft of new opportunities on the other.

The DestinationNEXT 2021 Futures Study looks at all of those challenges and opportunities through the lens of what destination leaders are seeing around the world, with the goal of building our industry back better than ever.

Work Plan

Phase 1: Global Advisory Group

The development of the 2021 Futures Study began in January 2021. 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 in Appendix E.

Phase 2: Major Trends Impacting the Global Visitor Economy

Extensive research was completed to identify key trends. Over 150 interviews were conducted with the Global Advisory Group and 6 Advisory Panels that were established to provide different perspectives on the future of our industry. Research was also completed on major trends in sectors beyond the visitor economy. The key takeaways from the interviews/research for each of the Panels is provided on pages 7-12.

Advisory Panels

1. Disruptors Panel

Platform businesses, technology providers and policy organizations

2. Industry/Association Panel

Leading industry and association thought leaders

3. Supply Chain Panel

Hotels, airlines, cruise lines, venues and service suppliers

4. Community Leaders Panel

Governments, foundations, nonprofits, economic development agencies

5. Client Panel

Meeting planners, event organizers and tour operators

6. Other Sectors Panel

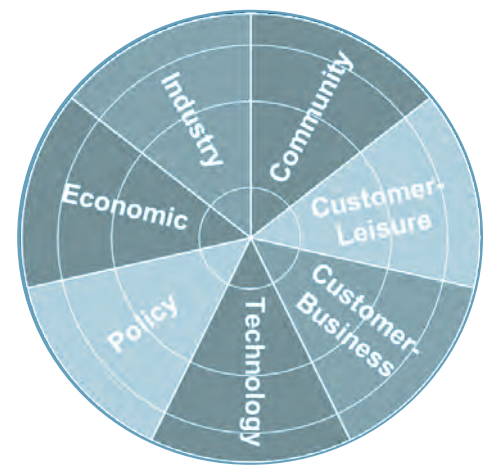
Leaders in key sectors beyond the visitor industry

The interviews and research in Phase 2 informed the creation of the list of 100 trends that will impact the visitor economy and destination organizations in the next three years. The list was developed and finalized by:

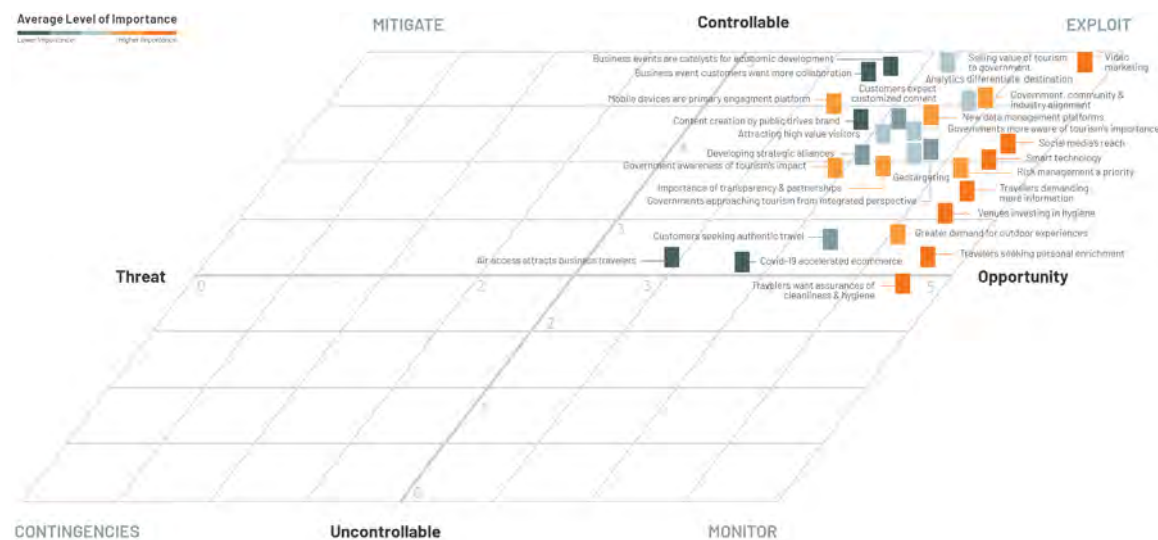
1. The Global Advisory Group
2. DestinationNEXT Project Team
3. Young, emerging professionals including Destination International's 30 Under 30 group and students at George Washington University's tourism program.

The 100 trends were bucketed into a Strategy Map to help structure the research process. The Project Team also completed a cluster analysis of the survey results to develop a new Future Map to determine key opportunities for destination organizations in the next 3 years. The full list of trends is in Appendix A.

Strategy Map - Trends



Future Map



Work Plan

Phase 3: Major Strategies for Destination Organizations

A list of 80 strategies was developed and categorized in a second Strategy Map around three pillars: Destination Marketing, Destination Management and Destination Organization. A new Futures Study 2021 Survey was prepared, asking respondents to rank the strategies in order of potential importance. There were also a number of additional questions relating to evolving roles and key performance indicators, shown on pages 23-24. The full list of strategies is in Appendix B.

The survey was distributed to Destinations International members and several other industry mailing lists, including: IMEX, ICCA, AACB, LATAM, UNWTO, ECM, PCMA, and several regional organizations. A total of 706 people from 52 countries participated in the survey.

Strategy Map - Strategies



706 Participants

52 Countries

Phase 4: Report & Presentation

The research guided development of the three new transformational opportunities presented in this report. A presentation deck has been prepared that includes numerous case studies and best practices to help implement the recommended strategies.

100 Trends

80 Strategies



Advisory Panel Takeaways

The 100 trends and 80 strategies in the DestinationNEXT survey were identified based on extensive research and individual interviews with industry and non-industry leaders across six advisory panels.

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



We can no longer superimpose our will on the ecologies that sustain us.

Disruptors Panel

We can no longer superimpose our will on the ecologies that sustain us. The health of the environment and all of the integrated systems it supports will increasingly define strategy for destination organizations in the future. The United Nations' Sustainable Development Goals provide the foundation for all of the accredited organizations that work with the global visitor industry to develop sustainability metrics.

The exponential increase in efforts to improve equity, diversity and inclusion across the visitor economy is not just about race, ethnicity, gender, sexual orientation, accessibility, age, etc.

Diversifying the spectrum of audiences coming together in any organization or destination fosters greater creativity and innovation. That leads directly to improving overall performance for the brand and increasing opportunities for individuals in any type of work or community environment.

Effective data management is now critical for delivering business intelligence to partners.

Today's improved and more affordable data platforms are redefining the relationship between destination organizations and their communities. It's now much easier to leverage these business intelligence tools to understand visitor behavior and spend; inform customer messaging; map a greater breadth of community and partner assets; and measure a wider variety of impacts better.

With the pending loss of third-party cookies, first-party data is key to owning your audience.

The continuing rise of community engagement and consumer-generated content platforms are providing new ways for governments, industry, communities, visitors and residents to share information with consent. New website, event, social media and mobile tracking tools are optimizing how local communities and global visitors can work together toward shared goals, and they provide more first-party data for participating organizations.

Travel companies and event organizations are increasingly developing subscription models to diversify and increase revenue streams. That also builds their customer base, increases first-party data, and personalizes customer and partner experiences more effectively across their value chain. The dramatic acceleration of e-commerce during Covid-19, the rise of streaming services, and the continual improvement of sophisticated digital subscription platforms signal a new era of opportunities for the visitor industry.

Covid-19 accelerated the shift toward a cashless, on-demand society. Improved digital inventory tools and mobile purchasing capabilities are helping more small businesses sell online and accept digital payments. The visitor industry must capitalize on the rise of in-destination visitor spending in real-time with so many more people comfortable with buying stuff on mobile anywhere they travel.



Industry/Association Panel

Destination and industry association leaders will increasingly have a bigger seat at more tables in order to influence policy and contribute to long-term solutions beyond the visitor economy.

Because of Covid-19 and the dramatic loss of taxes, workforce and visitor spend, governments at all levels are waking up to the widespread impacts that leisure and business travelers have on many different types of local businesses. That isn't going to last however if destination organizations don't expand and entrench long-term advocacy strategy.

Destination organizations are expanding their roles in many directions. They're aligning with government and community organizations more intentionally to support initiatives designed to improve social issues and local quality of life; fuel priority sector development; attract outside investment and high-value talent; and elevate the overall destination brand beyond a tourism lens.

Supporting innovation in workforce development and support services is critical as partners are faced with severe capacity shortages. The need for retaining and upskilling existing workers, and attracting new and previous members of the workforce, is going to be a challenge for all industries in the tourism and business event sectors. On the flip side, workforce development is one of the most effective ways to build public-private partnerships around shared goals.

Increasing, diversifying and retaining funding for destination organizations begins with getting a lot of traditional partners around the table, but most organizations don't do that effectively. Also, the number of Tourism Improvement Districts (TIDs) are rapidly growing in North America and Europe, which provide a significant increase in sustainable funding. In the U.S., 10 states are working on legislation to allow TIDs in 2021. Globally, more organizations are expanding their mandate from destination marketing to management to elevate their value and relevance in their communities, and further validate and/or increase their funding.

Recovery will be protracted and uneven, which will have profound long-term impacts. Traditionally underserved communities have been, and will continue to be, particularly hard hit. Many businesses are reverting to startup mode to innovate quickly and diversify their products for a wider breadth of markets. There will be continuing consolidations among airlines, tech providers, tour operators, and hotel companies. Also, more destination organizations will be developing coalitions and alliances, or merging outright, with other public and private organizations.

Destination International's research highlighting destination organizations as Shared Community Values is resonating with all ages of executives. Industry leaders add that the lexicon and values-based approach must be backed up with actions showing demonstrable value for the community.



Communities are not just something that we have. They're something we do.



Community Leaders Panel

The Covid-19 crisis forced economic development organizations to adapt to a new reality if they want to continue to be relevant. Many of them moved all training courses to an online platform but didn't change pricing significantly. In many cases, event attendance increased and overhead decreased substantially. EDOs are now investing in ways to increase their value proposition digitally.

The community is the destination. There's a shift from believing that the community should have a seat at the table to embracing the fact that the community is the table. Communities are not just something that we have. They're something we do.

Destination organizations are "missing in action" as community development engines and placemakers. Many communities are re-occupying their streets during Covid-19, and destination leaders need to be involved in those placemaking conversations. This can start with the basics by working together with community leaders to make streets clean and safe. Some have forgotten that.

The visitor industry needs to play a greater role in supporting local makers and enhancing arts and culture. That creates healthier and more vibrant communities, and it enhances the overall visitor experience. The maker and creative communities are an increasing competitive advantage for more destinations of all sizes.

Destination organizations need to play a greater role within their communities to support efforts related to macro social and environmental crises. These include climate change, education, homelessness, addressing the growing digital divide, and equitable economic development. Neighborhoods represent a continually shifting power base that empowers people and community groups to develop better and more resilient places to live, work, visit and invest in. Real change happens at the neighborhood level.

Tourism and event industry education and training should be focused on developing multiskill capacities for students to help them provide greater value for local businesses. The visitor industry overall needs to get in front of governments to develop and monitor re-training programs as the world comes out of the pandemic. Toward that end, destination organizations should be adding more board members who can influence public policy.

Destination organizations are collaborating more intentionally with the public and private sectors to improve mobility and connectivity infrastructure. More organizations are aligning with public and private stakeholders to advocate for improved transportation systems and broadband capacity. Improving mobility and connectivity in both urban and rural destinations is critical for sustainable and equitable growth. Those are among the most complex issues facing the global visitor industry today.



Supply Chain Panel

Destination organizations, venues, attractions and other partners are developing a whole-of-destination approach to promote the region. The goal is to provide more consultative, customized and comprehensive information and services for both the leisure and business event segments.

Airline routes have been cut drastically and many of those in secondary markets won't return for years. Destinations need to engage with government now on short and long-term air service development. The challenges will be further exasperated by what's expected to be significant drops in global corporate travel.

Massive workforce losses are impacting every industry across the travel and tourism sector. Both Covid-19 and decreasing interest among young people to enter/re-enter the visitor industry is hampering recovery. This is accelerating the development of public-private partnerships to address workforce development, and it's fueling the rise of investment in automation.

The significant migration toward smaller, more rural and resort-centric destinations is having widespread impacts on local communities unprepared for the influx. The real estate boom is pushing out long-term residents and diminishing workforce housing, and that's only increasing the existing resident discord in many places.

Digital nomads are increasingly a new visitor segment in many regions. Destinations need to be prepared for this new traveler and partner with other industries to provide a different type of visitor experience beyond those for short-term stays.

With the rise of more sophisticated destination websites and data management platforms, destination organizations are becoming a local resource for a much broader array of stakeholders beyond tourism and business events. Today, data drives community engagement across the visitor industry supply chain. That is expanding to include local organizations in agriculture, technology, transportation, manufacturing and retail, among other.

With Covid-19 wreaking havoc on global supply chains, more governments are now trying to build more domestic networks. Some destinations are leveraging business events to attract leaders in supply chain development and their relevant priority sectors.

Scenario models suggest that hotel, convention center, airport and cruise visitor volumes will return to pre-pandemic levels, eventually. The question is what will that all look like, and how will consumers and the experiences evolve? The next few years will witness a surge of innovation across the above industries and facilities. Owners and operators are investing in that now to gain early adopter competitive advantage.



Business event clients are looking for more help and flexibility to manage risk.

Client Panel

Hybrid meetings are here to stay based on the widespread adoption of video conferencing during the pandemic. Stakeholders across the industry are concerned about the impact on face-to-face business events. However, event decision-makers also see the potential to increase audience engagement, drive membership, and diversify revenue streams incrementally. In the end, the customer will validate, or not, the rise of omnichannel business events.

The business events industry is increasingly adopting a regional hub model where business events take place concurrently in different destinations worldwide. This distributed event model, rather than one global annual event, is being driven by the rise of hybrid event capabilities and the growing pushback against long-haul travel. Opportunities include increased attendance, membership and revenue, because more people will be willing to attend an event closer to home. In the short-term through the recovery, decisions will pit long-haul travel versus the “safe choice.”

Managers now need to go to greater lengths to justify the travel costs for face-to-face meetings, for both corporate travel and business events. Event owners, venues, logistic companies and others are collaborating more effectively today to present the business case and quality experience to justify getting on a plane.

Equity, diversity and inclusion have become among the biggest priorities for how association event professionals choose site locations.

Planners now need to be much more transparent with their stakeholders about how host cities are working with a diverse value chain of partners.

Business event clients are looking for more help and flexibility to manage risk. Planners are demanding more flexibility across the entire hospitality, logistics and venue value chain to bring back large business events.

Venues need to continue to invest in workforce development to improve digital literacy. Upskilling workforce and investing in new technologies will be a strong competitive advantage for venues.

Sustainability is now much more important for event owners and their partners. Covid-19 accelerated demand for lowering carbon impacts and optimizing efficiencies at business events. This now extends well beyond convention centers, and therefore, destination organizations are becoming more involved in working with partners to develop more holistic measurement tools.

Destination organizations need a more regional vision to connect event owners with a broader range of intellectual capital. Planners are asking what organizations can bring to the table beyond the borders of the destination to expand the pool of sector leaders; speakers and exhibitors; and new members, sponsors and customers.



Other Sectors Panel

One of the biggest evolutions in technology is the rise of the “metaverse,” also known as the Internet 3.0, AR Cloud, 3D or Spatial Web, or digital twinning. The future internet will include a virtual layer attached to many physical places and spaces, where people can shift between the physical and virtual realities within the same environment. Presently, technology platforms from Facebook to Fortnite are developing 3D web experiences for connecting people in new ways, which will impact everything from travel to entertainment, ecommerce and the workplace.

E-gaming surged exponentially during the pandemic, and more companies are developing physical esports venues and experiences to capitalize on the popularity. Interestingly, the lifestyle and community elements inherent in gaming culture are driving consumer spending as much as the games themselves. Esports provide a wealth of insight for business event leaders about new engagement and business model strategies.

Covid-19 highlighted the gaps in urban and rural broadband infrastructure and capacity. That’s hampering how destinations are attempting to diversify their economies. The rise of remote work and education is exacerbating the “digital divide” between economic classes. New government policies are redefining broadband as an essential utility for affordable and rural housing.

Smart city strategies are evolving beyond mere technology with the goal of being more equitable and effective. Urban innovation is expanding to address neighborhood development, community engagement, social justice, academic opportunity, etc. Destination organizations are now working with a wider range of government, urban, tech and civic leaders to support efforts toward building more livable cities.

Artificial intelligence pervades almost every aspect of our lives, and the technology is still in its infancy. Optimally, AI is evolving to predict what we want and what we don’t know we might want. From a travel perspective, AI enhances efficiencies related to security, e-commerce, marketing, communications, transportation and navigation, just for starters. The big challenge in the future is AI replacing back-office jobs, as well as consumer-facing, which is added impetus for up-skilling workforce today.

Covid-19 put a spotlight on mental wellbeing as a mainstream focus, in addition to physical health. Today, mental/emotional health is no longer a taboo subject, and companies in every sector are increasingly addressing the relationship between how workforce feels and performs. The increasing focus on holistic wellbeing is evolving in the visitor economy, externally in terms of product development, and internally regarding human resources. The future of opportunities in travel and tourism, across every realm, are human centric.

Survey Profile

Global Outreach

Two global surveys were distributed in Q2 2021 for participants to rank the industry trends and 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.

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

The response to the strategy survey was strong with 706 industry leaders in 52 countries participating in the survey. The survey cast a wide net in terms of international coverage as well as the size, mandate and business model of organizations. A complete list of survey participants is included in Appendix G.

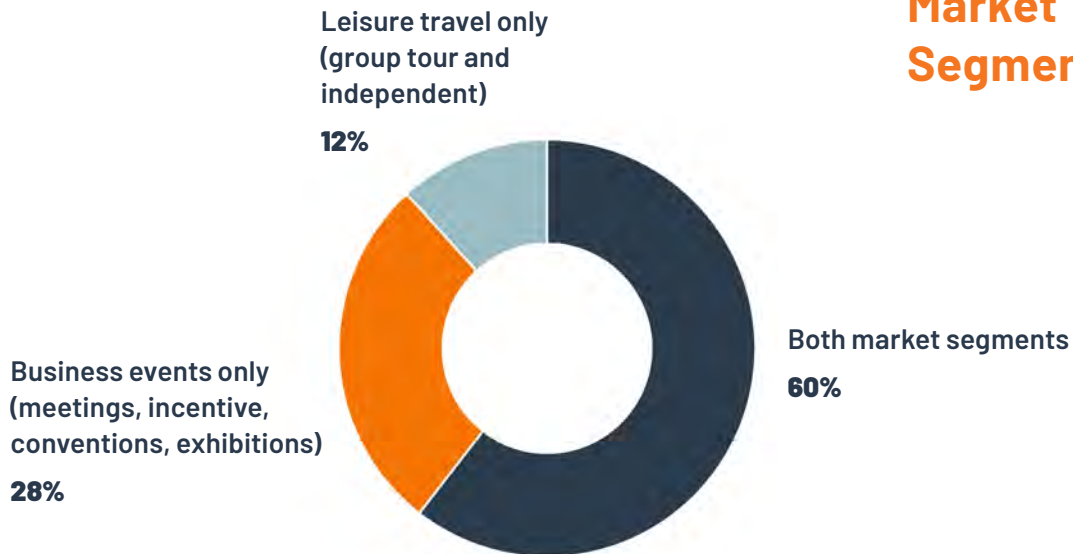


Argentina	Dominican Republic	Ireland	Paraguay	Sweden
Australia	Ecuador	Israel	Peru	Switzerland
Austria	El Salvador	Italy	Poland	Taiwan
Bermuda	Estonia	Japan	Rwanda	Thailand
Brazil	Finland	Kenya	Russia	United Arab Emirates
Canada	France	Malaysia	Scotland	United Kingdom
Chile	Germany	Mexico	Singapore	United States
China	Ghana	Netherlands	Slovenia	Uruguay
Colombia	Greece	Nicaragua	South Africa	
Costa Rica	Guatemala	Oman	South Korea	
Denmark	Honduras	Panama	Spain	

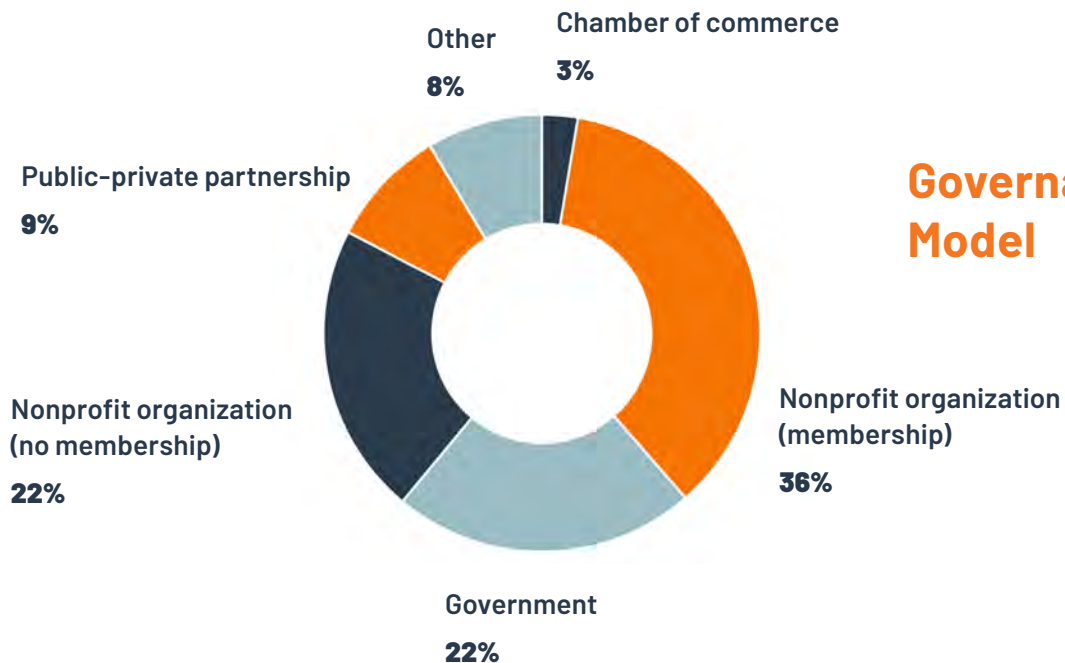
706 Participants

52 Countries

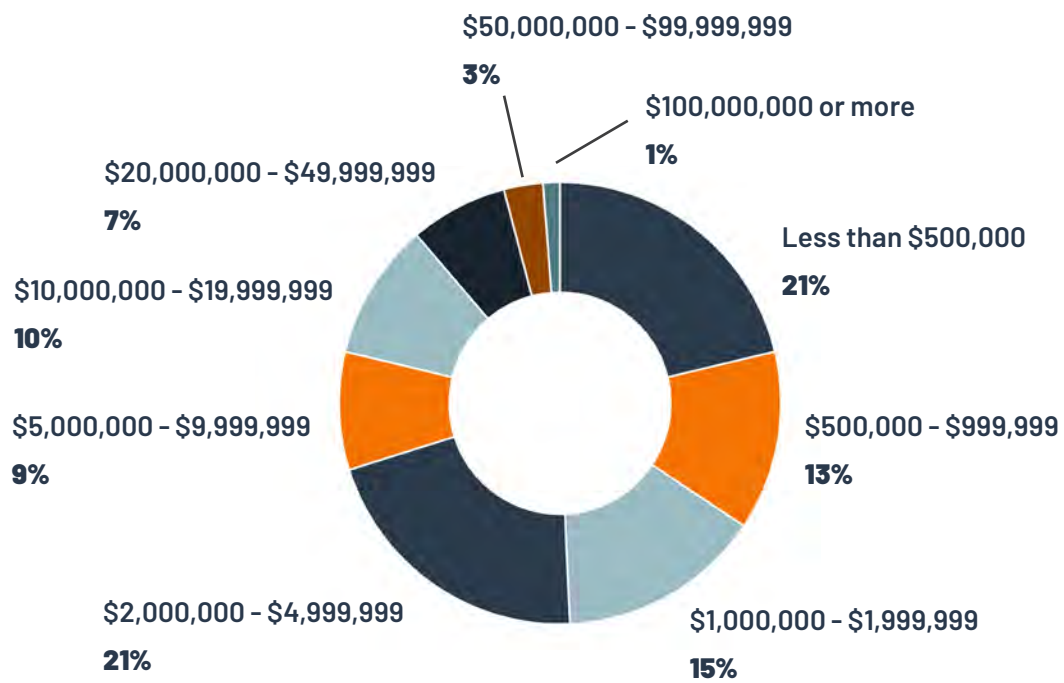
Market Segment



Governance Model



Business Model





Top 25 Trends

These are the top 25 out of 100 ranked industry and consumer trends. The change in ranking from DestinationNEXT 2019, or if the trend is new this year, is indicated for each. The complete list of trends is included in Appendix A.

Trend Ranking

Change

1.	Greater industry, community and government alignment is driving destination competitiveness and brand	New
2.	Customers are increasingly seeking a unique, authentic travel experience	▼1
3.	Content creation and dissemination by the public across all platforms drives the destination brand and experience	▼1
4.	Video becomes the new currency of destination marketing and storytelling	▼1
5.	Travelers are demanding more personalized information, control and interaction	▲2
6.	Travelers are seeking more personal enrichment and wellbeing	▲10
7.	Social media's increasing prominence in reaching the travel market	▼4
8.	Mobile devices are becoming the primary engagement platform for travelers	▼2
9.	Customers increasingly expect highly curated and customized destination content	▼1
10.	Travelers want assurances of high standards of cleanliness and hygiene	New
11.	Better data management platforms are helping optimize strategy	New
12.	Air access to a destination is key factor in attracting business travelers	▲3
13.	The destination brand is a more important factor for choosing a destination	▲5
14.	Greater demand for more dynamic outdoor experiences	New
15.	Business event customers are looking for better collaboration with destinations to achieve greater business outcomes	▲11
16.	New data management platforms provide 360-degree view of customers and marketplace	New
17.	Geotargeting and localization becoming more prevalent	▼7
18.	Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources	▼5
19.	Governments approaching tourism from an integrated, multi-departmental perspective focused on economic development	▲2
20.	Risk management now a top priority	New
21.	Venues are making significant investments in hygiene and spacing protocols	New
22.	More communities are aware of importance of tourism to local economy and job growth	▼8
23.	Covid-19 dramatically accelerated e-commerce	New
24.	Governments are more aware of the visitor economy's impact on jobs, tax base and the overall economy	New
25.	Increasing importance of transparency and building partnerships to secure business to a destination	▼13

Future Map

2021 Opportunities

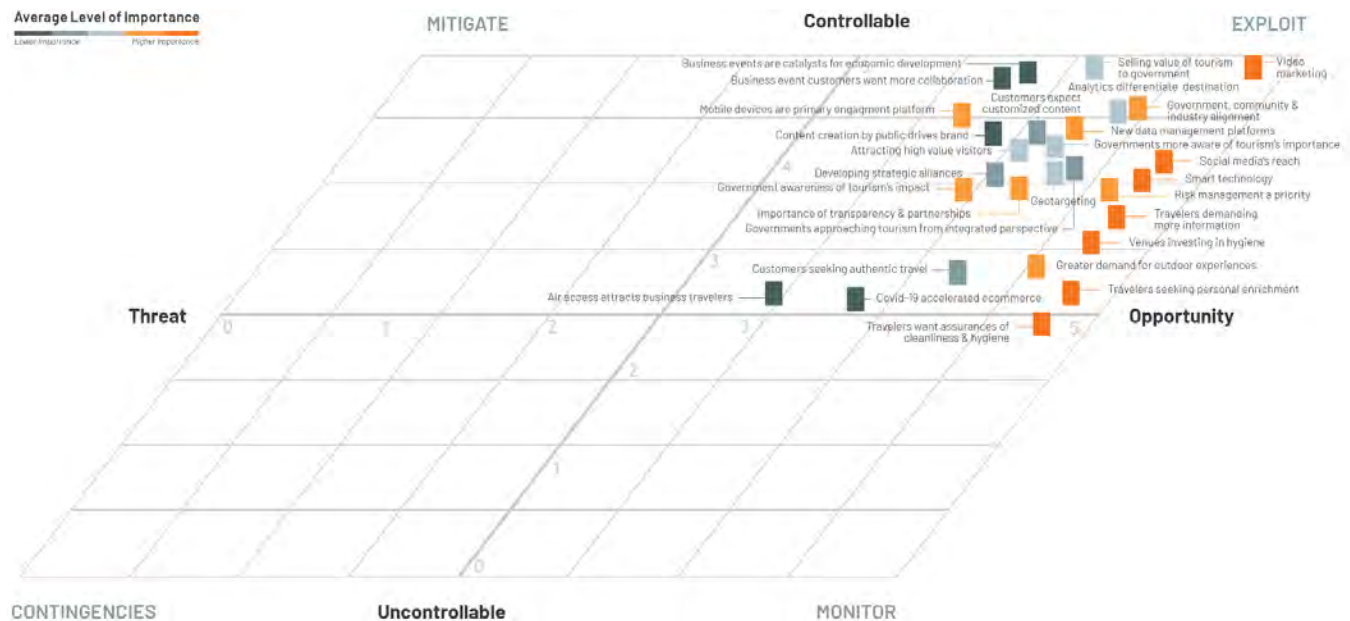
The top 25 trends, plus a selection of other top trends from leisure-only and business event-only destinations, were plotted on a Future Map that assessed each trend based on:

- **Degree to which the trend is an opportunity or threat to the destination**
- **Degree of control that a destination organization has to influence or capitalize on this trend**

Rather than a conventional SWOT analysis, a Future Map helps destination organizations focus on the trends that they can impact.

The analysis in 2021 identified all of the top trends, except one, as of opportunities to exploit, as illustrated in the upper right quadrant of the grid.

“A Future Map helps destination organizations focus on the trends that they can impact or affect. The analysis in 2021 identified all of the the top trends, except one, as opportunities to exploit.”





Top 25 Strategies

These are the top 25 out of 80 ranked strategies for destination organizations. The change in ranking from DestinationNEXT 2019, or if the strategy is new this year, is indicated for each. The complete list of strategies is included in Appendix B.

Strategy Ranking

Change

1.	Focus significant attention on content creation and dissemination strategies	▲2
2.	Play more of a central role in advocacy in my destination	0
3.	Enhance engagement with the local community to manage future considerations for the visitor economy	▼2
4.	Build the destination brand around the community's goals, values and creative energy	New
5.	Focus on developing authentic experiences for the customer	▲2
6.	Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume	▲4
7.	Develop a destination master/management plan to define long-term strategy	▲1
8.	Be more involved in economic development initiatives	▲12
9.	Better integrate tourism, economic development and talent attraction	▲2
10.	Invest more effort and resources into video content to market the destination	▼6
11.	Connect visitor experience with the quality of life of residents in my community	▲15
12.	Develop greater capabilities in data management	New
13.	Improve and align data management and digital strategy to optimize marketing ROI	New
14.	Develop strategies to protect what we have while attracting visitation to our community	▲1
15.	Form more strategic alliances outside the visitor industry	▼1
16.	Protect and steward our natural environment and our authentic social and cultural characteristics	▼4
17.	Acquire competencies and skill sets to effectively compete in a disruptive economy	▲5
18.	Put in place digital systems and services to keep pace with customer demand	▲11
19.	Design digital customer engagement primarily around mobile	▼10
20.	Have a greater role in policy and product development	▲7
21.	Diversify revenue sources to maintain/expand current funding levels	▲19
22.	Actively encourage policy makers to reduce barriers to travel	▲21
23.	Agree to uniform methodology with other destination organizations to measure economic impact	▼10
24.	Balance the need for growth with responsible and sustainable development	▼7
25.	Develop a sustainable tourism and events strategic framework	New

Roles & KPIs

The Destination Organization of the Future

The 2021 Futures Study survey asked participants to rank their most important organizational roles and key performance indicators (KPIs), both for today and ideally what they believe they will see in three years.

There will be some significant shifts in priorities between now and the future.

From an organizational roles perspective, destination leaders are especially eager to expand more into:

- Destination and product development
- Data research and business intelligence
- Visitor experience and services
- Workforce development

In terms of KPIs, there is going to be a greater emphasis in upcoming years on measuring:

- Visitor satisfaction
- Resident sentiment
- Social and environmental impacts

Organizational Roles		2021	Ideal in 3 Years
Destination marketing		1	1
Brand management		2	2
Destination and product development		7	3 (▲4)
Data research and business intelligence		8	4 (▲4)
Destination information resource		3	5
Community relations		4	6
Industry advocate		5	7
Visitor experiences and services		11	8 (▲3)
Broader economic development		6	9
Meetings and conventions sales		9	10
Sustainability advocate		13	11
Equity, Diversity, Inclusion advocate		10	12
Major event partner/developer		14	13
Workforce development		17	14 (▲3)
Health and safety resource		12	15
Leisure sales (group tour & independent)		16	16
Convention services		15	17
Venue operator		18	18
Key Performance Indicators			
Economic impact of tourism		1	1
Room nights generated		2	2
Visitor satisfaction		9	3 (▲6)
Number of visitors/delegates		4	4
Resident sentiment		12	5 (▲7)
Marketing ROI		6	6
Hotel performance metrics		3	7
Social and environmental impacts		15	8 (▲7)
Overnight visitation		5	9
Leads/referrals to business		7	10
Social media metrics		8	11
Member satisfaction		10	12
Earned media		11	13
Conversion metrics		14	14
Venue profits		13	15

3 Transformational Opportunities

We believe that the future of destination organizations revolves around three transformational opportunities. Destination leaders need to leverage all three of these opportunities collectively to effectively lead their organizations today.

Destination Alignment

Destinations of all sizes are more competitive in the global visitor economy when government, community and industry priorities are aligned as much as possible. A whole-of-destination approach, where the public, private and civic sectors are all speaking to each other, creates stronger communities that elevates the visitor experience, supports sustainable and economic development across all sectors, and improves quality of life for residents.

Sustainable Development

The visitor industry has talked about the critical importance of economic, sociocultural and environmental sustainability for decades, and Covid-19 showed why it's critical. The United Nations' 17 Sustainable Development Goals provide a uniform road map for improving all aspects of how the visitor economy impacts local communities, and how to spread the benefits of visitor spending more sustainably and equitably. A balanced approach for sustainable development and managed growth is key for destination organizations to increase their relevance and impact.

Values Based Marketing

The overall quality of a destination's visitor experience includes what local communities value, and how residents are striving to achieve their collective goals. Coming out of Covid-19, that creative, cultural and community energy is becoming a greater competitive advantage to help destinations not just be known, but be known for something. Repeat visitors return to the same destinations because they want to be part of a community where the local cultural DNA aligns with their own identity and priorities. Communicating that subjective quality represents the next evolution of destination marketing.

Together, the three transformational opportunities provide an integrated framework to formulate strategic decision making in any destination organization of any size or budget. They have evolved since DestinationNEXT 2019 based on:

1. The Covid-19 pandemic highlighted in no uncertain terms how all of the different segments of the visitor economy support small businesses across many different industries, above and beyond the major visitor assets. Governments today are much more aware of the value of visitors for many of their constituents.
2. There have been significant advances in data management platforms that collect multiple data sources into one easy-to-understand dashboard, versus in the past where destination organizations had to purchase individual data sources. Pricing today for these platforms is also much more approachable, and they're evolving as a powerful conduit for sharing customized data sets with various public and private stakeholder audiences.
3. The Black Lives Matter Movement in 2020 was a catalyst for elevating equity, diversity and inclusion as a mainstream conversation about actionable initiatives to impact real-world change. There is now increasing focus on exploring how diversity is a wellspring for creativity and innovation that drives performance for all organizations and destinations.
4. The shutdown of the travel and tourism sector and many other industries dramatically improved environmental conditions around the world. The climate crisis, ocean pollution, decreasing biodiversity, and continued degradation of ecological systems everywhere are now top-of-mind for many more consumers. Destination organizations must have better understanding about how the visitor economy is impacting the health of their communities and environment.
5. Covid-19 gave industry leaders and consumers a long time to re-evaluate their values and goals related to travel, as well as many other issues. It's still too early to tell how visitor motivations are evolving long-term. But clearly, more destination organizations are highlighting what their residents and community organizations are prioritizing to help connect with like-minded visitors on a more subjective, human level.

Destination Alignment

Every destination is made up of interconnected networks and complex systems. A visitor will encounter and patronize many of those, spanning a range of industry stakeholders, community organizations and events, small businesses, and all of the infrastructure that connects a destination. The leisure or business traveler isn't generally aware of how he or she is navigating so many of these interrelated elements that make up a destination, but all of them impact and influence the visitor in some way.

Therefore, how well government, community and industry leaders work together influences how well visitors will experience the destination. It impacts where visitors travel in the region and for how long, when they go and why, how much they spend, what types of businesses they patronize, and what they share on social media, etc. It impacts why they even show up in the first place.

This is not a new concept. The World Economic Forum's biannual Travel & Tourism Competitive Index ranks the competitiveness of countries based on exactly how well the public, private and civic sectors collaborate across a wide spectrum of initiatives to elevate quality of place for visitors and quality of life for locals. In no uncertain terms, the Index shows how efforts to improve quality of place and life benefit and build upon each other.

The visitor industry at the municipal level, however, has never really fully grasped that community wellbeing drives competitiveness in the travel and tourism sector.

Because of Covid-19, there is now much greater awareness at the municipal, town and county level of how and why governments, community organizations and the visitor industry are all linked. And, furthermore, the pandemic showed how they all share many like-minded goals for each of their audiences, related to community and neighborhood development, equitable workforce development, small business and priority sector growth, etc.

The oft-used adage: "What benefits locals benefits visitors" has always been something that destination leaders liked to say. Looking ahead, more and more of them are focusing on exactly what that means and how to accomplish it.

"All of us need to change our patterns of thinking because our visitors' patterns of behavior have already changed," said Petra Stušek, CEO at Ljubljana Tourism and president of the board at European Cities Marketing. "Tourism by itself is no longer the prime focus for us. We're developing a greater systems approach, and meeting with governments and community leaders more regularly, to define how our industry is a catalyst for so many other industries. We absolutely have to take good lessons out of the crisis and make tourism a greater value for humanity in general."



“The visitor industry at the municipal level has never fully grasped that community wellbeing drives competitiveness in the travel and tourism sector.”

Trends & Strategies

- The #1 ranked trend in 2021 is new: “Greater industry, community and government alignment is driving destination competitiveness and brand.” That suggests a clear signal that the visitor industry is prioritizing government and community engagement more than ever before.
- “Play more of a central role in advocacy in my destination” is the #2 strategy. Advocacy and public policy are areas where destination organizations are significantly increasing investment as they emerge from the crisis.
- The trends and strategies related to data management ranked higher in 2021. Business intelligence is the foundation for aligning the public, private and civic sectors.
- The #9 strategy overall – “Better integrate tourism, economic development and talent attraction” – was ranked #2 by young leaders.
- “Develop a destination master/management plan to define long-term destination development” moved up to the #7 strategy, indicating the need for more comprehensive planning based on shifting roles.
- “Expand engagement with universities, research institutions and advanced/creative industries to better attract high-value business events” is the #1 strategy for business event-only organizations (see page 39).
- The #3 strategy – “Enhance engagement with the local community to manage future considerations for the visitor economy” – provides some of the biggest opportunities for differentiating the destination.

Trends Related to Destination Alignment

1. Greater industry, community and government alignment is driving destination competitiveness and brand
10. Travelers want assurances of high standards of cleanliness and hygiene
11. Better data management platforms are helping optimize strategy
12. Air access to a destination is key factor in attracting business travelers
18. Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources.
19. Governments approaching tourism from an integrated, multi-departmental perspective focused on economic development
20. Risk management now a top priority
22. More communities and municipal governments are aware of importance of tourism to local economy and job growth
24. Governments are more aware of the visitor economy's impact on jobs, tax base and overall economic impact
25. Increasing importance of transparency and building partnerships to secure business to a destination
26. DMO/CVBs are changing their advocacy approach to sell value of visitor economy more effectively to government
27. Greater focus on equity, diversity and inclusion in the workplace and across the supply chain
29. Disruptions from changing business models, terrorism, pandemics and disasters will increasingly impact how destinations think and act
38. Resident sentiment is becoming a key measurement
40. Industry-generated taxes increasingly vulnerable to alternative politically based projects

Strategies Related to Destination Alignment

2. Play more of a central role in advocacy in my destination
3. Enhance engagement with the local community to manage future considerations for the visitor economy
7. Develop a destination master/management plan to define long-term destination development
9. Better integrate tourism, economic development and talent attraction
14. Develop strategies to protect what we have while attracting events and visitation to our community
15. Form more strategic alliances outside the visitor industry
21. Diversify revenue sources to maintain/expand current funding levels
22. Actively encourage policy makers to reduce barriers to travel
23. Agree to uniform methodology with other destination organizations to measure economic impact
26. Leverage improved data management tools for advocacy and community engagement efforts
29. Pay close attention to safety, health and security as a strategic consideration in our future planning
33. Develop outreach programs in the local community to broaden our networks
34. Increase support for local small businesses and community groups
38. Emphasize market segmentation that aligns with public/private sector priorities
40. Expand mandate to broaden our impact and relevance in the community

Sustainable Development

Destination organizations have been expanding their roles in destination, product and community development for decades. Many now have departments focusing specifically on improving the supply side of the visitor economy by providing their networks, expertise and resources to local partners invested in developing the destination.

The focus, however, hasn't always prioritized sustainable development, which includes environmental, sociocultural and economic resilience. Covid-19 clearly showed what happens when destinations and industries haven't prepared for cataclysmic shocks, nor dealt with the chronic stresses that lead to, or exacerbate, those shocks.

In 2021, there is no end of discussion about how destination organizations need to support the development of a more sustainable and equitable visitor economy. How to accomplish that, and to what degree, is pitting two sides of the visitor industry against each other. There are those who believe Covid-19 wiped the slate clean on the status quo, and now is a once-in-a-century opportunity to "build back better." Others, though, have hunkered down throughout the pandemic, and they're simply waiting for the status quo to return, because for many industry stakeholders, the status quo was pretty good.

On the social justice side of the equation, the conversation around equity, diversity and inclusion is now mainstream. A wide breadth of the travel and tourism sector is making positive strides toward driving real impacts in their organizations and communities. There is general agreement that everything happening now is just a start, but there has clearly been a significant change in how the industry is moving forward.

On the environmental sustainability side, there is much less intention and collective agreement about addressing the health of our planet. A growing volume of destinations are developing and supporting new initiatives to decrease the sector's carbon footprint. Many more, though, are avoiding action based on the belief that tackling environmental degradation doesn't fall within their mandate.

The United Nations' 17 Sustainable Development Goals (SDGs) provide a uniform global road map for strategies to improve the health and wellbeing of communities of all sizes, related to people and planet. They are the foundation for the many accredited organizations that work with destination organizations to develop strategic planning related to sustainable and equitable destination development.

The global visitor industry should expect to see the SDGs become a much bigger theme in coming years. Young leaders especially are pressuring the industry to do more. Destination organizations can ensure their continued relevance by providing a bigger, more global platform for knowledge sharing and action around sustainable development. Other major sectors are arguably well ahead of travel and tourism. The visitor industry is now at a crossroads, but it remains to be seen if it's going to close the gap between what it espouses and what it actually delivers.



“In 2021, there is no end of discussion about how destination organizations need to support the development of a more sustainable and equitable visitor economy.”

Trends & Strategies

- “Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume” is the #6 strategy overall, and the #1 strategy among young leaders (see page 54).
- “Customers are increasingly seeking a unique, authentic travel experience” is the #2 trend; and “Focus on developing authentic experiences for the customer” is the #5 strategy. Authenticity is taking on new meaning in 2021 relating to sustainability and diversity.
- The #14 trend — “Greater demand for more dynamic outdoor experiences” is new for 2021. The surge in demand for non-urban travel is expected to remain post-pandemic, and destinations are exploring ways to innovate.
- “Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts” ranked only #32 in trends. That suggests there is a long way to go to elevate the importance of sustainable development across the sector.
- “Develop a sustainable tourism and events strategic framework” was the #25 strategy overall. It was the #2 strategy in Europe and #6 in Asia.
- The #15 trend — “Business event customers are looking for better collaboration with destinations and suppliers to achieve greater business outcomes” is new for 2021. That correlates with the #31 trend: “Business events are increasingly being positioned as catalysts for long-term economic development for communities.”

Trends Related to Sustainable Development

- 2. Customers are increasingly seeking a unique, authentic travel experience
- 14. Greater demand for more dynamic outdoor experiences
- 15. Business event customers looking for better collaboration with destinations and suppliers to achieve greater business outcomes
- 21. Venues are making significant investments in hygiene and spacing protocols
- 28. Greater focus on placemaking to benefit both locals and visitors
- 30. Communities expect to be more engaged in the development and management of the destination experience
- 31. Business events are increasingly being positioned as catalysts for long-term economic development for communities
- 32. Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts
- 33. Hybrid events will decrease hotel room nights and overall visitor volume
- 36. Everyone is focusing on attracting “high value” visitors to increase economic impact
- 37. Domestic travelers will be a priority market for the foreseeable future
- 39. Meeting planners are increasingly booking smaller midsize cities for business events

Strategies Related to Sustainable Development

- 5. Focus on developing authentic experiences for the customer
- 6. Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume
- 8. Be more involved in economic development initiatives
- 11. Connect visitor experience with the quality of life of residents in my community
- 16. Protect and steward our natural environment and our authentic social and cultural characteristics
- 20. Have a greater role in policy and product development
- 24. Balance the need for growth with responsible and sustainable development
- 25. Develop a sustainable tourism and events strategic framework
- 35. Invest in talent to manage/analyze large and complex data for my destination

Values Based Marketing

Almost every industry in every sector prioritizes consumer loyalty and customer lifetime value over everything else. From a travel perspective, that means repeat visitation is a core priority, but how does the industry actually accomplish that?

For destination organizations, loyalty has always proven to be a thorny issue. They don't have a direct booking engine to capture visitors and incentivize loyalty directly like hotels, cruise lines, air carriers and others do. For destination leaders to increase repeat visitation, they must instead invest in community building and consumer data to match visitor profiles and supply-side experiences as effectively as possible.

Here's why...

Repeat visitors don't return to a destination to feel like a tourist. For many, they return because they want to feel like they're part of the local community where they share the same values, passions and like-minded interests. The identity of a particular neighborhood, defined by its lifestyle, way of life, community and cultural DNA, etc., is the destination's competitive advantage to help drive incremental repeat visits, above and beyond the physical attributes.

For years now, more destination organizations have been promoting the goals, values and creative energy of local residents and organizations to define and differentiate the destination brand. As travel experiences become more and more commoditized, it's the people behind the experiences and their community supply chains who can communicate the nuances of any destination best.

That has scaled worldwide during Covid-19, ranging from large cities like Singapore, Helsinki and Fort Worth; nations such as Canada and Colombia; and smaller towns like Jackson Hole, Wyoming and Carson Valley, Nevada.

The organizations responsible for driving visitor demand in those destinations, as well as many others, are positioning the community as the destination. That's what they're promoting. One mountain town or seaside resort or global capital city might look a lot like another in their competitive set from a consumer perspective. Promoting what the community stands for, and what it's trying to achieve and why, and how a visitor can plug into that energy, is a new due north for destination marketers.

"How we interpret place defines our identity," said Zita Cobb, founder of Fogo Island Inn in Newfoundland, and a Destination Canada board member. "It's not just about the physical place. It's what we do with it together as communities that makes us who we are."



“Repeat visitors don’t return to a destination to feel like a tourist. They return because they want to feel like they’re part of the local community.”

Trends & Strategies

- The #4 strategy overall – “Build the destination brand around the community’s goals, values and creative energy” is new for 2021. The fact that this is new and ranked so high suggests that destination organizations are expanding on what “the visitor experience” means, and what they’re actually promoting to differentiate the destination.
- “Travelers are seeking more personal enrichment and wellbeing” shot up 10 points in the trends to #6. The growth of interest in transformational or purposeful travel during the last decade provides extensive opportunities for innovation in product development and community engagement. The challenge is designing experiences that deliver on the promise.
- The #27 strategy is “Increase and prioritize messaging for the high-value, mindful visitor who contributes more to our community, economically and otherwise.” Every destination today is attempting to increase yield and attract more visitors who are intentional about their impacts in a community.
- Video messaging placed high in both trends and strategies. However, young leaders ranked “Invest more effort and resources into video content to market the destination” (#10 overall) at #28, while the 65+ group ranked it #2. The medium is perhaps not the message for the next generation of destination executives.
- “Design digital customer engagement primarily around mobile” is the #19 strategy, but many destination organizations are not fulfilling this to the degree they could be.

Trends Related to Values Based Marketing

3. Content creation and dissemination by the public across all platforms drives the destination brand and experience
4. Video becomes the new currency of destination marketing and storytelling
5. Travelers demanding more personalized information, control and interaction
6. Travelers are seeking more personal enrichment and wellbeing
7. Social media's increasing prominence in reaching the travel market
8. Mobile devices are becoming the primary engagement platform for travelers
9. Customers increasingly expect highly curated and customized destination content
13. The destination brand is a more important factor for choosing a destination
16. New data management platforms provide 360-degree view of customers and marketplace
17. Geotargeting and localization becoming more prevalent
23. Covid-19 dramatically accelerated e-commerce
34. Event attendees and participants are increasingly expecting a fully developed hybrid experience
35. Expect more privacy and security protocols to protect online consumers

Strategies Related to Values Based Marketing

1. Focus significant attention on content creation and dissemination strategies
4. Build the destination brand around the community's goals, values and creative energy
10. Invest more effort and resources into video content to market the destination
12. Develop greater capabilities in data management
13. Improve and align data management and digital strategy to optimize marketing ROI
17. Acquire competencies and skill sets to effectively compete in a disruptive economy
18. Put in place digital systems and services to keep pace with customer demand
19. Design digital customer engagement primarily around mobile
27. Increase and prioritize messaging for the high-value, mindful visitor who contributes more to our community, economically and otherwise
28. Connect with customers through all stages of their experience
30. Participate more in building platforms to improve the visitor experience
31. Develop visitor messaging to answer demand for transformational/purposeful travel
32. Elevate our destination brand by promoting progressive people and organizations invested in sustainability and equality
36. Take on a greater role as cultural champion of my destination
37. Place greater emphasis on engaging with customers in two-way conversations, more so than one-directional communication
39. Use collaborative technology as a core strategy for my destination organization

Business Event Organizations

These are the top 50 strategies for destination leaders at convention bureaus that are responsible exclusively for developing and promoting business events. The priority of strategies differs significantly from the main aggregate list of strategies that were ranked by organizations across all mandates.



Business Event Strategies

1. Expand engagement with universities, research institutions and advanced/creative industries to better attract high-value business events
2. Leverage our region's priority economic sectors to generate business events
3. Play more of a central role in advocacy in my destination
4. Agree to a uniform methodology with other destination organizations to measure economic impact
5. Redevelop incentive strategies with partners for attracting business events
6. Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume
7. Pay close attention to safety, health and security as a strategic consideration in our future planning
8. Better integrate tourism, economic development and talent attraction
9. Develop strategies to protect what we have while attracting events and visitation to our community
10. Acquire competencies and skill sets to effectively compete in a disruptive economy
11. Place greater emphasis on engaging with customers in two-way conversations, more so than one-directional communication
12. Form more strategic alliances outside the visitor industry
13. Build the destination brand around the community's goals, values and creative energy
14. Place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination
15. Balance the need for growth with responsible and sustainable development
16. Enhance engagement with the local community to manage future considerations for the visitor economy
17. Develop a sustainable tourism and events strategic framework
18. Diversify revenue sources to maintain/expand current funding levels
19. Connect with customers through all stages of their experience from awareness to interest to booking to visiting to post-visit
20. Be more involved in economic development initiatives
21. Focus on developing authentic experiences for the customer
22. Work closely with associations to help them achieve their legacy objectives
23. Develop outreach programs in the local community to broaden our networks
24. Act as conduit to build social networks among our local business community
25. Put a greater emphasis on market segmentation that aligns with public/private sector priorities

Business Event Strategies

26. Invest more effort and resources into video content to market the destination
27. Elevate our destination brand by promoting progressive people and organizations invested in sustainability and equality
28. Play a greater role in the creation of events to animate the destination
29. Focus significant attention on content creation and dissemination strategies
30. Put in place digital systems and services to keep pace with customer demand
31. Protect and steward our natural environment and our authentic social and cultural characteristics
32. Increase direct involvement in risk assessment and mitigation strategies for business events
33. Engage in scenario planning to help be prepared for future disruptions and opportunities
34. Develop a destination master/management plan to define long-term destination development
35. Increase and prioritize messaging for the high-value, mindful visitor who contributes more to our community, economically and otherwise
36. Develop greater capabilities in data management and digital experience strategy
37. Use collaborative technology as a core strategy for my destination organization
38. Adjust roles/expertise and become more consultative engagement and experience managers
39. Actively encourage policy makers to reduce barriers to travel
40. Support regional and national initiatives to improve mobility and connectivity
41. Leverage improved data management tools for advocacy and community engagement efforts
42. Develop visitor messaging to answer demand for transformational/purposeful travel
43. Expand how we promote our partner capacities in hybrid events and digital engagement
44. Develop more comprehensive KPIs to improve equity in our organization and ecosystem of vendors
45. Develop a much more comprehensive crisis management strategy with new protocols related to all types of crises
46. Expand engagement with educational institutions to support equitable workforce development
47. Expand networks and collaboration with health, safety and security organizations to improve our destination's resilience to future shocks
48. Participate more in building platforms to improve the visitor experience
49. Connect visitor experience with the quality of life of residents in my community
50. Adopt operating standards and consistent measures of performance with other destination organizations

DestinationNEXT Scenario Model

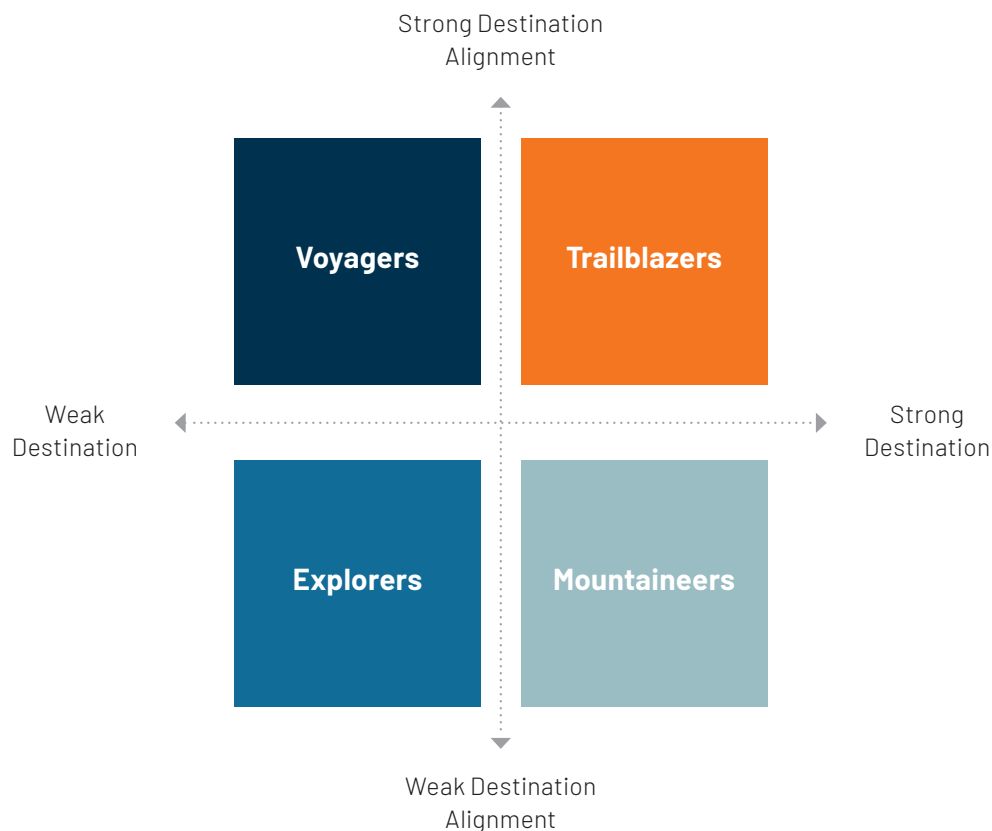
The updated DestinationNEXT Scenario Model & Assessment Tool is a diagnostic community platform to measure how local stakeholders perceive the overall competitiveness of the destination's visitor economy.



DestinationNEXT Assessment

The DestinationNEXT Scenario Model & Assessment Tool is the only strategic framework for destinations of its kind. It combines the most wide-ranging industry research available with a comprehensive survey for community and stakeholder input to provide destination organizations with strategies for sustainable growth.

The self-guided online survey identifies the most significant opportunities and challenges in the destination related to both the visitor experience and the local community. Then the data is plotted into the Scenario Model below, where the rankings can be compared anonymously against other destinations with similar visitor markets. Furthermore, the assessment tool is a robust community engagement platform that fosters conversation among stakeholders, and residents if desired, to develop a shared vision for the future of the destination.



DestinationNEXT 2.0

To ensure proper representation of emerging and future industry trends as they evolve, the new DestinationNEXT 2.0 assessment launched for 2021. The updated tool now includes 24 variables (up from 20 previously), related to destination strength and destination alignment. Within each variable, a series of specific sub-themes with measurable metrics offer destination leaders a wealth of in-depth data to support better decision-making.

The updated variables in 2021 are related to: health and safety; equity, diversity and inclusion; sustainability and resilience; arts, culture and heritage; outdoor recreation and sports; and emergency preparedness. The DestinationNEXT assessment can also be customized with additional questions to address issues specific to the community. When the survey is complete, the organization can distribute the final data to key stakeholders.

The 24 variables in the DestinationNEXT 2.0 Assessment are:

Destination Strength

- 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. 100 Trends
- B. 80 Strategies
- C. Strategies by Region
- D. Strategies by Age
- E. Global Advisory Group
- F. Advisory Panels
- G. Survey Participants

100 Trends

Change

1.	Greater industry, community and government alignment is driving destination competitiveness and brand	New
2.	Customers are increasingly seeking a unique, authentic travel experience	▼1
3.	Content creation and dissemination by the public across all platforms drives the destination brand and experience	▼1
4.	Video becomes the new currency of destination marketing and storytelling	▼1
5.	Travelers are demanding more personalized information, control and interaction	▲2
6.	Travelers are seeking more personal enrichment and wellbeing	▲10
7.	Social media's increasing prominence in reaching the travel market	▼4
8.	Mobile devices are becoming the primary engagement platform for travelers	▼2
9.	Customers increasingly expect highly curated and customized destination content	▼1
10.	Travelers want assurances of high standards of cleanliness and hygiene	New
11.	Better, more holistic data management platforms are helping optimize strategy	New
12.	Air access to a destination is key factor in attracting business travelers	▲3
13.	The destination brand is a more important factor for choosing a destination	▲5
14.	Greater demand for more dynamic outdoor experiences	New
15.	Business event customers looking for better collaboration with destinations to achieve greater business outcomes	▲11
16.	New data management platforms provide 360-degree view of customers and marketplace	New
17.	Geotargeting and localization becoming more prevalent	▼7
18.	Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources.	▼5
19.	Governments approaching tourism from an integrated, multi-departmental perspective focused on economic development	▲2
20.	Risk management now a top priority	New
21.	Venues are making significant investments in hygiene and spacing protocols	New
22.	More communities are aware of importance of tourism to local economy and job growth	▼8
23.	Covid-19 dramatically accelerated e-commerce	New
24.	Governments are more aware of the visitor economy's impact on jobs, tax base and the overall economy	New
25.	Increasing importance of transparency and building partnerships to secure business to a destination	▼13

100 Trends

Change

26.	DMO/CVBs are changing their advocacy approach to sell value of visitor economy more effectively to government	New
27.	Greater focus on equity, diversity and inclusion in the workplace and across the supply chain	New
28.	Greater focus on placemaking to benefit both locals and visitors	New
29.	Disruptions from changing business models, terrorism, pandemics and disasters will increasingly impact how destinations think and act	▲1
30.	Communities expect to be more engaged in the development and management of the destination experience	▼19
31.	Business events increasingly being positioned as catalysts for long-term economic development for communities	▼3
32.	Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts	▼15
33.	Hybrid events will decrease hotel room nights and overall visitor volume	New
34.	Event attendees and participants are increasingly expecting a fully developed hybrid experience	New
35.	Expect more privacy and security protocols to protect online consumers	New
36.	Everyone is focusing on attracting “high value” visitors to increase economic impact	New
37.	Domestic travelers will be a priority market for the foreseeable future	New
38.	Resident sentiment is becoming a key measurement	New
39.	Meeting planners are increasingly booking smaller midsize cities for business events	▼6
40.	Industry-generated taxes increasingly vulnerable to alternative politically based projects	▼5
41.	Meeting planners are asking more for subvention funds	0
42.	Travelers are much more intentional about spending locally and supporting independent businesses	New
43.	Significantly less corporate travel due to mainstream adoption of video conferencing	New
44.	Short-stay trips and mini vacations becoming increasingly popular	▼12
45.	Companies and organizations are redefining their purpose to support broader community benefits	New
46.	Technology makes travel products and services more transparent to the customer	▼24
47.	Combined business and leisure travel becoming more popular	▼16
48.	Evolving awareness of business events as a pipeline for social and economic development	New
49.	Millennial segment takes over the baby boomers influence on the market	▼15

100 Trends

Change

50.	Diminished air routes will have a long-term economic toll for many destinations	New
51.	Greater demand for more diverse drive itineraries	New
52.	Sustainability becoming a mainstream concern for more attendees	New
53.	Mass confusion due to widespread disparities regarding border and trade restrictions	New
54.	Increasing investments in advanced mobility options to support community and economic development	New
55.	Labor and skill shortages increasingly being felt in sectors of the tourism industry	▼16
56.	Reskilling is a priority for all tourism and hospitality industries	New
57.	Community groups are becoming stronger and more influential political advocates	New
58.	Influencer marketing is becoming an increasingly essential component of the destination marketing mix	▼33
59.	Subsidies and incentives being required to attract new air routes/services	▼19
60.	Governments and private sector leaders are collaborating more to develop smarter cities	New
61.	Health passports and/or vaccination certificates will be key to opening international markets	New
62.	Young travelers are more aware of their impact on the communities and environment they visit	▼38
63.	Tourism and hospitality workers are seeking jobs in other sectors	New
64.	Peer-to-peer buyer influence driving customer purchases	▼45
65.	Hub destinations have advantage with better air/drive access	New
66.	Companies and organizations are developing long-term health and safety protocols	New
67.	Shorter meetings will be the rule with shorter booking window	New
68.	Increase of regional point-to-point air routes	New
69.	Esports is growing in popularity as an online, commercialized community platform	New
70.	Increasing social, political and economic problems are damaging destination brands	New
71.	Governments are increasing post-pandemic recovery funding for the tourism industry	New
72.	Mandatory health screening is required to participate in events in person	New
73.	Governments are increasingly developing resilience plans	New
74.	More investment in outdoor destination development to meet growing demand	New
75.	Business event owners are driving demand for smaller regional events	New
76.	Political instability creating a growing threat to destination appeal in certain markets	▼33
77.	Safety and security risks hampering destination decisions	▼35

100 Trends

Change

78.	Governments facing pressure to reduce or eliminate financial subsidies to the tourism sector	▼51
79.	Marketers adapt to Google banning 3rd party cookies	New
80.	Governments are rethinking global supply chains to improve resilience in domestic markets	New
81.	Customers going directly to suppliers for goods and services	▼43
82.	Short-term rentals are having a growing impact on declining long-term workforce housing	▼38
83.	Diminished workforce capacity and lack of training will be a major challenge hampering recovery	New
84.	Government policies creating more restrictions to the flow of travel from country-to-country	▼38
85.	Artificial intelligence will become increasingly important in managing customer relationships	▼40
86.	The market moving towards a shared economy with assets being rented or bartered, outside of traditional commercial arrangements	▼50
87.	Fallout from Covid-19 forcing a surge of consolidation across all industries	New
88.	Hybrid events are providing new opportunities for increasing local business development	New
89.	Shift to remote, work-from-home workforce	New
90.	Greater investment in broadband, especially for rural and marginalized communities	New
91.	More information clutter and noise about destinations occurring in the marketplace	▼68
92.	Short-term rentals are increasingly attracting event attendees and diminishing use of room blocks	▼53
93.	Travelers are shifting from booking multiple short trips to longer visits	New
94.	Health passports will be required for travel	New
95.	Downtown businesses are adapting to loss of corporate offices	New
96.	Professionalism, education and industry certification are gaining importance	New
97.	Resort and rural destinations are attracting a surge of new full and part-time residents	New
98.	Augmented reality will elevate the visitor experiences in the near future	▼50
99.	More communities are increasingly attempting to attract digital nomads to live temporarily in the destination	New
100.	Overtourism is becoming a significant local issue	▼50

80 Strategies

Change

1.	Focus significant attention on content creation and dissemination strategies	▲2
2.	Play more of a central role in advocacy in my destination	0
3.	Enhance engagement with the local community to manage future considerations for the visitor economy	▼2
4.	Build the destination brand around the community's goals, values and creative energy	New
5.	Focus on developing authentic experiences for the customer	▲2
6.	Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume	▲4
7.	Develop a destination master/management plan to define long-term strategy	▲1
8.	Be more involved in economic development initiatives	▲12
9.	Better integrate tourism, economic development and talent attraction	▲2
10.	Invest more effort and resources into video content to market the destination	▼6
11.	Connect visitor experience with the quality of life of residents in my community	▲15
12.	Develop greater capabilities in data management	New
13.	Improve and align data management and digital strategy to optimize marketing ROI	New
14.	Develop strategies to protect what we have while attracting visitation to our community	▲1
15.	Form more strategic alliances outside the visitor industry	▼1
16.	Protect and steward our natural environment and our authentic social and cultural characteristics	▼4
17.	Acquire competencies and skill sets to effectively compete in a disruptive economy	▲5
18.	Put in place digital systems and services to keep pace with customer demand	▲11
19.	Design digital customer engagement primarily around mobile	▼10
20.	Have a greater role in policy and product development	▲7
21.	Diversify revenue sources to maintain/expand current funding levels	▲19
22.	Actively encourage policy makers to reduce barriers to travel	▲21
23.	Agree to uniform methodology with other destination organizations to measure economic impact	▼10
24.	Balance the need for growth with responsible and sustainable development	▼7
25.	Develop a sustainable tourism and events strategic framework	New
26.	Leverage improved data management tools for advocacy and community engagement	New
27.	Increase and prioritize messaging for high-value, mindful visitors who contribute more to our community, economically and otherwise	New

80 Strategies

Change

28. Connect with customers through all stages of their experience	▼12
29. Pay close attention to safety, health and security as a strategic consideration	▲5
30. Participate more in building platforms to improve the visitor experience	▼7
31. Develop visitor messaging to answer demand for transformational/purposeful travel	New
32. Elevate our destination brand by promoting progressive people and organizations invested in sustainability and equality	New
33. Develop outreach programs in the local community to broaden our networks	▼15
34. Increase support for local small businesses and community groups	New
35. Invest in talent to manage/analyze large and complex data for my destination	▼3
36. Take on a greater role as cultural champion of my destination	▲2
37. Place greater emphasis on engaging with customers in two-way conversations, more so than one-directional communication	▼16
38. Emphasize market segmentation that aligns with public/private sector priorities	▼13
39. Use collaborative technology as a core strategy for my destination organization	▲6
40. Expand mandate to broaden our impact and relevance in the community	New
41. Act as conduit to build social networks among our local business community	▼35
42. Improve equity, diversity and inclusion on Board	New
43. Improve equity, diversity and inclusion across organization staff	New
44. Co-develop a strategic framework with public/private partners to improve equity, diversity and inclusion across the industry	▼11
45. Leverage our region's priority economic sectors to generate business events	▼26
46. Adopt operating standards and KPIs with other destination organizations	▼41
47. Support regional and national initiatives to improve mobility and connectivity	New
48. Increase investment in user-generated content platforms	New
49. Take a more active role in political and legislative issues impacting events	▼8
50. Manage content across digital channels on behalf of community stakeholders	▼14
51. Engage in scenario planning to be prepared for future disruptions and opportunities	▼14
52. Adjust roles and expertise to be more consultative engagement/experience managers	New
53. Expand networks and collaboration with health, safety and security organizations to improve our destination's resilience to future shocks	New
54. Lead and support initiatives to address hospitality industry workforce shortages	▲8
55. Develop a much more comprehensive crisis management strategy	New

80 Strategies

Change

56.	Play a greater role in the creation of events to animate the destination	▼6
57.	Create new business development strategies to engage younger visitors	▼29
58.	Expand engagement with educational institutions to support equitable workforce development	New
59.	Invest more effort in scanning markets for business intelligence	▼29
60.	Develop more comprehensive KPIs to improve equity in our organization and ecosystem of vendors	New
61.	Expand how we promote our partner capacities in hybrid events/digital engagement	New
62.	Improve equity in the destination by supporting and promoting a more diverse supply chain of vendors	New
63.	Increase collaboration with local community organizations to address social issues	▼17
64.	Expand engagement with universities, research institutions and advanced/creative industries to better attract high-value business events	New
65.	Redevelop incentive strategies with partners for attracting business events	New
66.	Take a lead role in our community to work with the sharing economy, including participating in discussions on regulatory matters	▼13
67.	Place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination	▼32
68.	Partner with a greater number of competitive destinations	▼19
69.	Work more closely with airlines to build and promote air routes	▼20
70.	Work closely with associations to help them achieve their legacy objectives	▼28
71.	Support growth of hybrid meetings and required services and facilities	New
72.	Have more non-industry experts providing direction for our planning	▼24
73.	Increase advocacy efforts regarding border trade and travel restrictions	New
74.	Restructure organization to better support local business and community groups	New
75.	Hire destination managers, plus those with backgrounds in sales and marketing	▼18
76.	Distribute workforce by adopting a remote working environment	New
77.	Increase involvement in risk assessment/mitigation strategies for business events	▼14
78.	Develop specific initiatives to attract professional remote workers	New
79.	Consider shared services (e.g. joint office space, accounting services, co-op marketing and brand development)	New
80.	Consider mergers with other organizations (e.g. economic development, municipal departments, chamber of commerce, other associations)	New

Strategies by Region

	North America	Asia	Australia	Europe	Latin America	Middle East/Africa
1. Focus significant attention on content creation and dissemination strategies	1	3	3	14	19	18
2. Play more of a central role in advocacy in my destination	3	7	12	19	6	18
3. Enhance engagement with the local community to manage future considerations for the visitor economy	2	7	45	23	31	7
4. Build the destination brand around the community's goals, values and creative energy	4	2	23	5	13	41
5. Focus on developing authentic experiences for the customer	7	16	12	2	5	12
6. Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume	9	1	20	13	7	12
7. Develop a destination master/management plan to define long-term destination development	10	12	23	10	14	1
8. Be more involved in economic development initiatives	8	44	23	40	10	12
9. Invest more effort and resources into video content to market the destination	5	34	3	47	53	33
10. Better integrate tourism, economic development and talent attraction	12	25	23	10	16	1
11. Connect visitor experience with the quality of life of residents in my community	6	51	77	31	50	18
12. Develop greater capabilities in data management and digital experience strategy	14	18	23	35	11	18
13. Improve and align data management and digital strategy to optimize marketing ROI	11	37	7	57	56	18
14. Develop strategies to protect what we have while attracting events and visitation to our community	16	30	8	24	15	18
15. Form more strategic alliances outside the visitor industry	15	22	45	18	27	18
16. Protect and steward our natural environment and our authentic social and cultural characteristics	17	50	12	4	22	33
17. Acquire competencies and skill sets to effectively compete in a disruptive economy	21	23	38	36	18	12
18. Put in place digital systems and services to keep pace with customer demand	24	4	12	14	26	33
19. Design digital customer engagement primarily around mobile	13	48	23	62	49	52
20. Have a greater role in policy and product development	19	44	41	22	38	41
21. Diversify revenue sources to maintain/expand funding levels	22	33	1	29	29	18
22. Actively encourage policy makers to reduce barriers to travel	18	71	8	27	37	33
23. Agree to a uniform methodology with other destination organizations to measure economic impact	25	13	38	32	20	65
24. Balance the need for growth with responsible and sustainable development	37	11	12	6	2	33
25. Develop a sustainable tourism/events strategic framework	36	6	23	2	9	38

Strategies by Age

	18-34	35-49	50-64	Over 65
1. Focus significant attention on content creation and dissemination strategies	7	2	1	8
2. Play more of a central role in advocacy in my destination	3	1	2	10
3. Enhance engagement with the local community to manage future considerations for the visitor economy	5	3	4	3
4. Build the destination brand around the community's goals, values and creative energy	3	4	5	14
5. Focus on developing authentic experiences for the customer	9	6	3	19
6. Develop new KPIs to better measure the economic and social impact of tourism and business events beyond visitor volume	1	5	7	3
7. Develop a destination master/management plan to define long-term destination development	15	8	8	9
8. Be more involved in economic development initiatives	11	7	9	31
9. Better integrate tourism, economic development and talent attraction	2	10	10	35
10. Invest more effort and resources into video content to market the destination	28	12	6	2
11. Connect visitor experience with the quality of life of residents in my community	44	9	11	35
12. Develop greater capabilities in data management/digital experience strategy	8	14	16	22
13. Improve/align data management and digital strategy to optimize marketing ROI	52	16	12	1
14. Develop strategies to protect what we have while attracting events and visitation to our community	9	11	19	18
15. Form more strategic alliances outside the visitor industry	26	17	14	28
16. Protect and steward our natural environment and our authentic social and cultural characteristics	20	13	20	22
17. Acquire competencies to effectively compete in a disruptive economy	12	30	13	40
18. Put in place digital systems and services to keep pace with customer demand	28	25	17	22
19. Design digital customer engagement primarily around mobile	44	23	18	35
20. Have a greater role in policy and product development	25	19	21	19
21. Diversify revenue sources to maintain/expand current funding levels	14	20	25	3
22. Actively encourage policy makers to reduce barriers to travel	20	41	15	34
23. Agree to a uniform methodology with other destination organizations to measure economic impact	6	24	23	12
24. Balance the need for growth with responsible and sustainable development	17	15	29	28
25. Develop a sustainable tourism and events strategic framework	23	18	30	28

Global Advisory Group

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

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Advisory Panels

The MMGY NextFactor project team interviewed government, tourism, community and non-industry leaders in 6 Advisory Panels to identify global consumer trends and define how destination organizations are optimizing strategies on the road to recovery.

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Synergy

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Zartico

Dan Holowack

Crowdriff

Taylor McGurk

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Steven Paganelli

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Allied Esports

Peter Lukomskyj

Lyft

Jim Pattison

The Jim Pattison Group

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Angie Welling

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Bureau Comodoro
Ente Comodoro Turismo
ENTUR
INPROTUR
Medoza Convention & Visitors Bureau
Radio de Viaje
Rio Cuarto Bureau

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Adelaide Convention Bureau
Adelaide Convention Centre
Arinex
BESydney
Brisbane EDA
Destination Gold Coast
Melbourne Convention Bureau
Tourism Tropical North Queensland

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Austria Center Vienna
Convention Bureau Tirol

Bermuda

Bermuda Tourism Authority

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Brasilia and Region Convention & Visitors Bureau
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LCB Consultoria
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Recife Convention
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Salvador Destination
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ATPI Canada
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Banff Jasper Collection by Pursuit
Banff & Lake Louise Tourism
Blue mountain village association
Ceremony Travel
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Destination BC
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Destination Cape Breton
Destination Greater Victoria
Destination St. John's
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 Frontiers North Adventures
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 Kadima Village
 Marriott International
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 MCC Destination Management
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 Niagara Parks Commission
 NWT Conference Bureau
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 Ottawa Valley Tourist Association
 Parksville Qualicum Beach Tourism Assoc.
 Peachland Visitor Centre
 Pinnacle Hotel Harbourfront
 RBC Place London
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 Rocky Mountaineer
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Tourism Hamilton
 Tourism Jasper
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 Tourism Tofino
 Tourism Vancouver
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 Tourism Windsor Essex Pelee Island
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Buró de Convenciones de Guatemala
CentraRSE
Guatemala Tourism Board
Independiente
Organizacion, S.A.
Porta Hotels
Prueba
Universidad del Valle de Guatemala

Survey Participants

Honduras

Buro de Convenciones de San Pedro Sula
Eventia

Ireland

Dublin Convention Bureau

Israel

ORTRA Ltd.

Italy

Convention Bureau Italia
Destination Florence CVB
Kassiopea Group srl

Japan

Milano & Partners - Yes Milano Convention Bureau
Sora / Michi / Minato
Abashiri City Tourist Association
Discover EAST-Hiroshima tourism Authority
Hokkaido Tourism Organization
Japan Convention Services, Inc.
Japan Tourism Agency
JAPAN TRAVEL AND TOURISM ASSOCIATION
JTB Communication Design, Inc.
Kitakyushu Convention Bureau
Kobe Convention Bureau
OkinawaCityTourism&Products Association
Sado Tourism Association
Saitama Prefecture Products & Tourism Association
Sapporo Convention Bureau
Sendai Convention Bureau
Tokyo Convention & Visitors Bureau
Toyama Convention Bureau
Yokohama Convention & Visitors Bureau

Malaysia

Business Events Sarawak - BESarawak
Kuala Lumpur Convention Centre

Mexico

ALL TOGETHER
AMIR
Asociación de hoteles
Cancun Center
Centro de Convenciones y Exposiciones de la Isla San Marco
Clúster de Turismo Monterrey
Consejo De Promocion Turistica de Quintana Roo
Consejo Turístico de San Miguel de Allende, Gto
Convenciones y Parques Puebla
Dirección de congresos y convenciones Durango
DMC MTY
Fideicomiso Turismo Nuevo Leon
FIDETUR San Luis Potosi
Gobierno del municipio de León, Gto., México
Hotel Mision Torreon
Incentitours
Museo del Juguete Tradicional Mexicano
OCV Hermosillo
OCV Leon
OCV Monterrey
OCV SALTILLO
OCV TAM
Oficina de Convenciones y Visitantes de Culiacán
Oficina de Convenciones y Visitantes de Torreón
Oficina de Turismo de Reuniones de Queretaro
Reed Exhibitions
San Pedro Garza García
Secretaría de Turismo de Guanajuato
Secretaría de Turismo de México

Survey Participants

Secretaría de Turismo del Estado de Aguascalientes
Secretaría de Turismo del Estado de Jalisco
Secretaria de Turismo y Desarrollo
de Pueblos Mágicos
SECTUR
Secturz
SIFO
STA Consultores
Turismo Nuevo León
UANL
UDLAP
Valtak Experiences
Viantura
Visita Felice Holistic Health Mexico
Y Vete de Viajes

The Netherlands

THCB

Nicaragua

Secretaria de Integración Turística Centroamericana

Oman

Oman Convention & Exhibition Centre

Panama

PROMTUR Panamá

Paraguay

Hotel Villa Morra Suites

Peru

C&C Arte y Publicidad SAC
Independiente
Lima Convention Bureau
PROMPERÚ

Poland

Visit Wroclaw

Russia

Saint Petersburg Convention Bureau

Singapore

Singapore Tourism board

Slovenia

Ljubljana Tourism

South Africa

Cape Town Tourism

South Korea

Daegu Convention & Visitors Bureau
Goyang CVB

Spain

Barcelona Convention Bureau
Turisme de Barcelona

Sweden

Visit Lund AB - Lund Convention Bureau

Switzerland

Bern Convention Bureau
CCM SA
Zürich Tourismus

Taiwan

GIS Group Global
TAITRA (MEET TAIWAN)

Survey Participants

Thailand

Thailand Convention & Exhibition Bureau

United Arab Emirates

Dubai Tourism

United Kingdom

Dundee & Angus Convention Bureau

Glasgow Convention Bureau

London and Partners

Meet Bristol & Bath

Meet In Cardiff

NEWCASTLEGATESHEAD CONVENTION BUREAU

Travel Foundation

United States

Airstream Ventures

Albert Lea Convention & Visitors Bureau

Allegheny National Forest Visitors Bureau

Allen Texas CVB

Alvin Convention & Visitors Bureau

Anderson Madison County Visitors Bureau

Ann Arbor Sports Commission

Arizona Office of Tourism

Arlington CVB

Aspen Chamber Resort Association

ATL Airport District CVB

Aurora Area Convention & Visitors Bureau

Austin Sports Commission

Baraga County Convention & Visitor Bureau

Bayfield Chamber & Visitor Bureau

Beaver County Tourism

Beverly Hills Conference & Visitors Bureau

Birch Run Area CVB

Bloomington MN CVB

Bluegrass Music Hall of Fame & Museum

Breckenridge Tourism Office

Buffalo Sports Commission

Burnsville Convention & Visitors Bureau

Butler County Visitors Bureau

Cabarrus County Convention and Visitors Bureau

Calhoun County Visitors Bureau

Carson Valley Visitors Authority

Catch Des Moines

Cedar Rapids Tourism Office

Chattanooga Tourism Co.

Cheboygan Area Visitors Bureau

City of Loveland

City Of Pismo Beach

City of Temple

Clear Lake Area Chamber of Commerce

Coastal Mississippi

Coldwater Country Conference & Visitors Bureau

Columbia Convention and Visitors Bureau

Council Bluffs CVB

Dayton Convention and Visitors Bureau

Destination Ann Arbor

Destination Bryan

Destination Cleveland

Destination DC

Destination Door County

Destination El Paso

Destination Gettysburg

Destination Irvine

Destination Madison

Destination Missoula - Missoula CVB

Destination Niagara USA

Destination North Myrtle Beach

Detroit Metro Convention & Visitors Bureau

Discover Denton

Survey Participants

Discover Dupage	Greater Bangor CVB
Discover Durham	Greater Beaufort-Port Royal CVB
Discover Kalamazoo	Greater Birmingham CVB
Discover Kodiak	Greater Boston CVB
Discover Lehigh Valley	Greater Burlington CVB
Discover Monroe-West Monroe	Greater Fort Lauderdale CVB
Discover Peoria	Greater Green Bay Convention & Visitors Bureau
Discover Puerto Rico	Greater Lansing Convention & Visitors Bureau
Discover The Palm Beaches	Greater Metropolis Convention & Visitors Bureau, Inc.
Dutchess Tourism, Inc.	Greater Miami Convention & Visitors Bureau
Elizabeth Destination Marketing Organization	Greater Orlando Sports Commission
Elkhart County IN CVB	Greater Palm Springs CVB
Elkhart Lake Tourism	Greater Raleigh Convention and Visitors Bureau
Experience Columbia	Greater Wilmington Convention & Visitors Bureau
Experience Columbus	Greene County Tourist Promotion Agency
Experience Florida's Sports Coast	Gulf Shores & Orange Beach Tourism
Experience Grand Rapids	Haines Borough
Experience Kissimmee	Hamilton County Tourism, Inc.
Experience Olympia & Beyond	Hawaii Tourism Authority
Experience Scottsdale	Hayward Lakes VCB
Explore Branson	Heber Valley Tourism and Economic Development
Explore Brookhaven	Heritage Corridor CVB
Explore Charleston	Hocking Hills Tourism Association
Explore Licking County	Houston First Corporation
Explore Lincoln City	Hudson Area Chamber of Commerce & Tourism Board
Explore Minnesota	Huntingdon County Visitors Bureau
Explore Utah Valley	Indiana Dunes Tourism
Explore York	International Falls, Ranier and Rainy Lake CVB
Fargo-Moorhead CVB	Iron Range Tourism Bureau
Farmington CVB	Irving Convention & Visitorsw Bureau
Festival Country Indiana	Jackson Chamber of Commerec
Finger Lakes Visitors Connection	Jackson County TDA
Fox Cities Convention & Visitors Bureau	JAF TRAVEL
Galena Country Tourism	Johnston County Tourism Authority
Glacier Country Tourism	Kentucky Dept. of Fish and Wildlife Resources
Great Lakes Bay Regional CVB	Kentucky Lake Convention & Visitors Bureau

Survey Participants

Keweenaw Convention & Visitors Bureau	Northern Kentucky CVB
Kingman Office of Tourism	Ohio County Tourism, INC.
Lackawanna County Visitors Bureau	Ohio Travel Association
LaGrange County Convention & Visitors Bureau	Oklahoma City CVB
Leavenworth Convention & Visitors Bureau	Oneida County Tourism
Lee County VCB	Paducah Convention & Visitors Bureau
Leech Lake Area Chamber of Commerce	Palm Coast and the Flagler Beaches
Little Rock CVB	Park City Chamber of Commerce CVB
Livingston County CVB	Pierce County Economic Development Department
Loudoun Sports Tourism	Placer Valley Tourism
Louisiana Office of Tourism	Pleasant Prairie Convention & Visitors Bureau
Louisville Tourism	Providence Warwick Convention & Visitors Bureau
Mackinac Island Tourism	Pulaski County Tourism Bureau
Maine Office of Tourism	Rancho Cordova Travel & Tourism
Manistee County Visitors Bureau	Redding CVB
Martin County Office of Tourism	Reno-Sparks Convention & Visitors Authority
Maryland's Sports Commission	Richmond Region Tourism
Meet Chicago Northwest	Rockford Area CVB
Meet Minneapolis	San Angelo Convention & Visitors Bureau
MeetPITTSBURGH	San Juan Islands Visitors Bureau
Memphis Tourism	Saugatuck Douglas Area CVB
Minneapolis Northwest Tourism	Sault Area CVB
Monterey County CVB	Sedona Chamber of Commerce & Tourism Bureau
Montgomery County VA Regional Tourism	Shelly Green, LLC
Mt. Pleasant Area CVB	Shreveport-Bossier Convention & Tourist Bureau
Municipality of Skagway Visitor Department	Silver Lake Sand Dunes-Hart Visitor Bureau
Myrtle Beach Convention & Visitors Bureau	Sisters Area Chamber of Commerce
Myrtle Beach Regional EDC	Snowmass Tourism
Naples, Marco Island, Everglades CVB	SolIN Tourism
Nashville Convention & Visitors Corp	Somerset- Pulaski Co CVB
Nebraska Tourism	South Haven/Van Buren County CVB
New Orleans & Co	Southern Delaware Tourism
New Smyrna Beach Area Visitors Bureau	Springfield Convention & Visitors Bureau
North Little Rock CVB	St. Augustine, Ponte Vedra & The Beaches VCB
North Myrtle Beach Chamber Foundation	The Beaches of Fort Myers & Sanibel

Survey Participants

The Happy Valley Adventure Bureau	Visit Colorado Springs
Think Iowa City	Visit Concord
Tillamook Coast Visitors Association	Visit Cook County
TourismOhio	Visit Corpus Christi
Tourist Development Palm Beach County Florida	Visit Corvallis
Travel Costa Mesa	Visit Denver
Travel Lane County	Visit Dublin Ohio
Travel Marquette	Visit Duluth
Travel Michigan/ MEDC	Visit Durango
Travel Oregon	Visit Evansville
Travel Portland	Visit Fairfax
Travelander	Visit Finland
Traverse City Tourism	VISIT FLORIDA
Trumbull County Tourism	Visit Fort Worth
Tulsa Regional Tulsa	Visit Fresno County
Tunica Convention & Visitors Bureau	Visit Grand Junction
Tupelo Convention and Visitors Bureau	Visit Greater Grand Forks
Vail Valley Partnership	Visit Grove City
Virginia Beach CVB/Sports Marketing	Visit Houston
Visit Albuquerque	Visit Indy
Visit Anaheim	Visit KC
Visit Anchorage	Visit Kenosha
Visit Aurora	Visit Lafayette - West Lafayette
Visit Baltimore, Inc.	Visit Laguna Beach
Visit Bastrop	Visit Lake Charles
Visit Baton Rouge	Visit Lake County
Visit Bellingham	Visit Lauderdale
Visit Beloit	Visit Lenawee, Inc
Visit Billings	Visit Luzerne County
Visit Bloomington	Visit Marshall
Visit Buffalo Niagara	Visit Maryland Heights
Visit Carlsbad	Visit Mesa
Visit Casper	VISIT Milwaukee
Visit Champaign County	Visit Mobile
Visit Charlevoix	Visit Muskegon
Visit Cheyenne	Visit Myrtle Beach

Survey Participants

Visit Oceanside
Visit Ogden
Visit Omaha
Visit Orlando
Visit Overland Park
Visit Oxford
Visit Panama City Beach
Visit Pensacola
Visit Philadelphia
Visit Phoenix
Visit Placer
Visit Plano
Visit Quad Cities
Visit Rochester
Visit Rochester
Visit Rogers
Visit Roseville
Visit Sacramento
Visit Salt Lake
Visit San Antonio
Visit Santa Rosa
Visit Sarasota County
Visit Sebring
Visit South Bend Mishawaka
Visit Spokane
Visit Springfield
Visit St. Pete/Clearwater
Visit Stillwater
Visit Stockton
Visit Sun Valley
Visit Tampa Bay
Visit Temecula Valley
Visit Tri-Cities
Visit Tucson
Visit Tuolumne County

Visit Vacaville
Visit Vicksburg
Visit Virginia's Blue Ridge
Visit West Hollywood
Visit Wichita
Visit Yosemite | Madera County
VisitColumbusGa
VisitDallas
VisitNorfolk
VisitNorman
Washington County Visitors Association
WESTERN STATE BANK EXPO CENT
Wilmington and Beaches CVB
Wrangell Convention and Visitor Bureau
Yolo County Visitors Bureau

Uruguay

Grupo Elis Meetings Management

DESTINATION **N**→**E****X****T**

