



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



DESTINATION  
**NEXT**



DESTINATIONS  
INTERNATIONAL



NextFactor



## Futures Study

Overview of trends and strategies for destination organizations worldwide

Previous studies in 2014, 2017, 2019 & 2021

Input from over 830 participants in 62 countries



## Scenario Model

Detailed assessment of destination strength and alignment

Updated DNEXT model in 2021

375 destination assessments in 12 countries

# 2023 Futures Study

# Global Advisory Group



## South/Central America & Caribbean

**Jacqueline Mora**  
**Alejandra Zúñiga**  
**David Hidalgo**  
**Fernando Fondevila**  
**Gilberto Salcedo**  
**Gustavo Stauffer**  
**Julián Franco**  
**María José Abuabara**  
**Mauricio Magdaleno**  
**Nancy Mejia**  
**Reizel Vilorio**  
**Silvana Biagiotti**  
**Toni Sando**  
**Vaniza Schuler**

**Ministry of Tourism (MITUR), Dominican Republic (Vice Minister)**  
CEO, Visit Puerto Varas CVB, Chile  
President, Sinergize Meetings  
CEO, Promtur Panama, Panama  
Vice Minister, Tourism, ProColombia, Colombia  
CEO, Guadalajara CVB, Mexico  
Secretary of Tourism, Valle del Cauca State, Cali, Colombia  
Executive Director of Tourism, USA, ProColombia  
Managing Director, Clúster de Turismo de Nuevo León, Mexico  
Managing Director, National Chamber of Tourism Guatemala, Guatemala  
Vice Minister, Instituto Hondureño de Turismo, Honduras  
Chairman of the Board, Latin America Association of CVBs, Latam  
CEO, Sao Paulo CVB, President, UNEDESTINOS (Brazilian Assn of CVBS), Brasil  
Director, Business Events, EMBRATUR, Brasil



## Canada

**Scott Beck**  
**Chantal Sturk-Nadeau**  
**Leslie Bruce**  
**Michael Crockett**  
**Paul Nursey**  
**Ross Jefferson**  
**Royce Chwin**  
**Stephanie Clovechok**  
**Yves Lalumiere**

**Destination Toronto**  
Destination Canada Business Events  
Banff & Lake Louise Tourism  
Ottawa Tourism  
Destination Greater Victoria  
Discover Halifax  
Destination Vancouver  
Tourism Saskatoon  
Tourisme Montreal



## Asia Pacific

**Dr. Edward Koh**  
**Lyn Lewis-Smith**  
**Amelia Roziman**  
**Julia Swanson**  
**Karen Bolinger**  
**Leonie Ashford**  
**Shin Osuka**

**Singapore Tourism Board**  
**BeSydney**  
Business Events Sarawak (Malaysia)  
Melbourne Convention Bureau  
Gold Coast CVB  
Tourism New Zealand Business Events  
Japan Travel & Tourism Association



## USA

**Chris Thompson**  
**Brad Dean**  
**Casandra Matej**  
**Craig Davis**  
**Dave Lorenz**  
**Gina Trigila**  
**Jeff Miller**  
**Jill Delaney**  
**Jennifer Chun**  
**Leonard Hoops**  
**Martha Sheridan**  
**Melyssa Reeves**  
**Sara Toliver**  
**Victoria Isley**

**Brand USA**  
Discover Puerto Rico  
Visit Orlando  
Visit Dallas  
Pure Michigan  
Los Angeles Tourism  
Travel Portland  
Discover Albany  
Hawaii Tourism  
Visit Indy  
Greater Boston CVB  
Vacaville  
Visit Ogden  
Asheville CVB



## Europe, Middle East, Africa

**Bettina Reventlow-Mourie**  
**Caroline Strand**  
**Corne Koch**  
**Jos Vranken**  
**Matthias Schultz**  
**Miha Kovačić**  
**Nelly Mukazayire**  
**Noa Sapir**  
**Paul Kelly**  
**Paul Mockler**  
**Peter de Wilde**

**Wonderful Copenhagen**  
Visit Stockholm  
Capetown DMO  
Holland Tourism  
German Convention Bureau  
Slovenian Convention Bureau  
Rawanda Convention Bureau  
Tel Aviv Convention Bureau  
Fáilte Ireland  
Fáilte Ireland  
VisitFlanders

**Petra Stusek**  
**Rory Archibald**  
**Sam Johnston**  
**Simone McCaugherty**  
**Yrjötapio Kivisaari**  
**Kathryn Davis**  
**Patricia Yates**

Ljubljana, Slovenia  
VisitScotland  
Convention Bureau of Ireland  
London & Partners  
Visit Oulu  
Visit West (Bristol & Bath, UK)  
Visit Britain / Visit England

# 4 Global Advisory Panels



**Disruptors**



**Customers**



**Industry**



**Community**



**50**  
TRENDS



**50**  
STRATEGIES



# Top Trends



- 1 **+84** Artificial intelligence will become increasingly prevalent at an accelerated pace
- 2 **-** Customers are increasingly seeking a unique, authentic travel experience
- 3 **+27** Communities expect to be more engaged in destination, product and experience development for locals and visitors
- 4 **+28** Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts
- 5 **-4** Greater industry, community and government alignment is driving destination competitiveness and brand
- 6 **+32** Resident sentiment is becoming a key measurement
- 7 **+48** Labor and skill shortages are increasingly being felt in sectors of the tourism industry
- 8 **+20** There's a greater focus on placemaking to benefit both locals and visitors
- 9 **+17** DMO/CVBs are increasing advocacy to communicate value of visitor economy to government
- 10 **+6** New data management platforms provide a 360-degree view of visitors and destination to help optimize strategy
- 11 **-8** Content creation and dissemination by the public and stakeholders across all platforms drives the destination brand and experience
- 12 **+6** Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources
- 13 **-7** Travelers are seeking more personal enrichment and wellbeing
- 14 **-10** Short-form video becomes the new currency of destination marketing and storytelling
- 15 **+12** There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain

1

Artificial intelligence will become increasingly prevalent at an accelerated pace

2

Customers are increasingly seeking a unique, authentic travel experience

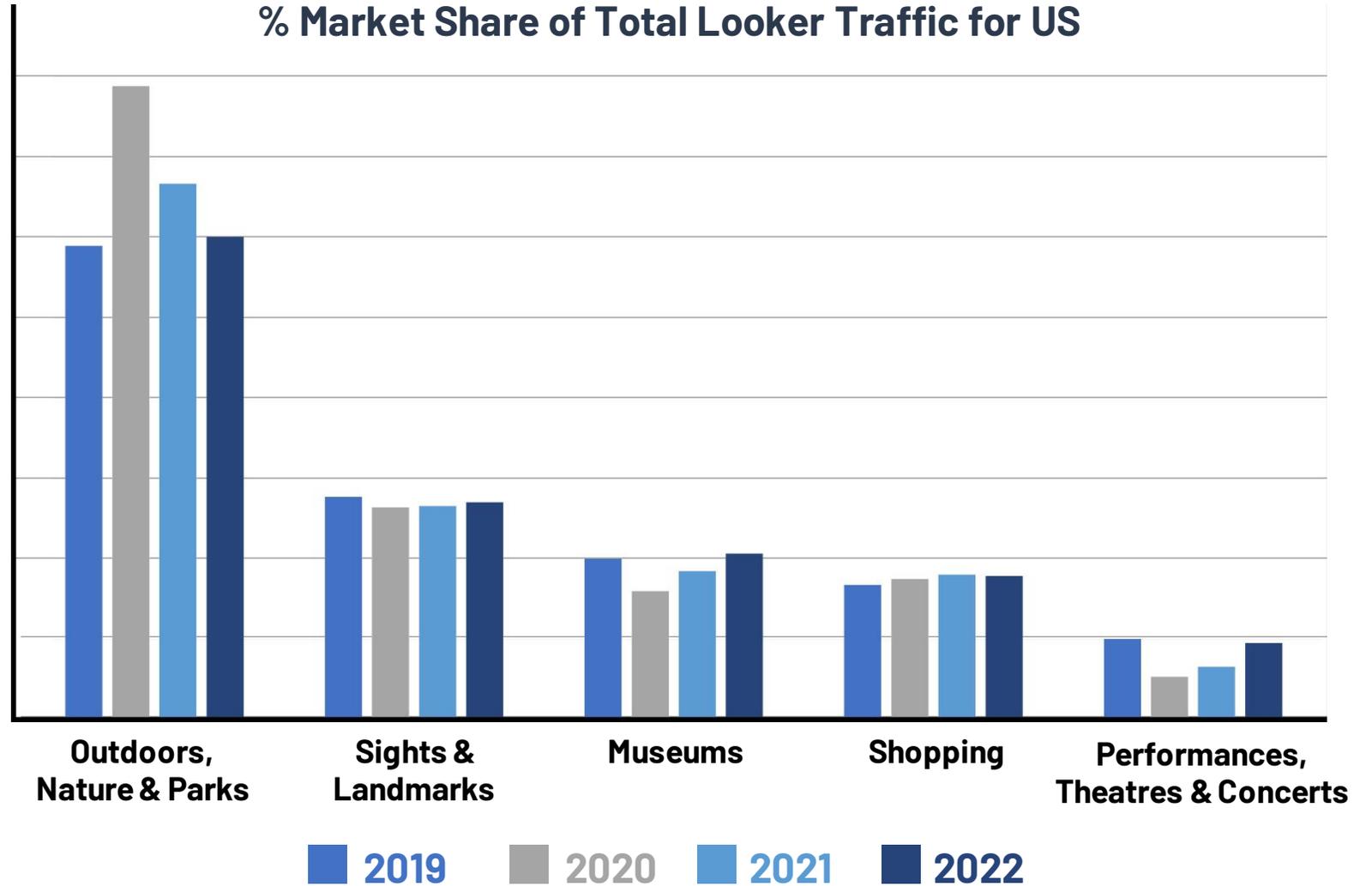
# Experience NEXT

 **Tripadvisor**

+

 **NextFactor**

### % Market Share of Total Looker Traffic for US



4

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

5

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

# Top Strategies



- 1 **NEW** Protect revenue sources to maintain current funding levels
- 2 **+3** Focus on developing authentic experiences for the customer
- 3 **+6** Better integrate tourism and economic development
- 4 **-** Build the destination brand around the community's goals, values and creative energy
- 5 **+15** Have a greater role in destination and product development
- 6 **+1** Develop a destination master/management plan to define long-term strategy
- 7 **+5** Increase capabilities in data management for business intelligence, marketing and community engagement
- 8 **-7** Focus significant attention on content creation and dissemination
- 9 **NEW** Develop a data-driven plan for a more sustainable visitor economy
- 10 **+1** Align the visitor experience and quality of life for residents in my community
- 11 **NEW** Increase our organization's knowledge of innovative technologies
- 12 **NEW** Increase efforts to attract and retain our organization's talent
- 13 **NEW** Increase support with local government leadership to influence policy
- 14 **+42** Develop and support new events in the destination
- 15 **NEW** Improve local resident sentiment to increase support for the visitor economy

1

Protect revenue sources to maintain current funding levels

7

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

11

Increase our organization's knowledge of innovative technologies

12

Increase efforts to attract & retain our organization's talent

2

Focus on developing authentic experiences for the customer

5

Have a greater role in destination & product development

6

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

9

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

10

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

14

Develop & support new events in the destination

4

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

8

Focus attention on content creation and dissemination

# Roles & KPIs



Organization Role	Current
Destination marketing	1
Community relations and partnership	2
Brand management	3
Destination information resource	4
Data research and business intelligence	5
Destination and product development	6
Industry advocate	7
Government relations and policy development	8
Visitor services	9
Meetings and conventions sales	10
Broader economic development	11
Leisure sales	12
Equity, Diversity, Inclusion leadership	13
Environmental stewardship	14
Sports tourism development and promotion	15
Major event partner and developer	16
Workforce development	17
Crisis management and emergency preparedness	18

Organization Role	Current	Future
Destination marketing	1	1
Community relations and partnership	2	5
Brand management	3	3
Destination information resource	4	6
<b>Data research and business intelligence</b>	5	2 
<b>Destination and product development</b>	6	4 
Industry advocate	7	8
Government relations and policy development	8	7
Visitor services	9	11
Meetings and conventions sales	10	10
Broader economic development	11	9
Leisure sales	12	12
Equity, Diversity, Inclusion leadership	13	14
Environmental stewardship	14	13
Sports tourism development and promotion	15	16
Major event partner and developer	16	17
Workforce development	17	15
Crisis management and emergency preparedness	18	19

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

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

# Mandate Map



# DMO Mandate

---



## DMO Mandate

---

### DEMAND



**Visitor**  
Engagement

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

## DMO Mandate

---

### DEMAND

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



**Partner**  
Support

# DMO Mandate

---



## Destination Development

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

**SUPPLY**

## DMO Mandate

---

- Government Relations & Advocacy
- Sustainability
- Equity, Diversity, Inclusion & Belonging
- Economic & Workforce Development
- Resident Engagement & Support



**Community**  
Alignment

**SUPPLY**

# DMO of the Future





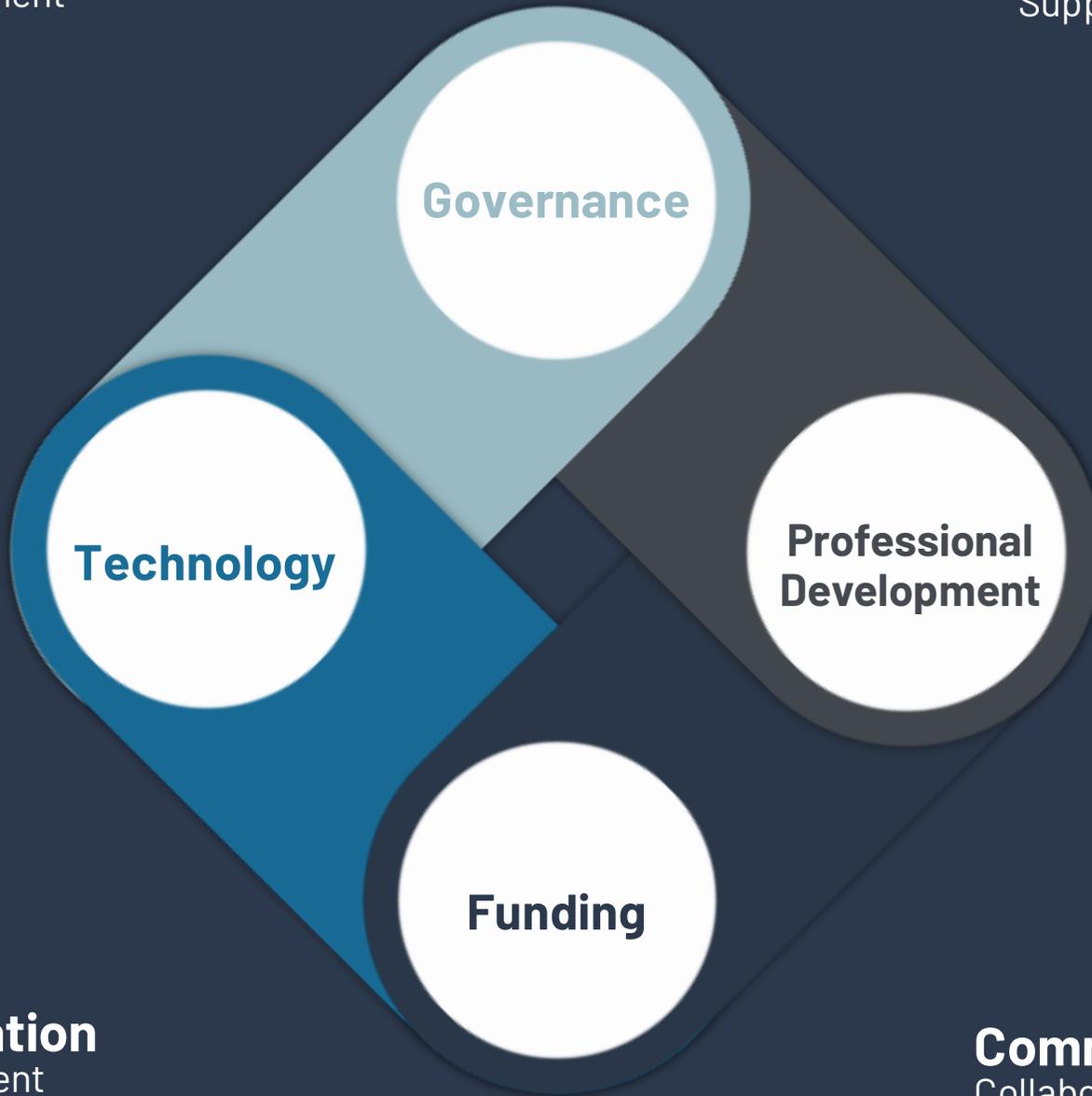
**Visitor**  
Engagement

**Partner**  
Support



# The DMO of the Future

---



**Destination**  
Development

**Community**  
Collaboration



# Thank You!

**Cassandra McAuley**  
[cmcauley@nextfactorinc.com](mailto:cmcauley@nextfactorinc.com)

