The background of the slide features a panoramic night view of a city, likely Vancouver, with its lights reflecting on the water. Overlaid on this image is a complex network of glowing blue lines and dots, symbolizing digital connectivity and technology. A solid orange vertical bar is positioned to the right of the title text.

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



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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
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Wonderful Copenhagen

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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



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



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

4 Global Advisory Panels

A close-up photograph of hands typing on a laptop keyboard, overlaid with a blue tint.

Disruptors

A photograph of several business professionals in a meeting, gathered around a table with laptops and documents, overlaid with a blue tint.

Customers

A photograph of a restaurant interior with several wine glasses on a table, overlaid with a blue tint.

Industry

A photograph of a large, classical building with a prominent portico and columns, overlaid with a blue tint.

Community

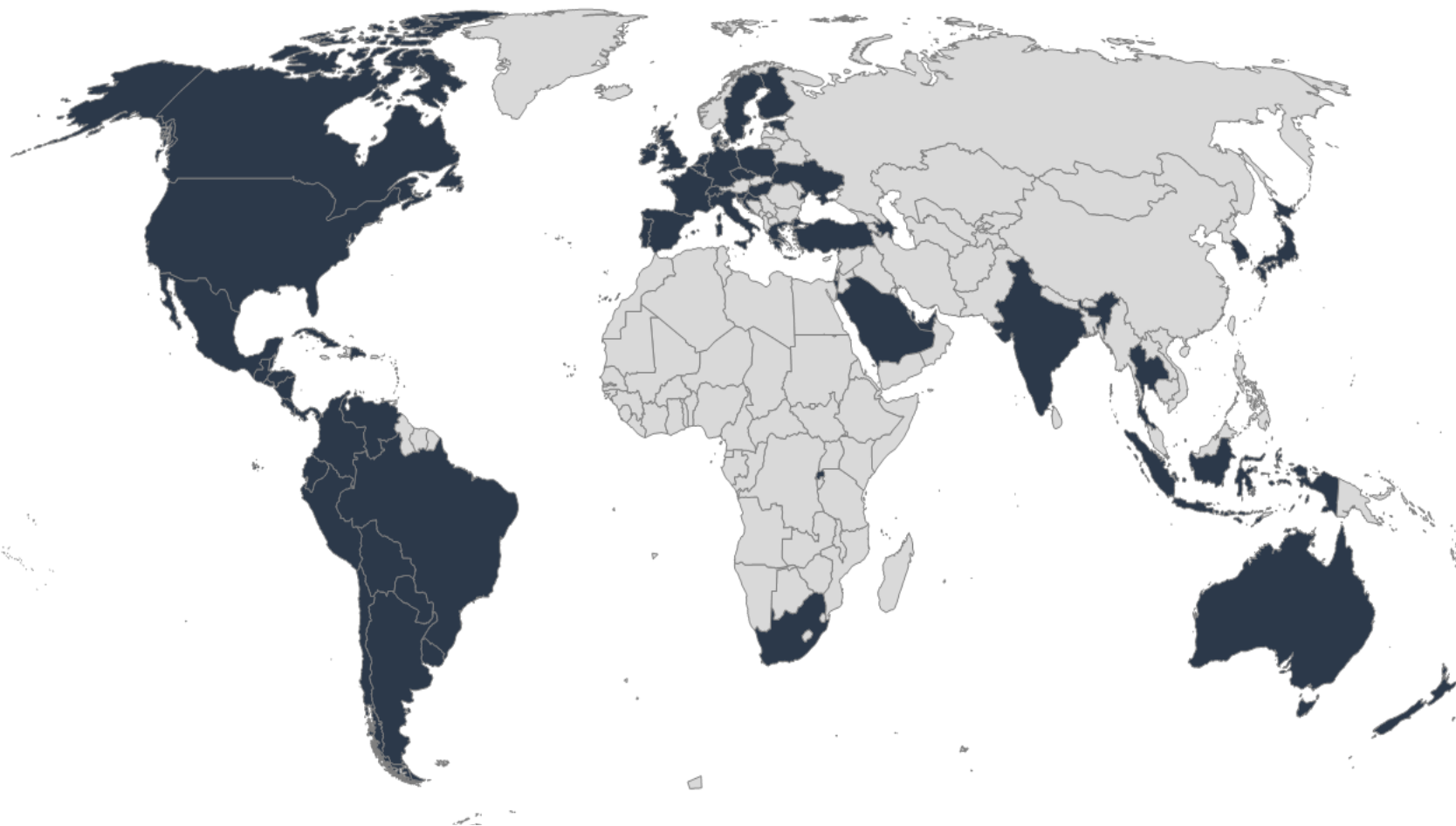


50
TRENDS



50
STRATEGIES

2023 Survey



**Survey
Participants**

837

PARTICIPANTS

62

COUNTRIES

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

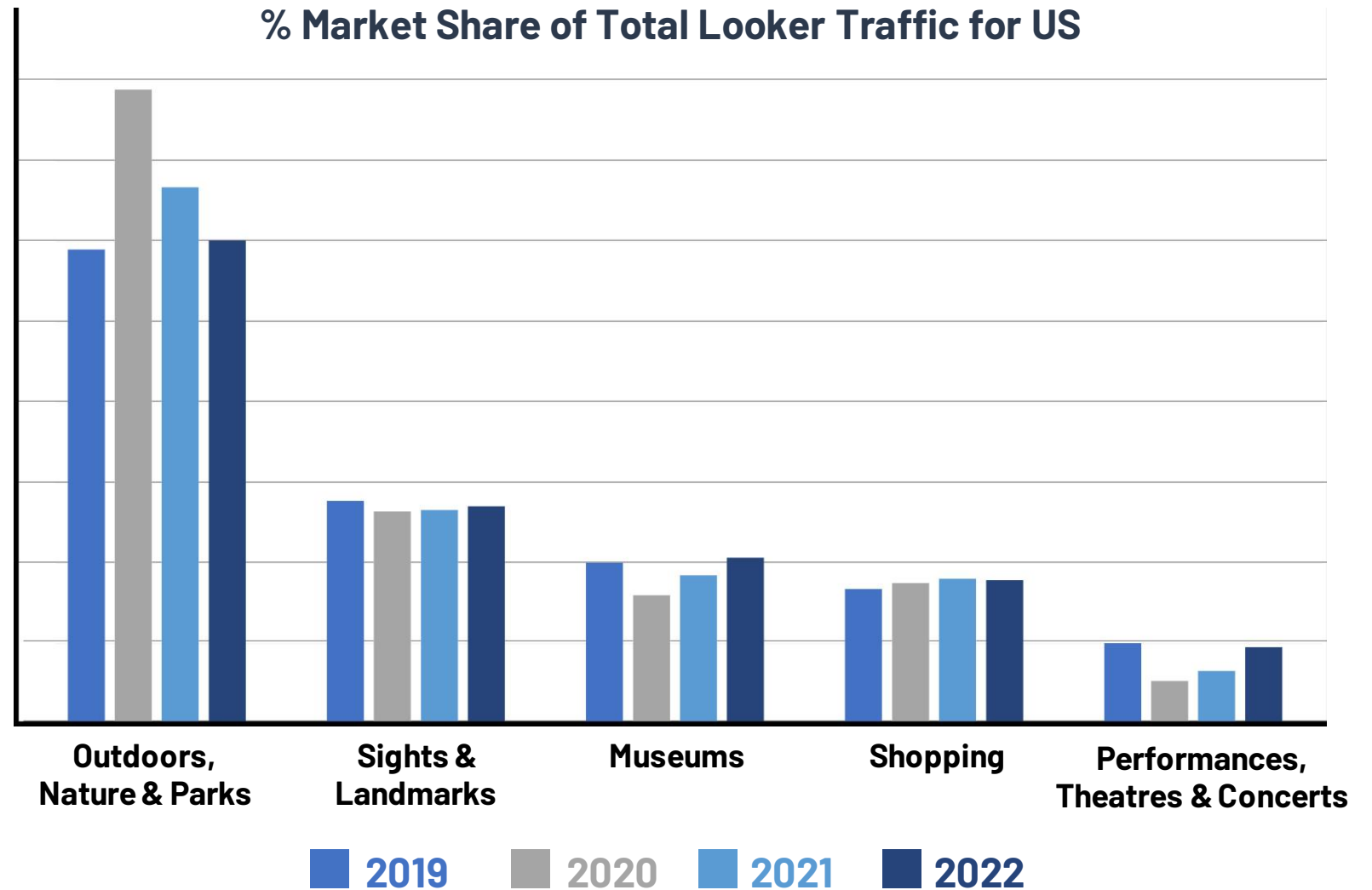
2

Customers are increasingly seeking a unique, authentic travel experience

Experience NEXT



+



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
Data research and business intelligence	5	2 ↑
Destination and product development	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
Visitor satisfaction	6	2 
Marketing ROI	7	4 
Member/partner satisfaction	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
Resident sentiment	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



The DMO of the Future



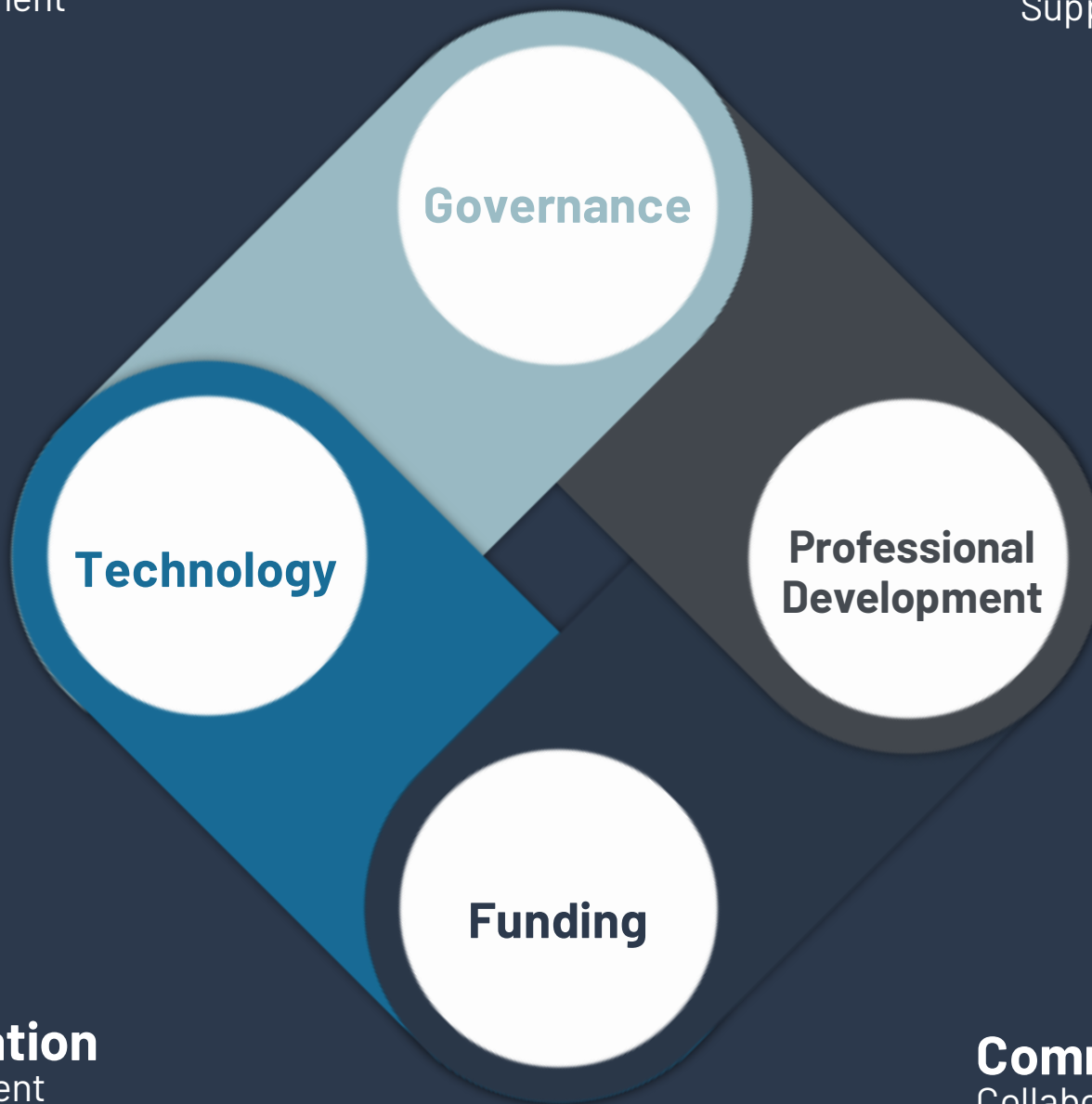
Visitor
Engagement

Partner
Support



Destination
Development

Community
Collaboration



Thank You!

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