

A nighttime cityscape with a digital network overlay of glowing blue lines and nodes. The city lights are reflected in a body of water in the foreground. An orange vertical bar is positioned to the right of the text.

Looking to the Future: The 2023 Destinations International Futures Study, Prepared by MMGY NextFactor



DESTINATION
NEXT

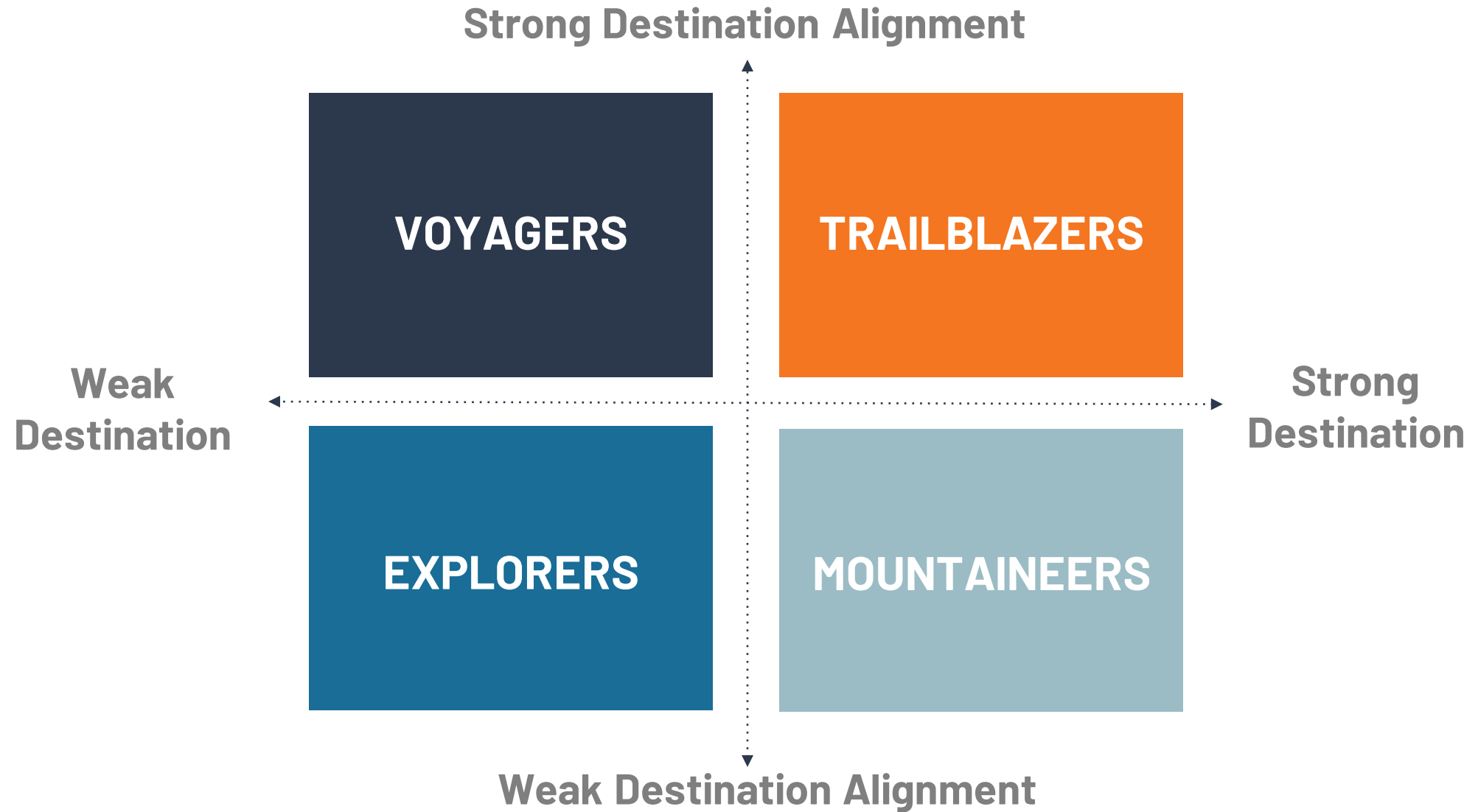


DESTINATIONS
INTERNATIONAL



NextFactor

Scenario Model



2014

1. Broadcast to Engagement
2. Destination Managers
3. Collaboration & Partnerships

2017

1. Curators of content
2. Adopters of business intel
3. Catalysts of economic dev.
4. Activists in placemaking
5. Collaborators of partnerships

2019

1. Destination stewardship
2. Community alignment
3. Digital conversion

2021

1. Destination alignment
2. Sustainable development
3. Values based marketing

Low-Ranking Trends

Year	# of Trends	Ranking	Trend
2014	64	63 57 49 48	Global warming All-inclusive experiences Sustainability Labor shortages
2017	75	75 64 53	Legacy benefits Conscious travel Sharing economy
2019	52	50 45 44	Over tourism AI STR's & workforce housing
2021	100	100 85 83 70	Over tourism AI Workforce Social/economic problems
2023	50	48 45 36	Remote working Workforce housing Homelessness

2023 Futures Study

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

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

6

Resident sentiment is becoming a key measurement

9

DMO/CVBs are increasing advocacy to communicate value of visitor economy to government

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

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Protect revenue sources to maintain current funding levels

Mandate Map



DMO Mandate



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

Thank You!

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