# DESTINATION NEXT

Futures Study 2019

A Strategic Road Map for the Next Generation of Global Destination Organizations

DESTINATIONS INTERNATIONAL

FUNDED BY

DESTINATIONS INTERNATIONAL FOUNDATION

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Dear Reader,

We are pleased to present our 2019 DestinationNEXT Futures Study — a strategic road map for the next generation of global destination organizations.

The technological advancements within our industry are rapidly increasing the pace of change and creating new opportunities. Destination leaders must continuously look to the future to remain relevant, and this study will support your organization in that effort.

During Destinations International's 100th anniversary in 2014, the Destinations International Foundation released its first DestinationNEXT Futures Study, the most comprehensive and insightful report of its type in the foundation's history. Since that release, we updated the report in 2017 and now again in 2019 to shape the strategic plans of our members around the world. Each report has provided a clear plan for where destinations are going and the strategies they are employing.

The 2019 Futures Study focuses on three transformational opportunities — destination stewardship, community alignment and digital conversion — to help destination leaders formulate strategic decisions for the future. We believe that destination leaders need to leverage all three of these opportunities collectively to effectively lead their 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.

Sincerely,

**Don Welsh**

President and CEO,
Destinations International

**Jack Johnson**

Chief Advocacy Officer,
Destinations International

Executive Director,
Destinations International
Foundation

# Table of Contents

MMGY NextFactor

August 2019

Dear Reader,

It is our pleasure to present the DestinationNEXT 2019 Futures Study. Our industry has enjoyed years of growth and development, but today we face emerging economic, political, social and environmental pressures that are forcing us to adapt to new realities.

The DestinationNEXT 2019 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 500 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 that, the DestinationNEXT Scenario Model and Assessment Tool helps stakeholders strategically evaluate their destinations. MMGY NextFactor has now led more than 200 detailed assessments of destinations around the world. This has provided many additional insights into the opportunities and challenges present in both the leisure and business event markets.

We would like to acknowledge the important contributions of the Destinations International Foundation, whose funding has made DestinationNEXT possible. We also want to express our gratitude to our Advisory Council. Their advice and support have been invaluable.

Yours truly,

Greg Oates

**Paul Ouimet**

Partner, President,
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Managing Director,
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Destinations International

**Greg Oates**

SVP Innovation,
MMGY NextFactor

# Executive Summary

## DestinationNEXT 2019 Futures Study

**Destination organizations today are collaborating more closely with their local communities to define a shared vision for the future that provides long-term benefits for both key stakeholders and residents.**

**There is also a much greater emphasis on community-driven destination development that aligns around the three integrated pillars of economic, social and environmental sustainability to drive competitive advantage in today's global visitor economy.**

**Lastly, the increasingly sophisticated digitization across the industry is connecting destination partners and individual consumers more directly than ever before.**

Those are the primary themes in the DestinationNEXT 2019 Futures Study, produced by MMGY NextFactor on behalf of Destinations International.

The 2019 Futures Study is based on a global survey that asked destination leaders worldwide to rank a predetermined series of visitor industry trends in terms of their relevance for their specific region. Participants were also asked to rank a number of strategies by importance that destination organizations are using to accelerate or manage visitor growth, based on those trends.

For 2019, more than 500 destinations in over 50 countries contributed to this year's rankings of 52 trends and 64 strategies.

The survey data was then used to develop the following three transformational opportunities to help destination leaders formulate strategic decisions heading into the future. Together, they provide an integrated framework designed to both grow the visitor economy and support the mandates of local government, industry and community organizations.

### 1. Destination Stewardship

Balancing economic development, sustainable tourism and quality of life.

### 2. Community Alignment

Building public support around a shared vision for the destination.

### 3. Digital Conversion

Connecting with visitors on mobile devices to drive real-time sales in-destination.

# Scenario Model

**The DestinationNEXT 2019 framework also includes a Scenario Model that assesses the levels of destination strength and community alignment in relation to the visitor economy, based on 10 weighted variables for each.**

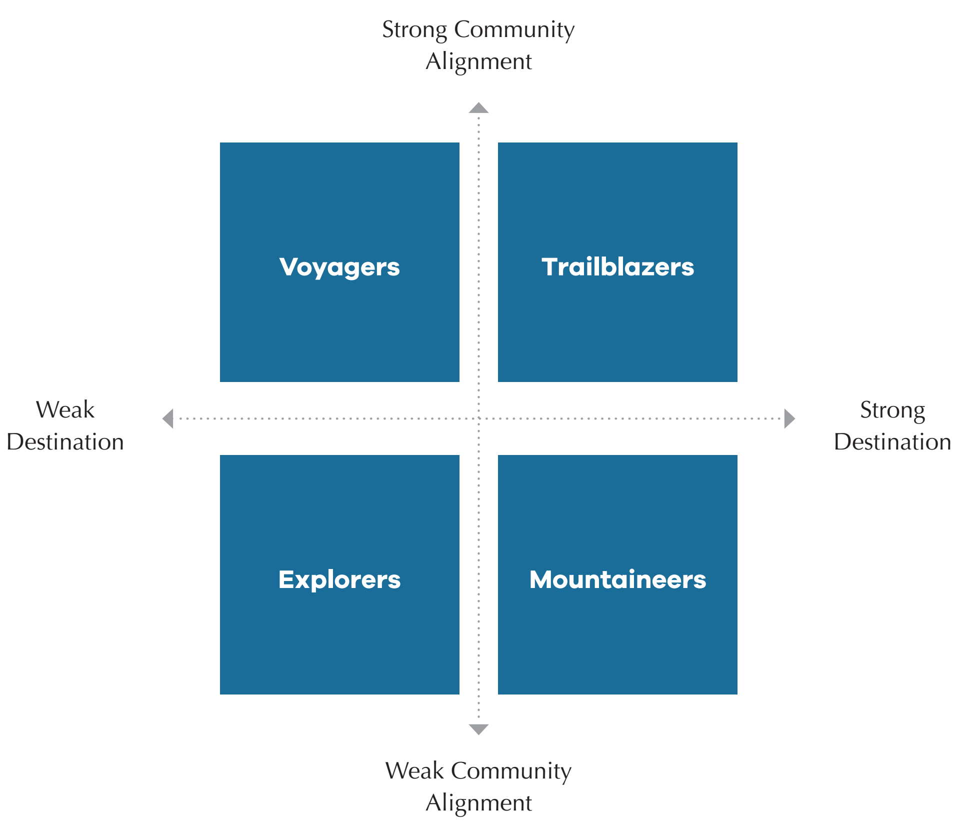
**The survey data from the assessments is used to plot the destination in one of the four quadrants making up the Scenario Model. Each of those four scenarios have specific strategies that destination organizations should employ to address challenges and opportunities.**

The present DestinationNEXT 2019 Scenario Model remains mostly unchanged from previous years. That illustrates its effectiveness as a platform for bringing together government leaders, civic organizations and other key stakeholders to co-create a strategic road map for the future of their destinations.

Since 2015, more than 200 destinations worldwide have completed the assessment.

Based on that success and growing demand, MMGY NextFactor has developed, and will soon be releasing, three new dedicated DestinationNEXT assessment models with revised surveys created specifically for global cities, luxury destinations, and small cities.

In just five years since the launch of DestinationNEXT, the global visitor economy has evolved in ways we never could have imagined. The insight here will help all destination organizations navigate the future more strategically based on the empirical data provided throughout.



# Introduction

## A Changing World

**From an industry perspective, much of the available insight informing the future direction of destination marketing and management is highly fragmented.**

**To help address that, the DestinationNEXT 2019 Futures Study is a comprehensive and integrated framework of data-driven intelligence for destination organizations of all sizes, models and budgets.**

**The Futures Study is designed to support strategic decision-making that aligns with any individual organization's mandates in almost any region of the world.**

Those mandates are wide ranging. For some destinations, the priority is driving visitor volume and spend above all else. For them, room nights, average daily rate, per person spend, and citywide event attendance metrics are the key measurements of success, and everything else is a distant second.

Many other destination leaders, meanwhile, are expanding the definition of why they do what they do. They measure visitor volume, naturally, but there's increasing focus on qualitative performance indicators that speak to their organization's relationship with local residents and community organizations.

These destination leaders are prioritizing greater collaboration and alignment with local government, key industry stakeholders, civic leaders, and the non-industry community at large (referred to as "community" moving forward). They're investing time and resources in community-driven destination development and expanding their networks among a wider breadth of local organizations outside the hospitality and tourism industry.

This serves many purposes. It accelerates equitable economic development, and it provides more opportunities for more people in more neighborhoods. It also helps validate public funding, improve resident sentiment, build stronger communities, inspire the next generation of young leaders, protect local resources, support workforce attraction and development, and elevate the destination brand, among many other things.

The shift from destination marketing to management is not a new conversation. The DestinationNEXT 2019 Futures Study, however, illustrates just how significantly that trajectory is scaling today, and how organizations worldwide are adapting. The number of new trends and strategies this year, and how others from previous years have moved up the rankings, validate how many industry leaders are now much more intentional about destination management.

The most progressive organizations today are positioning themselves as a shared community value, with an integral role in uplifting a greater scope of different audiences — both local and global. There's also a much more focused sense of purpose around

integrated sustainability, where more destination organizations are addressing, collectively, the long-term economic, social and environmental impacts of their decisions in collaboration with their local community and key stakeholders.

This greater emphasis on destination management and community building is still very much aligned with the traditional mandates for destination organizations, in terms of driving higher visitor spend and new business development in the region.

"Our Sustainable Moments initiative has created an entirely new audience for both consumer and business events," explains Tammy Blount-Canavan, President & CEO of the Monterey County Convention & Visitors Bureau. "The time spent on stewardship and engagement initiatives aren't just feel-goods. There's a compelling business case because we can improve the visitor experience with stronger community buy-in. Yes, we have a heads-in-beds mandate, but that doesn't mean we're not creative in how we pursue it. And isn't that our purpose, to create a better quality of life as a result of our contributions?"

That was a consistent theme that destination leaders shared during the development of the DestinationNEXT 2019 Futures Study. There is still much work to be done to clarify and codify how destination leaders can embrace this vision, but clearly, the industry is coming together around a new shared vision and mission for the future.

# Work Plan

## Phase 1:
## **4 Advisory Panels**

**The DestinationNEXT 2019 Futures Study includes a ranking of 52 marketplace and industry trends driving shifts in the global visitor economy. There are also 64 strategies that destination organizations are employing today based on those trends.**

**Work began in January 2019 to update the Futures Study. To start, MMGY NextFactor consulted with four expert advisory panels to identify new and ongoing shifts in the global visitor economy. The panels included:**

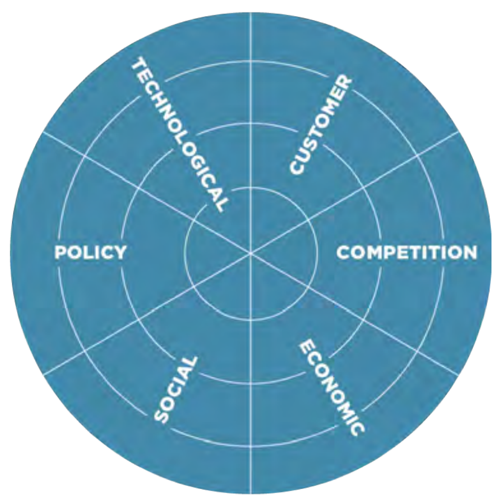
1. **Industry Disruptors**
   Leaders in the sharing economy, social and digital media, data and mobile technology
2. **Industry Clients**
   Tour operators, meeting planners and event organizers
3. **Community Leaders**
   Municipal and state governments, foundations and nonprofits, and civic and cultural orgranizations
4. **Destination Leaders**
   Top advisors and consultants in our industry

Together, the MMGY NextFactor team and the advisory panels defined the top 52 trends and 64 strategies. See Appendix A and B for a full list of each. Some of the trends and strategies are new for DestinationNEXT 2019, while others were rolled over from 2017 because they're still evolving and impacting the industry in new ways today.

## Phase 2:
## **Strategic Radar Map**

The top trends were categorized in a strategic radar map, utilized in previous Future Studies, segmented by trends relating to: Customer, Competition, Economic, Social, Policy and Technological themes

The lowest-ranked trends from DestinationNEXT 2017 were eliminated from the list, leaving a total of 52 trends to be considered for 2019. The lowest-ranked strategies from 2017 were also eliminated, leaving a total number of 64 strategies for 2019.




**52** Trends
**64** Strategies

## Phase 3:
## **Global Survey**

The 52 trends and 64 strategies were used to develop the DestinationNEXT 2019 Futures Study survey, which asked respondents to rank the trends and strategies in order of relevance and importance. There were also a number of additional general questions, which are included in Appendix D.

The survey was distributed to Destinations International members and several other industry mailing lists, including: UNWTO, ECM, AACB, PCMA, IMEX and USTA, among others.

A total of 521 destination and industry leaders in 55 countries participated in the survey. The results of the 2019 rankings were then compared against DestinationNEXT 2017 data to determine the major shifts driving the future of the global visitor economy.

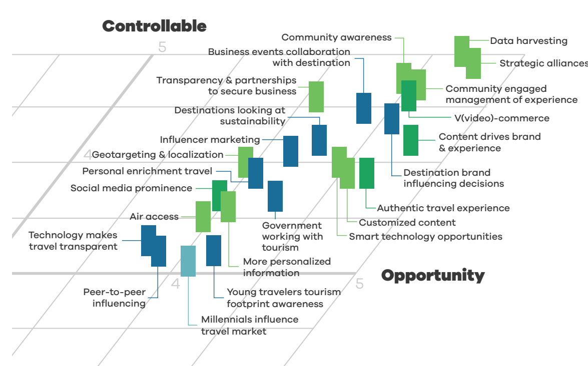
**521** Participants
**55** Countries

## Phase 4:
## **Future Map and 3 Transformational Opportunities**

MMGY NextFactor completed a cluster analysis of the survey results to develop a new Future Map for DestinationNEXT 2019.

The purpose of the Future Map is to categorize the industry and marketplace trends in terms of how destination leaders can control, leverage, monitor or mitigate them.

The Future Map informed the development of the three new transformational opportunities for destination leaders today, based on the specific marketplace and industry trends that organizations can exploit most effectively.



# Advisory Panel Takeaways

## Leaders and Disruptors

**Here are the primary takeaways and top-line insights culled from the four advisory panels. These were crucial for determining the lists of industry trends and destination organization strategies that populated the DestinationNEXT 2019 survey.**

**Panel members provided much more contextual intelligence around the trends and strategies defining the future of the visitor economy, which has been integrated throughout this document.**

“Greater focus on integrating economic, social and environmental sustainability will become imperative.”

## Industry Disruptors Panel

**Destination organizations are uniquely positioned to capture and synthesize key data for organizations outside the visitor economy.** Developing destination data management and analytical capabilities creates high-value collaboration opportunities with other destination stakeholders in government, economic development, academic institutions, etc.

**Continued strong travel demand, especially from growing middle classes in Asia, India and MENA, will force more intentional destination stewardship.** Emerging source markets will challenge global iconic destinations (e.g. New York, Venice, Paris) to balance growth, quality of life and community support.

**Greater focus on integrating economic, social and environmental sustainability will become imperative.** Both established and emerging destinations can drive competitive advantage by developing strategies that align collectively with the long-term viability of profit, people and planet.

**Tourism and destination organization leaders will need to take steps to attract and retain talent with the appropriate analytical and developmental skill sets.** This will mean competing more aggressively for skilled talent with established, higher paying industries.

**The technological and sociological evolution outside the tourism industry is faster and more pervasive than within the tourism industry.** This is prompting the need for tourism enterprises of all sizes to consider new forms of business relationships (e.g. joint ventures, partnerships, etc.) with non-traditional entities in order to meet visitor and stakeholder expectations.

**Growing use of augmented and virtual reality in content delivery, and more use of artificial intelligence to customize content.** The whole issue of generational expectations around engagement and education delivery will have an impact on both leisure and business event markets.

## Industry Clients Panel

**Safety, security, climate change, and political/economic realities are now top considerations for choosing destinations, especially for meetings.** The industry is lacking risk management protocols to help stakeholders mitigate threats.

**Meeting and event planners are seeing the impact of consolidation within the industry.** Hotel consolidation is leading to concerns about competition, pricing and negotiations.

**Planners are demanding a different valuation of their business than "heads in contracted beds," given shifts in the business and room-sharing.** The industry is long overdue in developing a new shared vision of success for the future.

**It is harder to differentiate what really makes a destination and its local experiences "unique."** There needs to be greater emphasis on community-driven destination and product development.

**Sustainability in the industry is increasingly top of mind, especially for younger generations.** The industry can do much better in terms of managing overall impacts globally and locally.

**The balance between business event sales and services is out of whack.** The destination organization sales model is still too traditional, based on dates, rates and space. There is increased discussion about event outcomes, intellectual capital and knowledge clusters, but too few cities are delivering on that.

## Community Leaders Panel

**Destination management is becoming a key role for destination leaders.** Destination organizations are taking on more responsibility to lead and facilitate future-oriented planning with stakeholders in their communities.

**Visitor dispersal is a key strategy to manage high compression levels.** Developing experiences in places beyond the main draws for a destination are helping to alleviate impacts.

**Social impacts of tourism and business events are becoming more important.** Destinations need to better understand and plan for the societal effects their industry is having in their communities.

**Although common trends are impacting destinations around the world, many differences exist on the key issues from region to region.** Flexible and tailor-made destination strategies at a local level are key to success.

**The rise of emerging destinations will continue to accelerate.** Developing destinations and some completely new destinations are eagerly being sought after by leisure visitors and business event groups.

**Risk and crisis management is becoming the norm for destinations around the world.** Matters of safety and security, climate change and international public health are driving destinations and destination organizations to ensure they have mitigation strategies in place.


## Destination Leaders Panel

**More destination organizations are embracing their evolving role in sustainable destination management and equitable economic development.** Destination organizations are defining their missions as community leaders, stewarding the convergence of tourism, community, urban and economic development for the benefit of residents.

**Community advocacy and alignment are much more critical priorities today for destination organizations.** Destination leaders today are increasingly building coalition among the public and private sectors around a shared vision for the future of the destination, which prioritizes inclusivity, diversity, advanced mobility and connectivity, workforce development and higher quality of life.

**Destinations must bring new room-sharing platforms, mobility options and other emerging technologies into the fold.** Many public and private sector leaders are perceived as being afraid of real innovation and taking any level of substantive risk to try new things.

**Destination organizations are increasingly positioning their cities as a place to learn, grow and be inspired, both in the leisure and meetings markets.** The greater value proposition of a destination lies within the community’s unique lifestyle and cultural DNA, above and beyond the attributes of the destination itself.

**Advancements in artificial intelligence and live inventory platforms are delivering consumers more personalized travel experiences and driving higher conversion.** The rise of on-demand, in-destination mobile booking options with platforms ranging from TripAdvisor to Airbnb are providing more business opportunities for independent tour and activity providers.

**City, regional and national budgets are declining, and governments are attacking tourism funding more than ever before.** Destination organizations are increasingly having to explore alternative funding due to increasing pressures from many different entities. They’re also collaborating much more with local organizations to address an expanding scope of social issues in their communities.

# Survey Profile

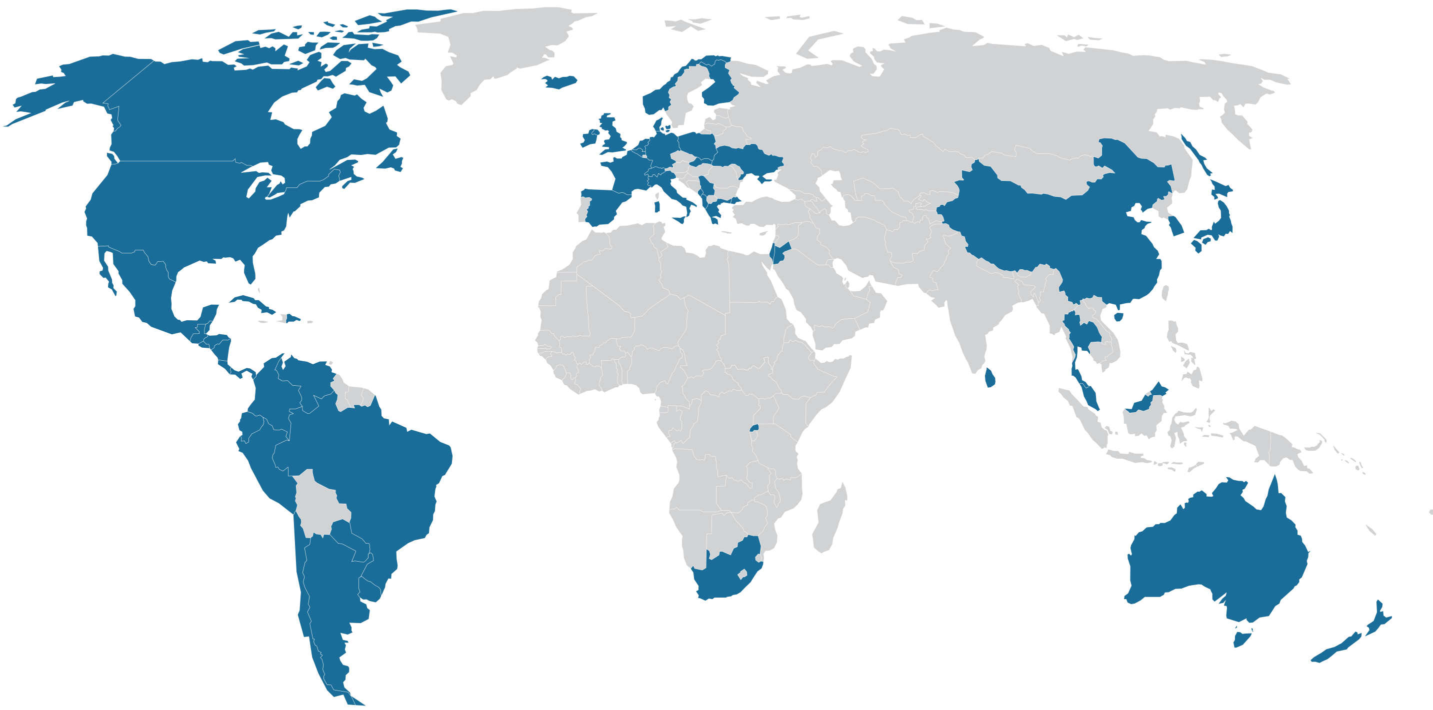
## Survey Profile

**An extensive global survey was sent to industry leaders in May 2019. It covered four areas:**

1. **Business and governance profile of the destination organization**
2. **Key trends impacting the industry and global visitor economy**
3. **Destination organization strategies in response to key trends**
4. **Future-proofing the destination organization to adapt to global socio-economic and environmental shifts**

The response was strong, with 521 industry leaders in 55 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.

## Survey Responses

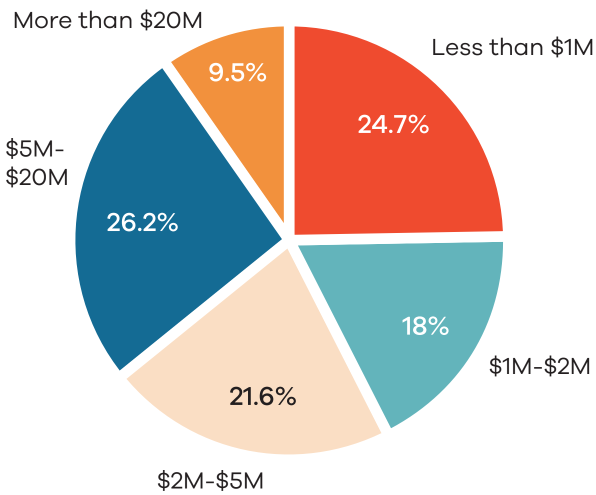


| | | | | | |
|---|---|---|---|---|---|
| Albania | Cuba | Guatemala | Mexico | Poland | Ukraine |
| Argentina | Denmark | Honduras | Monaco | Rwanda | United Kingdom |
| Australia | Dominican Rep. | Iceland | Montenegro | Serbia | United States |
| Belgium | Ecuador | Ireland | Netherlands | Slovakia | Uruguay |
| Brazil | El Salvador | Israel | New Zealand | South Africa | Venezuela |
| Canada | Estonia | Italy | Nicaragua | South Korea | |
| Chile | Finland | Japan | Norway | Spain | |
| China | France | Jordan | Panama | Sri Lanka | |
| Colombia | Germany | Macau | Paraguay | Switzerland | |
| Costa Rica | Greece | Malaysia | Peru | Thailand | |

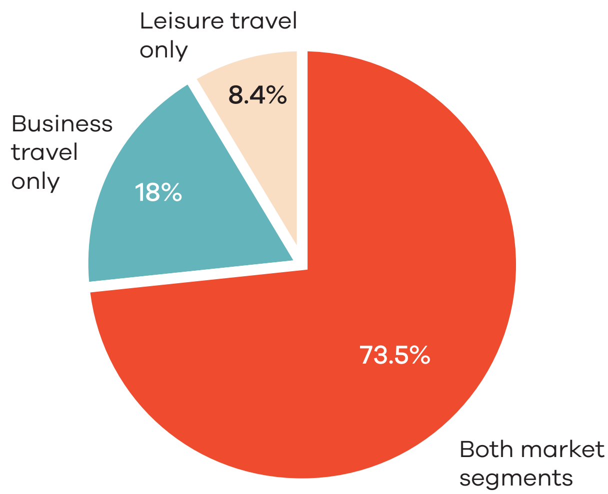
**521 Participants**

**55 Countries**

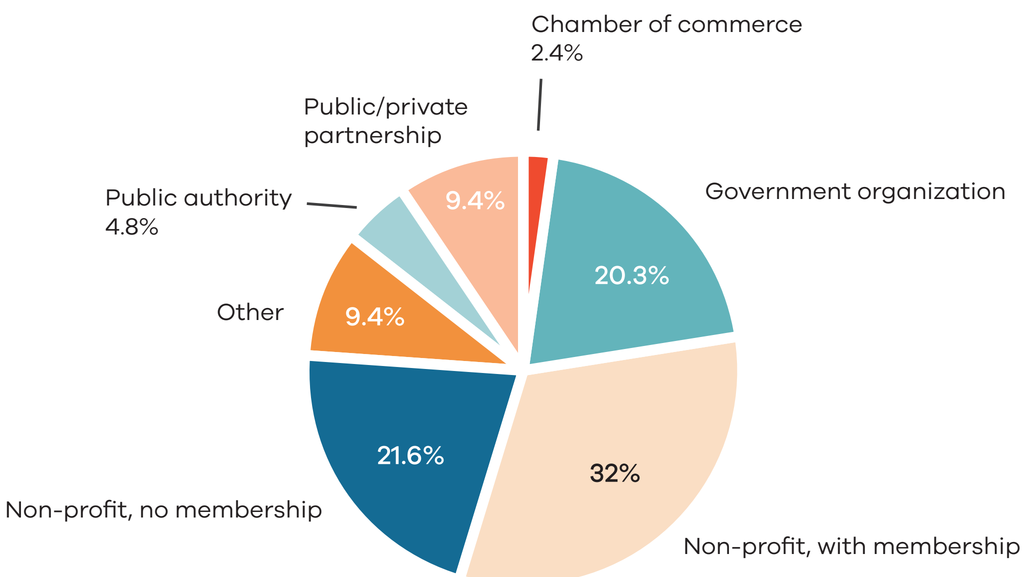
## Organization's Budget



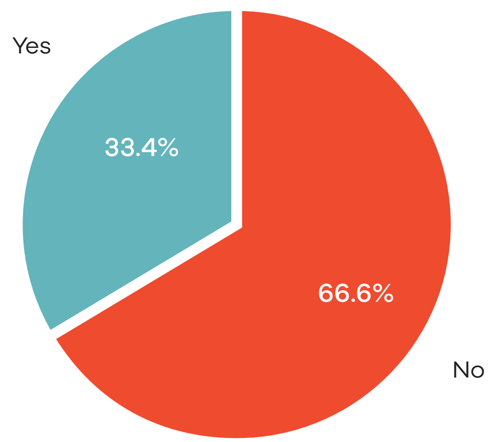

## Market Responsibility




## Business Model

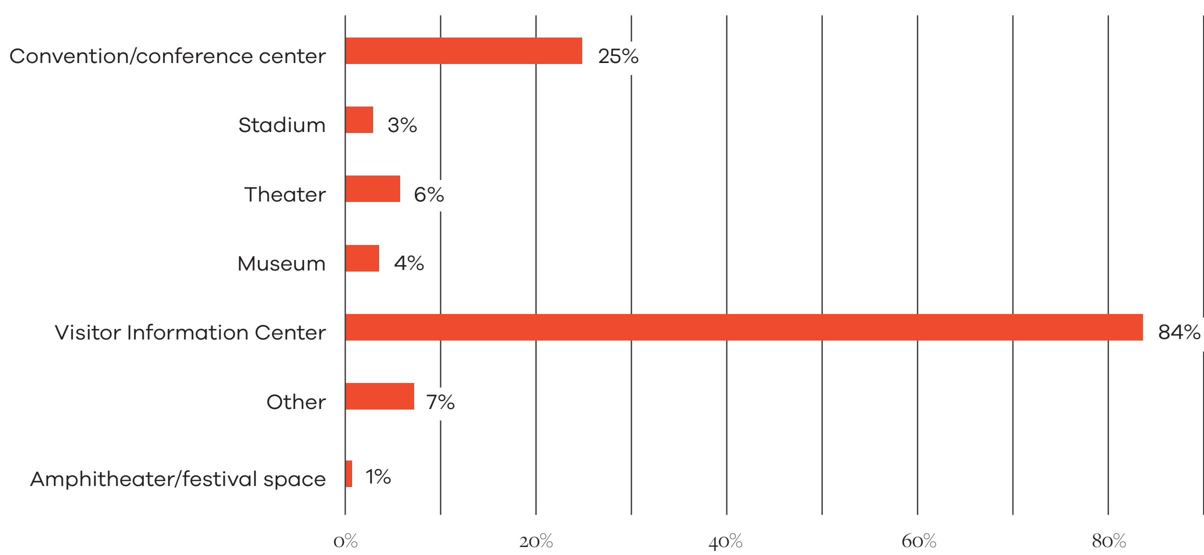


## Organization Manages or Operates Community-Based Venue(s)




## Type of Community-Based Venues

(Based on those that answered "Yes." Does not add up to 100% due to multiple answers.)



# Top 25 Trends

## 2019 Trends

**These are the top 25 out of 52 ranked industry and consumer trends. The change in ranking from DestinationNEXT 2017, or if the ranking is new this year, is indicated for each. The complete list of trends is included in Appendix A.**

## Trend Rankings

| | Trend Rankings | Change |
|---|---|---|
| 1. | Customers increasingly seeking a unique, authentic travel experience. | ▲2 |
| 2. | Content creation and dissemination by the public across all platforms drives the destination brand and experience. | 0 |
| 3. | Social media's increasing prominence in reaching the travel market. | ▼2 |
| 4. | Video becomes the new currency of destination marketing and storytelling. | ▲2 |
| 5. | Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations. | ▲2 |
| 6. | Mobile devices and apps becoming the primary engagement platform for travelers. | ▼1 |
| 7. | Travelers demanding more information, control, interaction and personalized information. | ▲10 |
| 8. | Customers increasingly expect highly curated and customized destination content. | ▲5 |
| 9. | Smart technology creating new opportunities for innovative new services and processes. | ▼1 |
| 10. | Geotargeting and localization becoming more prevalent. | 0 |
| 11. | Communities more engaged in the development and management of the destination experience. | ▲13 |
| 12. | Increasing importance of transparency and building partnerships to secure business to a destination. | ▲39 |
| 13. | Organizations are increasingly developing strategic alliances across multiple economic sectors in order to leverage resources. | ▼2 |
| 14. | More communities and municipal governments are aware of importance of tourism to local economy and job growth. | New |
| 15. | Air access to a destination is a key factor in attracting business. | ▲1 |
| 16. | Travelers are seeking more personal enrichment, including wellness and wellbeing. | New |
| 17. | Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts. | New |
| 18. | More third-party information providers aggregating content about destinations. | ▲23 |
| 19. | Peer-to-peer buyer influence driving customer purchases. | ▲10 |
| 20. | The brand of a destination becoming a more important factor for destination decisions. | ▼6 |
| 21. | Governments dealing with tourism from an integrated, multi-departmental perspective that is focused on economic development. | ▲7 |
| 22. | Technology makes travel products and services more transparent to the customer. | ▲1 |
| 23. | More information clutter and noise about destinations occurring in the marketplace. | ▲31 |
| 24. | Young travelers are more aware of their impact on the communities and environment they visit. | New |
| 25. | Influencer marketing is becoming an increasingly essential component of the destination marketing mix. | New |

# Future Map

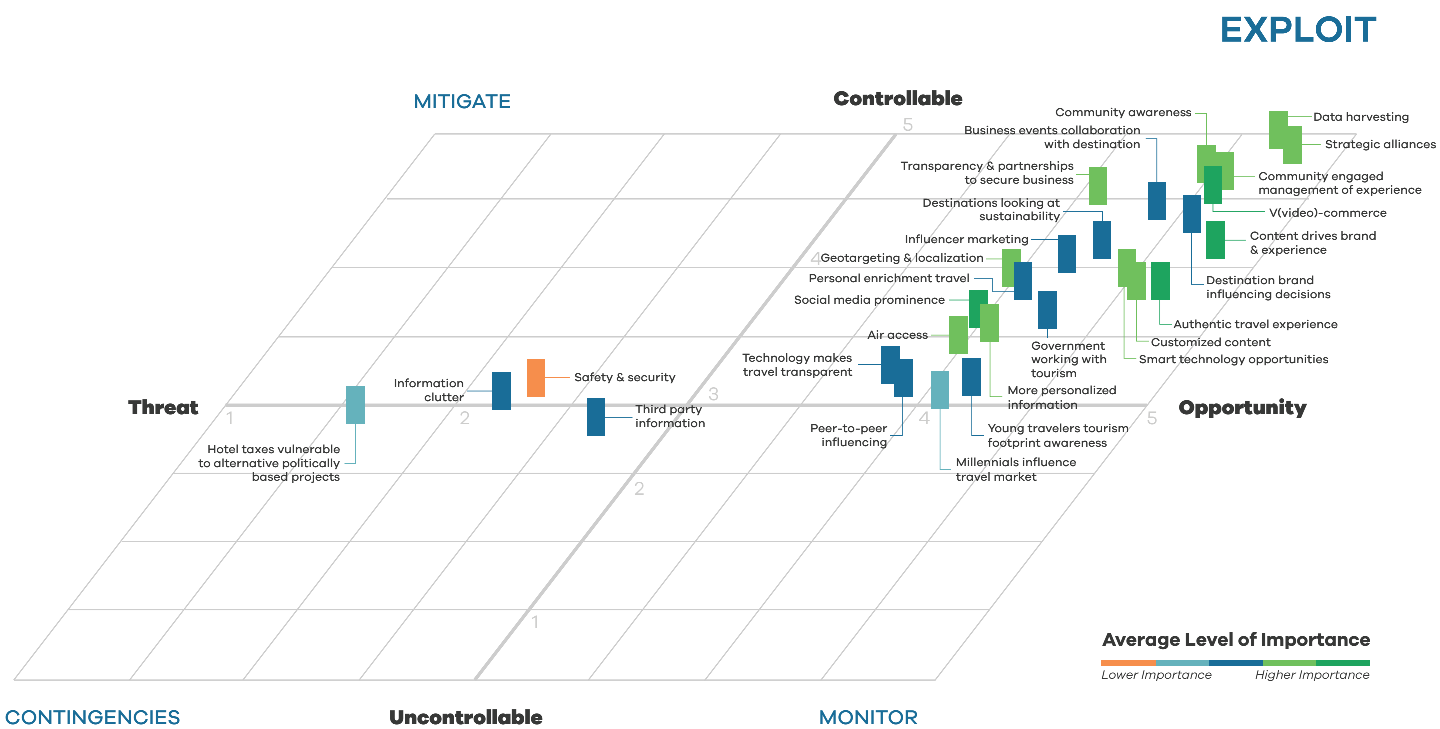
## 2019 Opportunities

**The top 20 aggregate 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 or affect. The analysis identified a significant variety 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 identified a significant variety of opportunities to exploit.”



# Top 25 Strategies

## 2019 Strategies

**Following are the top 25 ranked destination organization strategies among the 64 strategies overall. Their change in ranking from DestinationNEXT 2017, or if the strategy is new this year, is indicated for each. The complete list of strategies is included in Appendix B.**

## Strategy Rankings

| Strategy Rankings | Change |
|---|---|
| 1. My destination organization will enhance our engagement with the local community to manage future tourism considerations. | ▲5 |
| 2. My destination organization will play more of a central role in advocacy in my destination. | ▲3 |
| 3. My destination organization will focus significant attention to content creation and dissemination strategies. | ▼1 |
| 4. My destination organization will invest more effort and resources into video content to market the destination. | ▼3 |
| 5. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations. | ▲10 |
| 6. My destination organization will act as conduit to build social networks among our local business community. | ▲33 |
| 7. My destination will focus on developing authentic experiences for the customer. | ▼4 |
| 8. My destination will have a tourism master plan to define long-term destination development. | NEW |
| 9. My destination organization will design digital customer engagement primarily around mobile platforms. | ▼1 |
| 10. The economic impact of tourism and conventions will be better understood in my destination. | ▲2 |
| 11. My destination will better integrate tourism, economic development and talent attraction. | NEW |
| 12. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics. | ▲19 |
| 13. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact. | ▲3 |
| 14. My destination organization will form more strategic alliances outside the tourism industry. | 0 |
| 15. My destination will develop strategies to protect what we have while attracting events and visitation to our community. | ▼8 |
| 16. My destination will develop ways to connect with customers through all stages of their experience from awareness to interest to booking to visiting to post-visit. | ▼12 |
| 17. My destination organization will balance the need for growth with responsible and sustainable development. | ▲11 |
| 18. My destination organization will develop outreach programs in our local community to broaden our networks. | NEW |
| 19. My destination organization will leverage our region's priority sectors to generate business. | NEW |
| 20. My destination organization will be more involved in economic development initiatives. | ▼10 |
| 21. My destination organization will place greater emphasis on engaging with customers in two-way conversations, more so than one-directional communication. | ▼12 |
| 22. My destination organization will acquire competencies and skillsets to effectively compete in a disruptive economy. | ▲2 |
| 23. My destination organization will participate more in building platforms to improve the visitor experience. | 0 |
| 24. My destination organization will connect visitor experience with the quality of life of residents in my community. | ▼11 |
| 25. My destination organization will put a greater emphasis on market segmentation. | ▼8 |

# 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.**

## 1. Destination Stewardship

Building public-sector coalition between the visitor industry, economic development agencies, academic institutions, and civic and philanthropic organizations. The goal is to curate more immersive destination experiences, manage sustainable visitor growth, promote equitable economic development, and elevate quality of life and quality of place.

## 2. Community Alignment

Improving resident sentiment and government support around a shared vision for the future to accelerate important destination development initiatives, protect public funding, and improve hospitality culture. The value of the visitor economy and role of destination organizations must be better understood and appreciated.

## 3. Digital Conversion

Developing more video and personalized digital strategies on mobile platforms to improve marketing effectiveness and drive higher sales in real time. Advancements in artificial intelligence, chat and other technologies are connecting industry and visitor audiences in new ways to accelerate conversion in our on-demand world.

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 2017 based on:

1. Changing consumer motivations, behaviors and expectations in a highly disruptive marketplace impacting all facets of the global visitor economy

2. Digital advancements in search, customer targeting and engagement, artificial intelligence, mixed realities, voice and text chat, mobile e-commerce and other technologies

3. A more comprehensive understanding globally of sustainability through an integrated, three-pillar prism aligning long-term economic, social and environmental imp;acts

4. The critical need to include local community and key stakeholders in strategic planning, destination management and equitable economic development

5. All of the new and continually evolving macro social, political, environmental and economic issues disrupting the world order

6. The increasingly intense review of public funding and governance models reshaping how destination organizations drive business and engage their various audiences

“Destination leaders are collaborating more strategically with local organizations to develop more community-driven visitor experiences.”

## Destination Stewardship

The most significant shift overall for destination organizations worldwide is the expanding role from destination marketing to destination management. According to the UNWTO in May 2019, “Destination management addresses the interactions between visitors, the industry that serves them, the community that hosts them, and the environment (natural, built and cultural).”

A growing number of destination leaders prefer the term “destination stewardship,” which speaks more to the growing role they have in influencing how government, the industry, visitors and residents interact, rather than directly “managing” the destination in any literal sense.

Today, destination organizations are focusing more intentionally on developing new destination experiences and stakeholder networks that incorporate a wider breadth of local companies and organizations, including many outside tourism and hospitality.

This is because there’s greater awareness today about how the visitor economy can be leveraged more effectively to drive equitable and sustainable economic development that benefits a broader spectrum of communities in a destination.

Likewise, destination leaders are collaborating more strategically with local organizations and residents to develop more community-driven visitor experiences.

In addition, destination organizations are stewarding their cities through many political, social, economic and environmental challenges disrupting the global visitor industry. They’re expanding resources dedicated to developing inclusivity and diversity initiatives; improving workforce development and customer service training; increasing partner education around emerging technologies and consumer trends; addressing myriad social issues impacting both the community and the visitor experience; and a host of other non-sales and marketing responsibilities.

That said, destination stewardship is not about distracting destination organizations from their traditional roles of promoting the region and driving higher visitor volume and spend.

Rather, by expanding their organization’s role in destination development and community building, destination leaders can increase sales and marketing opportunities because there’s a more immersive, connected, multidisciplinary visitor experience, and a more layered brand story to promote to the world.

## Trends Related to Destination Stewardship

1. Customers are increasingly seeking a unique, authentic travel experience.

12. Increasing importance of transparency and building partnerships to secure business to a destination.

15. Air access to a destination is a key factor in attracting business.

16. People are seeking more personal enrichment in their travels, including wellness and well-being.

17. Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts.

20. The brand of a destination is becoming a more important factor for destination decisions.

21. Governments are dealing with tourism from an integrated, multi-departmental perspective focused on economic development.

24. Young travelers are more aware of their impact on the communities and environment they experience.

26. Business event customers are looking for better collaboration with destinations and suppliers to achieve greater business outcomes.

## Redefining Sustainability

Destination stewardship is about embracing a more comprehensive definition of integrated sustainability, which collectively addresses the long-term economic, social and environmental viability for a destination. It's about balancing new business opportunities, visitor growth, environmental responsibility and quality of life while ensuring that residents across the region participate in, and benefit from, community-driven tourism and destination development.

This is not new. As far back as 2005, the UNWTO defined sustainable tourism as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities."

However, for most people both within and outside the visitor economy, the concept of sustainability is still typically used in relation to environmental stewardship. As the front door to the global visitor economy, destination organizations worldwide must unite around a more comprehensive definition of sustainability in order to guide the future of how they connect with global citizens more successfully, inclusively and responsibly.

The vision statement for the Yukon Government Department of Tourism and Culture in Canada expresses this long-term perspective well: "Our vision is for tourism to be a vibrant, sustainable component of the Yukon's economy and society for the benefit of future generations."

## Strategies Related to Destination Stewardship

7. My destination will focus on developing authentic experiences for the customer.
8. My destination will have a tourism master plan to define long-term destination development direction.
11. My destination will take steps to better integrate tourism, economic development and talent attraction.
12. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics.
15. My destination will develop strategies to protect what we have while attracting events and visitation to our community.
17. My destination organization will balance the need for growth with responsible and sustainable development.
19. My destination organization will leverage our destination's priority industry sectors to generate business.
20. My destination organization will be more involved in broader economic development projects and initiatives.
22. My destination organization will acquire competencies and skillsets to effectively compete in a disruptive economy.

“My destination organization will enhance our engagement with the local community to manage future tourism considerations.”

## Community Alignment

The most effective destination organizations have the support of government officials and area residents who believe that the visitor industry positively impacts the local economy and elevates the overall quality of life for a diverse range of communities.

Clearly, more destination leaders are aware of this. The #1 and #2 strategies in the 2019 Futures Study are, respectively: 1) My destination organization will enhance our engagement with the local community to manage future tourism considerations; and 2) My destination organization will play more of a central role in advocacy in my destination.

This is not easy to accomplish in the short term. Building coalition among the public and private sectors to move a destination toward a common goal requires engaging many different audiences with opposing agendas. Therefore, destination organizations are focusing more on community advocacy to serve their residents.

This increases buy-in and improves community alignment, which helps drive competitive advantage for the destination. When government and residents agree on the value of the visitor industry to accelerate long-term economic and community development, then it’s much easier to build support for new destination stewardship initiatives that benefit locals and visitors.

Strong community alignment also helps destination organizations protect their public funding, which is being attacked more aggressively than ever before, often, but not always, for politically motivated reasons. That’s why it’s more critical than ever for destination leaders to show how their organizations are engaging and understanding their local community with the same level of intention directed at elected officials and industry stakeholders.

Today, some successful destinations are doing this by changing their key performance indicators and replacing traditional metrics such as room nights booked. The Hawaii Tourism Authority, for example, calculates resident sentiment as one of its four key measures of success (along with visitor satisfaction, per person spend, and total visitor expenditure).

Progressive destination organizations are visionary, innovative and aspirational, with the best interests of their communities at heart. But without a high level of community alignment, support and engagement, it can be challenging to implement new strategic initiatives that elevate the destination experience for travelers and improve livability for residents.

## Trends Related to Community Alignment

11. Communities more engaged in the development and management of the destination experience.

13. Organizations are increasingly developing strategic alliances across multiple economic sectors in order to leverage resources.

14. More communities and municipal governments are aware of the importance of tourism to local economy and job growth.

21. Governments dealing with tourism from an integrated, multi-departmental perspective, focused on economic development.

28. Business events increasingly shifting to be regarded as agents of long-term economic development for communities.

“The economic impact of tourism and conventions will be better understood in my destination.”

## Strategies Related to Community Alignment

1. My destination organization will enhance our engagement with the local community to manage future tourism considerations.

2. My destination organization will play more of a central role in advocacy in my destination.

5. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations.

6. My destination organization will act as conduit to build social networks among our local business community.

10. The economic impact of tourism and conventions will be better understood in my destination.

11. My destination organization will connect visitor experience with the quality of life of residents in my community.

13. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact.

14. My destination organization will form more strategic alliances outside the destination organization industry.

18. My destination organization will develop outreach programs in our local community to broaden our networks.

24. My destination organization will connect visitor experience with the quality of life of residents in my community.

“AI is the personalization engine powering digital conversion across all industries, giving brands the ability to deliver the right message to the right customer at the right time to drive purchase behavior.”

## Digital Conversion

The majority of the top trends in DestinationNEXT 2019, once again, relate to existing and emerging technologies that connect visitors and destinations in new ways.

The goal of personalized, real-time, digital connectivity with travel and other consumer brands is much more of a reality than it was two years ago. The big shift has been the growing sophistication of artificial intelligence (AI) and its more complex subset, machine learning. AI is the personalization engine powering digital converison across all industries, giving brands the ability to deliver the right message to the right customer at the right time to drive purchase behavior.

Some of the primary use cases for AI in travel include destination and product search, social media targeting, the sharing economy, conversational commerce (voice and text chat), augmented reality, autonomous systems, live inventory management, dynamic pricing, and all kinds of hyper-personalized brand messaging.

Like all industries, travel and tourism is shifting from a product-centric approach to a customer-centric approach, where companies customize their digital engagement around the personal preferences of the individual consumer using a complex series of algorithms – the building blocks of AI. Destinations are now embracing those technologies and developing new content and partnerships with third-party platforms to engage consumers more as individuals.

This evolution is a primary catalyst for the surge of investment activity and mergers during the last few years in the tours and activities sector. Companies like TripAdvisor, Booking.com, Expedia, Marriott, Accor and Airbnb, which traditionally operated primarily in the hospitality sector, are now major platforms for booking travel experiences. Meanwhile, global investors are pumping millions of dollars into many other tour providers, such as GetYourGuide, Ctrip and Klook.

This growth is driving the future of on-demand, in-destination mobile booking. Consumers are not always ready to commit to booking activities weeks before traveling, and previously, booking on mobile in-destination was limited to mainly mass tourism products.

Now, travel suppliers of all sizes have more opportunities to increase e-commerce sales. Therefore, destination organizations can drive higher traffic to those companies, helping increase conversion for a wider and more equitable breadth of local travel providers.

## Trends Related to Digital Conversion

2. Content creation and dissemination by the public across all platforms drives the destination brand and experience.
3. Social media's increasing prominence in reaching the travel market.
4. Video becomes the new currency of destination marketing and storytelling.
5. Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations.
6. Mobile devices and apps are becoming the primary engagement platform for travelers.
7. Travelers are demanding more information, control, interaction and personalized information.
8. Customers increasingly expect highly curated and customized content.
9. Smart technology is creating new opportunities for innovative new services and processes.
10. Geotargeting and localization are becoming more prevalent.
18. More third-party information providers are aggregating content about destinations.
19. Peer-to-peer buyer influence is driving customer purchases.
22. Technology makes travel products and services more transparent to the customer.
23. More information clutter and noise about destinations are occurring in the marketplace.
25. Influencer marketing is becoming an increasingly essential component of the destination marketing mix.

“Mobile devices and apps are becoming the primary engagement platform for travelers.”

## Strategies Related to Digital Conversion

3. My destination organization will focus significant attention on content creation and dissemination strategies.

4. My Destination Organization will invest more effort and resources into video content to market the destination.

9. My destination organization will design digital customer engagement primarily around mobile platforms.

16. My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.

21. My destination organization will place greater emphasis on engaging with customers in two-way conversations more so than one-directional communication.

23. My destination organization will participate more in building platforms to improve the visitor experience.

25. My destination organization will put a greater emphasis on market segmentation.


P

# Strategy Variances by Region

## Strategy Variances by Region

**The growth in DestinationNEXT survey responses from all regions of the world is a testament to the increasing sophistication of the global tourism industry. Unique regional perspectives and different levels of industry evolution contribute to varied focuses, leading to provocative interregional differences in strategic priorities.**

**The survey also highlighted a number of significant differences by organization mandate. See Appendix C.**

“DestinationNEXT survey data shows significant variances in strategic priorities for destination organizations based on geographic location.”

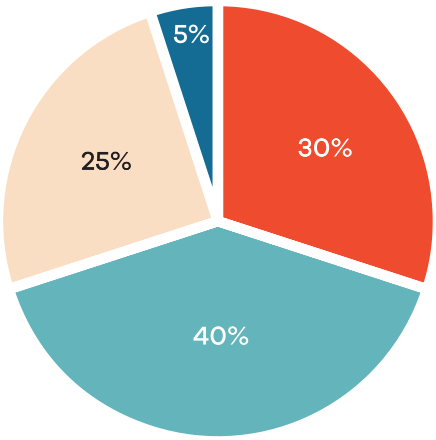
DestinationNEXT survey data shows significant variances in strategic priorities for destination organizations based on geographic location. We have clustered the top 20 strategies for each region to determine how they compare in four categories: **Destination Marketing, Community Engagement, Destination Management and Organization Operations.**

The table below illustrates the divergence by comparing how the strategic focus in each region compares with the others. Africa and the Middle East are not reported due to a lack of statistical data.

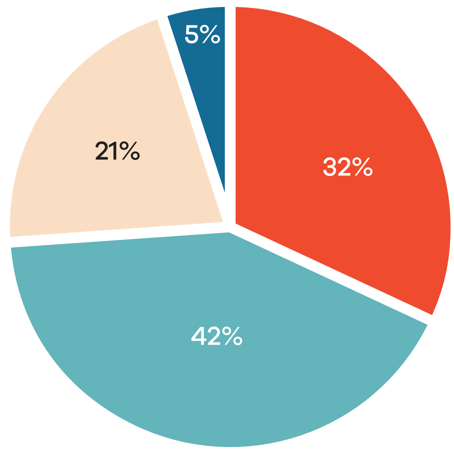
### Strategic Priorities – Ranking of Importance by Region

| | Canada/U.S. | Europe | Latin America | Asia Pacific |
|---|---|---|---|---|
| Strategic Category | | | | |
| Destination Marketing | 1st | 3rd | 2nd | 1st |
| Community Engagement | 2nd | 2nd | 4th | 2nd |
| Destination Management | 3rd | 1st | 1st | 4th |
| Organization Operations | 4th | 4th | 3rd | 3rd |

## Canada & U.S.




## Europe




Destination Marketing

Community Engagement

Destination Management

Organization Operations

\# Percentage of top 20 trends

Marketing strategies make up the largest portion of the top 20 strategies for North America, with a continued focus on mobile channel visitor engagement, content marketing and video development.

The second top priority for Canadian and U.S. destination organizations is enhancing engagement with their local communities to manage future tourism considerations. This is a testimony to the growing need for destination leaders to prioritize community engagement strategies that connect the local tourism industry with all stakeholders.

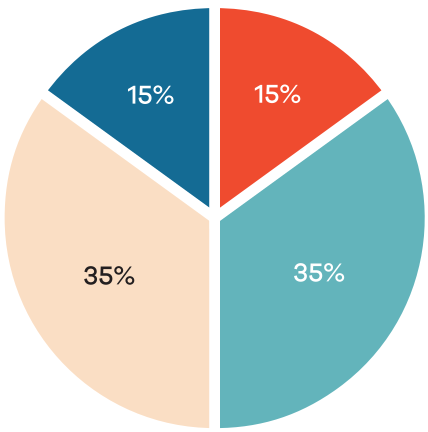
Canadian and U.S. organizations are also investing more resources in destination management, such as developing a tourism master plan to balance economic growth and quality of life. They are also increasingly leveraging their industry economic clusters to develop business event opportunities and expand strategic alliances.

Destination marketing and stronger alliances with key economic clusters made up the largest portion of the top 20 European strategies, with a primary focus on generating business event development.

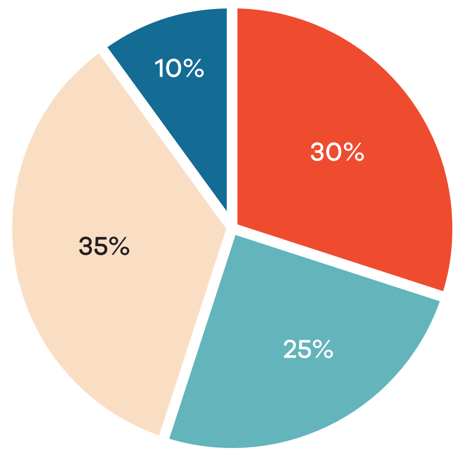
Reflecting growing concerns in Europe about high visitor compression, four of the top six strategic imperatives for European destination organizations focused on destination management. Environmental sustainability and quality of life for local residents were ranked extremely high, and there is widespread interest in creating tourism master plans.

European organizations have responded to rising public and political commentary about the impact of the visitor economy by prioritizing community engagement strategies. They're also prioritizing investments in data analysis tools and competencies, particularly as they relate to the generation of business intelligence about their destination.

## Latin America




## Asia Pacific





# Percentage of top 20 trends

Latin American organizations prioritized destination marketing and management strategies equally, with an emphasis on sustainable development and security. They also prioritized destination development projects and policy development to ensure the delivery of authentic destination experiences.

The primary marketing and management strategies included how their national brand plays a role in driving growth, building stronger alliances with national airlines, and increasing relationship development with local economic clusters. Latin American leaders also prioritized operational strategies, including the use of digital systems to source business intelligence.

Community engagement strategies ranked the lowest of all categories, although the use of economic impact studies was identified as a key imperative.

Asia Pacific destination organizations prioritized marketing strategies most, with an emphasis on helping business event customers establish their long-term legacies and connect with local knowledge networks.

Community engagement priorities focused on the integration of opportunities between business events, economic development and talent attraction. Destination leaders also called for more advocacy measures to further reduce barriers to travel.

Asia Pacific destination organizations are leaning into destination management strategies more. The primary focus is on responsible and sustainable development, as well as ensuring visitor experiences contribute to the quality of life for local residents. This includes Asia Pacific organizations getting more actively involved in broader economic development projects.

# DestinationNEXT Scenario Model & Assessment Tool

## Destination Strength and Community Alignment

**The DestinationNEXT Scenario Model and Assessment Tool measures the two key success factors for any destination:**

### Destination Strength

Relates to the overall quality of infrastructure in the destination, as well as the visitor experience, brand, capacity, access, technology, etc.

### Community Alignment

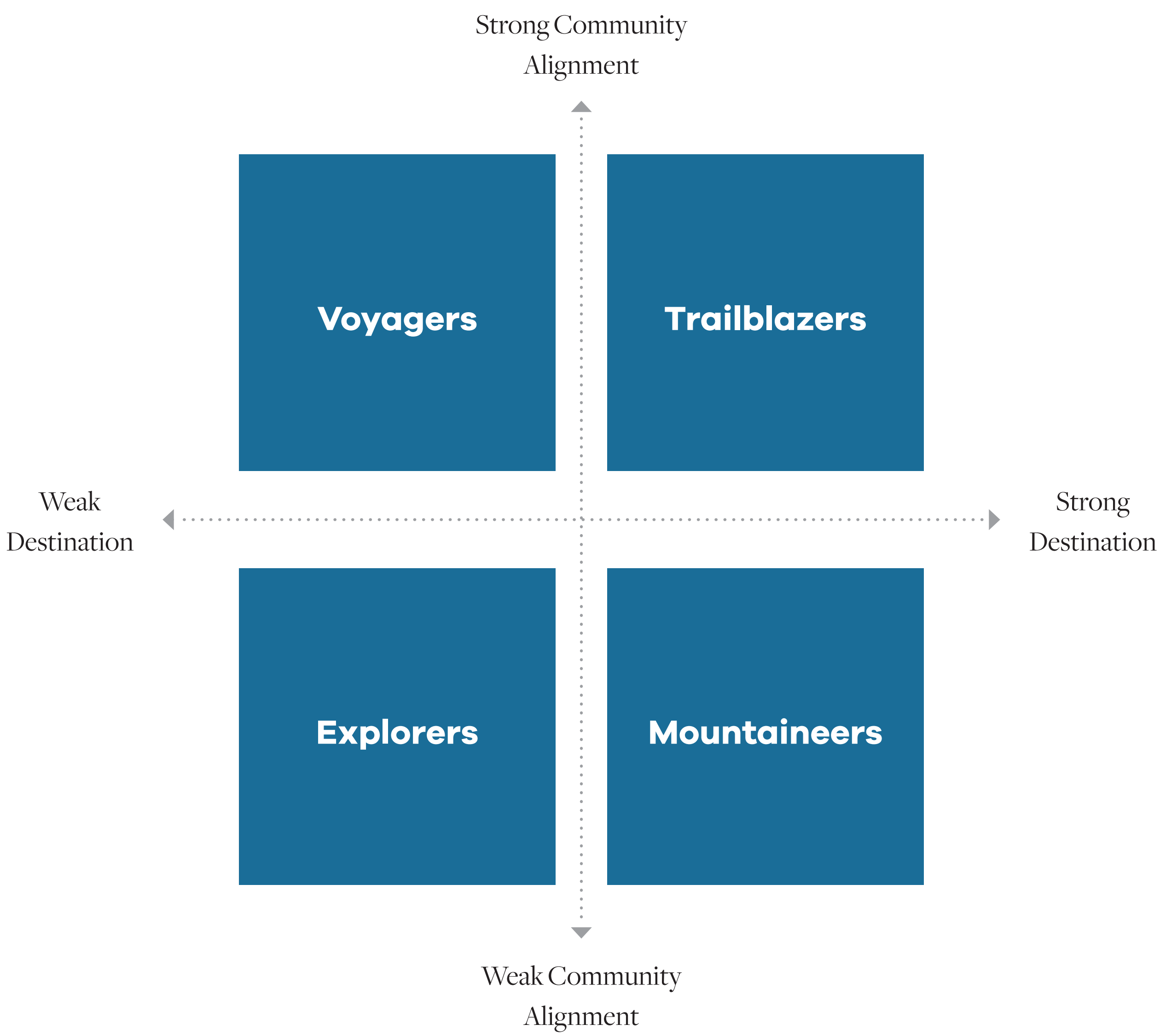
Relates to how local government, non-tourism business industry stakeholders and the residential community support the goals and initiatives of the destination organization.

We believe that these two success drivers are even more relevant today. (The second success driver in DestinationNEXT 2017 was Community Support & Engagement. It has been modified to Community Alignment in 2019.)

The DestinationNEXT Assessment Tool is a data-driven framework to help destination organizations and key stakeholders identify challenges and opportunities in their destination. They do so by ranking 20 variables across the two independent axes that determine the success of a region's visitor economy.

The survey results from the assessment are then used to plot the destination in the DestinationNEXT Scenario Model, consisting of four distinctly different scenarios. Every destination organization fits into one of these four quadrants. The premise of DestinationNEXT is that the priorities and strategies for destination organizations should vary depending on where they plot in one of the scenarios.

## Scenario Model



# Assessment Variables

## DESTINATION STRENGTH

- Brand
- Accommodation
- Attractions & Entertainment
- Conventions & Meeting Facilities
- Events
- Sports & Recreation Facilities
- Communication Infrastructure
- Mobility & Access
- Air Access
- International Readiness

## COMMUNITY ALIGNMENT

- Organization Governance Model
- Partnership Strength
- Industry Support
- Local Community Support
- Regional Cooperation
- Workforce
- Hospitality Culture
- Policy & Regulatory Environment
- Funding Support & Certainty
- Economic Development

“The Scenario Model and Assessment Tool help destination organizations leverage the DestinationNEXT Futures Study and provide a forum for community engagement.”

## Findings to Date

The Scenario Model and Assessment Tool helps destination organizations leverage the DestinationNEXT Futures Study and provide a forum for community engagement and regional collaboration. More than 200 destinations worldwide have already completed a detailed assessment.

The feedback from communities that have proceeded through the assessment has been very positive. Also, the survey data from the 2019 Futures Study confirms the critical importance of the two success drivers: Destination Strength and Community Alignment.

Each destination faces a different set of issues that need to be addressed. However, the most common challenges facing many destinations today are:

### Destination Strength:

- Transportation and mobility
- Meeting and convention space capacity
- Air access

### Community Alignment:

- Workforce
- Funding support and certainty
- Resident support

# Appendices

A. **Full List of 52 Trends**

B. **Full List of 64 Strategies**

C. **Strategy Variances by Mandate**

D. **Additional Survey Questions**

E. **DestinationNEXT Advisory Council**

F. **Advisory Panel Members**

G. **Survey Participants**

Appendix A

# 52 Trends

| | |
|---|---|
| 1. Customers increasingly seeking a unique, authentic travel experience. | ▲2 |
| 2. Content creation and dissemination by the public across all platforms drives the destination brand and experience. | 0 |
| 3. Social media's increasing prominence in reaching the travel market. | ▼2 |
| 4. Video becomes the new currency of destination marketing and storytelling. | ▲2 |
| 5. Harvesting data and developing business analytics differentiate successful tourism enterprises and destinations. | ▲2 |
| 6. Mobile devices and apps becoming the primary engagement platform for travelers. | ▼1 |
| 7. Travelers demanding more information, control, interaction and personalized information. | ▲10 |
| 8. Customers increasingly expect highly curated and customized destination content. | ▲5 |
| 9. Smart technology creating new opportunities for innovative new services and processes. | ▼1 |
| 10. Geotargeting and localization becoming more prevalent. | 0 |
| 11. Communities more engaged in the development and management of the destination experience. | ▲13 |
| 12. Increasing importance of transparency and building partnerships to secure business to a destination. | ▲39 |
| 13. Organizations are increasingly developing strategic alliances across multiple economic sectors in order to leverage resources. | ▼2 |
| 14. More communities and municipal governments are aware of importance of tourism to local economy and job growth. | New |
| 15. Air access to a destination is a key factor in attracting business. | ▲1 |
| 16. Travelers are seeking more personal enrichment, including wellness and wellbeing. | New |
| 17. Destinations are looking at sustainability much more broadly, encompassing economic, social and environmental impacts. | New |
| 18. More third-party information providers aggregating content about destinations. | ▲23 |
| 19. Peer-to-peer buyer influence driving customer purchases. | ▲10 |
| 20. The brand of a destination becoming a more important factor for destination decisions. | ▼6 |
| 21. Governments dealing with tourism from an integrated, multidepartmental perspective that is focused on economic development. | ▲7 |
| 22. Technology makes travel products and services more transparent to the customer. | ▲1 |
| 23. More information clutter and noise about destinations occurring in the marketplace. | ▲31 |

| | |
|---|---|
| 24. Young travelers are more aware of their impact on the communities and enviornment they visit. | New |
| 25. Influencer marketing is becoming an increasingly essential component of the destination marketing mix. | New |
| 26. Business event customers looking for better collaboration with destinations and supplier to achieve greater business outcomes. | New |
| 27. Governments facing pressure to reduce or eliminate financial subsidies to the tourism sector. | ▼15 |
| 28. Business events increasingly shifting to be regarded as agents of long-term economic development for communities. | ▲7 |
| 29. Labor and skill shortages increasingly being felt in sectors of the tourism industry. | ▲4 |
| 30. Disruption, in the form of changing business models, terrorism, pandemics, or natural disasters, will increasingly impact how destinations think and act. | ▼8 |
| 31. Combined business and leisure travel becoming more popular. | ▲25 |
| 32. Short-stay trips and mini vacations becoming increasingly popular. | ▼5 |
| 33. Meeting planners are increasingly booking smaller midsize cities for business events. | New |
| 34. Millennial segment takes over the baby boomers influence on the market. | 0 |
| 35. Hotel taxes increasingly vulnerable to alternative politically based projects. | ▼17 |
| 36. The market moving towards a “shared economy” with assets being rented or bartered, outside of traditional commercial arrangements. | ▼10 |
| 37. Rising middle class in emerging economies providing opportunities for global consumer markets. | New |
| 38. Customers going directly to suppliers for goods and services. | ▲19 |
| 39. Short-term rentals are increasingly attracting event attendees and diminishing use of room blocks. | New |
| 40. Subsidies and incentives being required to attract new air routes/services. | ▼2 |
| 41. Meeting planners are asking more for subvention funds. | New |
| 42. Safety and security risks hampering destination decisions. | ▼3 |
| 43. Political instability creating a growing threat to destination appeal in certain markets. | ▼12 |
| 44. Short-term rentals are having a growing impact on declining long-term workforce housing. | New |
| 45. Artificial intelligence will become increasingly important in managing customer relationships. | ▼2 |
| 46. Government policies creating more restrictions to the flow of travel from country-to-country. | ▼9 |
| 47. Visa waiver programs reducing barriers to entering some countries. | ▼2 |
| 48. Augmented reality will elevate the visitor experiences in the near future. | New |
| 49. Aging populations in Europe and North America are impacting the type of experiences expected. | New |
| 50. Overtourism is becoming a significant local issue. | New |
| 51. More destinations see bike/scooter-sharing platforms as viable options for visitor transportation. | New |
| 52. Destinations are increasingly looking at autonomous vehicles to address high traffic concerns. | New |

# 64 Strategies

| | |
|---|---|
| 1. My destination organization will enhance our engagement with the local community to manage future tourism considerations. | ▲5 |
| 2. My destination organization will play more of a central role in advocacy in my destination. | ▲3 |
| 3. My destination organization will focus significant attention to content creation and dissemination strategies. | ▼1 |
| 4. My destination organization will invest more effort and resources into video content to market the destination. | ▼3 |
| 5. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations. | ▲10 |
| 6. My destination organization will act as conduit to build social networks among our local business community. | ▲33 |
| 7. My destination will focus on developing authentic experiences for the customer. | ▼4 |
| 8. My destination will have a tourism master plan to define long-term destination development. | NEW |
| 9. My destination organization will design digital customer engagement primarily around mobile platforms. | ▼1 |
| 10. The economic impact of tourism and conventions will be better understood in my destination. | ▲2 |
| 11. My destination will better integrate tourism, economic development and talent attraction. | NEW |
| 12. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics. | ▲19 |
| 13. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact. | ▲3 |
| 14. My destination organization will form more strategic alliances outside the tourism industry. | 0 |
| 15. My destination will develop strategies to protect what we have while attracting events and visitation to our community. | ▼8 |
| 16. My destination will develop ways to connect with customers through all stages of their experience from awareness to interest to booking to visiting to post-visit. | ▼12 |
| 17. My destination organization will balance the need for growth with responsible and sustainable development. | ▲11 |
| 18. My destination organization will develop outreach programs in our local community to broaden our networks. | NEW |
| 19. My destination organization will leverage our region's priority sectors to generate business. | NEW |
| 20. My destination organization will be more involved in economic development initiatives. | ▼10 |

| | |
|---|---|
| 21. My destination organization will place greater emphasis on engaging with customers in two-way conversations, more so than one-directional communication. | ▼12 |
| 22. My destination organization will acquire competencies and skillsets to effectively compete in a disruptive economy. | ▲2 |
| 23. My destination organization will participate more in building platforms to improve the visitor experience. | 0 |
| 24. My destination organization will connect visitor experience with the quality of life of residents in my community. | ▼11 |
| 25. My destination organization will put a greater emphasis on market segmentation. | ▼8 |
| 26. My destination organization will consider ways to measure the longer-term social, cultural and environmental impacts of tourism and business events. | ▲6 |
| 27. My destination organization will have a greater role in policy and product development. | ▼1 |
| 28. My destination organization will develop new business development strategies to refocus on the millennial market. | ▼17 |
| 29. My destination will put in place digital systems and services to keep pace with customer demand. | ▲1 |
| 30. My destination organization will invest more effort in scanning markets for business intelligence. | ▼11 |
| 31. My destination organization will engage more closely with non-traditional stakeholders. | ▼10 |
| 32. My destination organization will invest in tools and talent to manage/analyze large and complex data for my destination. | ▲4 |
| 33. My destination organization will have strategies and policies related to diversity of people. | ▲1 |
| 34. My destination will pay close attention to safety and security as a strategic consideration in our future planning. | ▼12 |
| 35. My destination organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination. | ▼10 |
| 36. My destination organization will manage content across digital channels on behalf of community stakeholders. | ▼1 |
| 37. My destination organization will engage in scenario planning to help be prepared for future disruptions and opportunities. | ▲12 |
| 38. My destination organization will take on a greater role as cultural champion of my destination. | ▼20 |
| 39. My destination organization will build our capacity as curators of the destination experience, while placing less emphasis on more traditional tourism promotions. | ▼12 |
| 40. My destination organization will have to secure new revenue sources to maintain current funding levels. | ▲3 |
| 41. My destination organization and industry will take a more active role in political and legislative issues impacting events. | ▼21 |
| 42. My destination will work closely with associations to help them achieve their legacy objectives. | ▲2 |
| 43. My destination organization will actively encourage policy makers to reduce barriers to travel. | ▼14 |
| 44. My destination organization will have strategies to address a new generation in the workforce. | ▼7 |
| 45. Collaborative technology will be a core strategy for my destination organization. | ▼12 |

| | |
|---|---|
| 46. My destination organization will increasingly collaborate with local community organizations to address social issues. | New |
| 47. My destination organization will partner with a greater number of competitive destinations. | 0 |
| 48. My destination organization will have more non-industry representatives providing direction and expertise to our planning. | ▲4 |
| 49. My destination organization will work more closely with airlines to generate business for my destination. | ▼9 |
| 50. My destination organization will play a greater role in the creation of events, to animate the destination. | 0 |
| 51. My destination organization will implement visitor dispersal strategies to spread tourism benefits to a broader region. | New |
| 52. My destination organization and destination will become increasingly involved in capacity management, delivering high quality experiences to fewer guests | ▲1 |
| 53. My destination organization will take a lead role in our community on working with the sharing economy, including participating in discussions on regulatory matters. | ▼11 |
| 54. My national tourism organization will encourage local destination brands in my country. | ▼8 |
| 55. My destination will encourage my national brand to play a bigger role than it does today in marketing the country as a place to visit and hold meetings. | ▼17 |
| 56. Place marketing entities will come together under a singular approach in my destination. | ▼11 |
| 57. My destination organization will hire destination managers, as well as those with backgrounds in sales and marketing. | ▼16 |
| 58. My destination will link funding for my destination organization to performance criteria. | ▼10 |
| 59. The brand of my destination will be defined by the community. | ▼8 |
| 60. My destination will develop products and experiences for an older market demographic. | New |
| 61. My destination organization will develop organization skills in event design. | New |
| 62. My destination organization will lead and support initiatives to address hospitality industry workforce shortages. | New |
| 63. My destination organization will take a more direct involvement risk assessment and mitigation strategies for business events. | ▼8 |
| 64. My destination will proactively develop strategies to mitigate the impact of overtourism. | New |

Appendix C

# Strategy Variances by Mandate

## Leisure Travel and Business Events

The DestinationNEXT 2019 survey asked destination organizations to categorize their primary market segment(s) in one of three categories: 1) leisure travel and business events, 2) primarily leisure travel, or 3) primarily business events.

From the latter two categories, the top 20 strategies for destination organizations with a singular market focus are listed in this section.

## Top 20 Strategies for Leisure Travel-Focused Organizations

1. My destination organization will invest more effort and resources into video content to market the destination.
2. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations.
3. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics.
4. My destination organization will enhance our engagement with the local community to manage future tourism considerations.
5. My destination will focus on developing authentic experiences for the customer.
6. My destination organization will act as a conduit to build social networks among our local business community.
7. My destination will have a tourism master plan to define a long-term destination development direction.
8. My destination organization will focus significant attention on content creation and dissemination strategies.
9. My destination will take steps to better integrate tourism, economic development and talent attraction.
10. My destination will develop strategies to protect what we have while attracting events and visitation to our community.
11. My destination organization will manage content across digital channels on behalf of community stakeholders.
12. My destination organization will play a more central role in advocacy in my destination.
13. My destination will develop ways to connect with customers through all stages of their experience, from awareness to interest to booking to visiting to post-visit.
14. My destination organization will design digital customer engagement primarily around mobile platforms.
15. My destination organization will develop outreach programs in our local community to broaden our networks.
16. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact.
17. My destination organization will take on a greater role as the cultural champion of my destination.
18. My destination organization will balance the need for growth with responsible and sustainable development.
19. My destination organization will place greater emphasis on engaging with customers in two-way conversations more so than one-directional communication.
20. My destination organization will build our capacity as the curator of the destination experience while placing less emphasis on more traditional tourism promotions.

## Top 20 Strategies for Business Event–Focused Organizations

1. My destination organization will consider ways to measure the longer-term social, cultural and environmental impacts of tourism and business events.
2. My destination will have a tourism master plan to define long-term destination development direction
3. My destination organization and destination have a key responsibility to protect and steward our natural environment and our authentic social and cultural characteristics.
4. My destination organization will play a more central role in advocacy in my destination.
5. My destination organization will place a greater emphasis on connecting business event customers with intellectual capabilities and knowledge networks in my destination.
6. My destination organization will leverage our destination's priority industry sectors to generate business.
7. My destination organization and destination will become increasingly involved in capacity management, delivering high-quality experiences to fewer guests.
8. My destination organization will form more strategic alliances outside the destination organization industry.
9. My destination organization will acquire competencies and skill sets to effectively compete in a disruptive economy.
10. My destination organization will balance the need for growth with responsible and sustainable development.
11. My destination organization will adopt operating standards and consistent measures of performance with other destination organizations.
12. My destination organization will be more involved in broader economic development projects and initiatives.
13. My destination organization will enhance our engagement with the local community to manage future tourism considerations.
14. My destination organization will agree to a uniform methodology with other destination organizations to measure economic impact.
15. My destination will develop strategies to protect what we have while attracting events and visitation to our community.
16. My destination organization will act as a conduit to build social networks among our local business community.
17. The economic impact of tourism and conventions will be better understood in my destination.
18. My destination will pay close attention to safety and security as a strategic consideration in our future planning.
19. My destination organization will place greater emphasis on engaging with customers in two-way conversations more so than one-directional communication.
20. My destination organization will engage in scenario planning to help be prepared for future disruptions and opportunities.

Appendix D

# Additional Survey Questions

## Defining the Future of Destination Marketing and Management

**Please describe your organization's primary roles five years from now**

| | Average Scores | Rank |
|---|---|---|
| Brand/marketing | 1.65 | 1 |
| Meetings and conventions sales | 1.82 | 2 |
| Other | 1.88 | 3 |
| Leisure sales (tour/independent) | 1.89 | 4 |
| Venue manager/operator | 2.00 | 5 |
| Destination/product development | 2.15 | 6 |
| Industry advocate | 2.16 | 7 |
| Destination information resource | 2.21 | 8 |
| Convention services | 2.22 | 9 |
| Broader economic development | 2.23 | 10 |
| Major event partner/developer | 2.43 | 11 |
| Visitor experience servicing | 2.44 | 12 |

| | Region/Location | | | | | Organizational Role | | |
|---|---|---|---|---|---|---|---|---|
| | Asia | Canada | Europe | Latin America | United States | Both | Leisure | Business |
| Brand/marketing | 6 | 3 | 3 | 4 | 1 | 1 | 2 | 6 |
| Meetings and conventions sales | 4 | 1 | 4 | 1 | 2 | 3 | 3 | 3 |
| Other | 0 | 5 | 1 | 10 | 3 | 4 | 12 | 1 |
| Leisure sales (tour/independent) | 1 | 4 | 2 | 2 | 3 | 4 | 1 | 1 |
| Venue manager/operator | 10 | 0 | 0 | 3 | 3 | 2 | 10 | 7 |
| Destination/product development | 8 | 7 | 4 | 9 | 7 | 6 | 6 | 11 |
| Industry advocate | 9 | 10 | 10 | 7 | 3 | 9 | 3 | 5 |
| Destination information resource | 7 | 2 | 7 | 5 | 10 | 11 | 3 | 4 |
| Convention services | 5 | 5 | 8 | 6 | 11 | 8 | 10 | 10 |
| Broader economic development | 2 | 9 | 9 | 8 | 9 | 7 | 9 | 9 |
| Major event partner/developer | 11 | 11 | 11 | 11 | 8 | 10 | 7 | 12 |
| Visitor experience servicing | 2 | 8 | 4 | 12 | 12 | 12 | 7 | 8 |

### If you were to start/establish a new destination organization, what would the primary roles be?

| | Average Scores | Overall Rank |
|---|---|---|
| Brand/marketing | 1.56 | 1 |
| Leisure sales (tour/independent) | 1.86 | 2 |
| Destination/product development | 1.94 | 3 |
| Convention services | 2.00 | 4 |
| Meetings and conventions sales | 2.04 | 5 |
| Industry advocate | 2.17 | 6 |
| Destination information resource | 2.18 | 7 |
| Venue manager/operator | 2.18 | 8 |
| Other | 2.22 | 9 |
| Major event partner/developer | 2.22 | 10 |
| Broader economic development | 2.27 | 11 |
| Visitor experience servicing | 2.51 | 12 |

### How would you see the revenue sources in your organization's annual budget change five year's from now?

(1 - Significantly Decrease; 5 - Significantly Increase)

(Rank: 1 - Largest Increase; 12 - Largest Decrease)

| | Average Scores | Overall Rank |
|---|---|---|
| Sponsorship/partnerships/programs | 3.90 | 1 |
| Room Tax | 3.86 | 2 |
| Tourism Improvement District Funding (Business Levy) | 3.83 | 3 |
| Destination Marketing Services (e.g. research, event management) | 3.72 | 4 |
| Other | 3.64 | 5 |
| Destination Marketing Fee (Consumer Levy) | 3.48 | 6 |
| Venue Rentals/Associated Revenues | 3.46 | 7 |
| Membership Dues | 3.40 | 8 |
| Sales Commissions | 3.33 | 9 |
| Food & Beverage Tax | 3.31 | 10 |
| Car Rental Tax | 3.30 | 11 |
| Direct Government Budget Allocation | 3.30 | 12 |

| | Region/Location | | | | | Organizational Role | | |
|---|---|---|---|---|---|---|---|---|
| | Asia | Canada | Europe | Latin America | United States | Both | Leisure | Business |
| Brand/marketing | 3 | 1 | 4 | 1 | 1 | 1 | 2 | 4 |
| Leisure sales (tour/independent) | 11 | 3 | 4 | 2 | 2 | 2 | 1 | 5 |
| Destination/product development | 4 | 2 | 7 | 5 | 3 | 3 | 3 | 3 |
| Convention services | 5 | 11 | 2 | 5 | 8 | 6 | 4 | 1 |
| Meetings and conventions sales | 5 | 3 | 8 | 3 | 5 | 5 | 4 | 2 |
| Industry advocate | 2 | 9 | 11 | 4 | 6 | 8 | 6 | 5 |
| Destination information resource | 9 | 10 | 10 | 7 | 4 | 4 | 9 | 10 |
| Venue manager/operator | 5 | 12 | 12 | 10 | 7 | 7 | 0 | 5 |
| Other | 12 | 3 | 1 | 12 | 11 | 9 | 0 | 5 |
| Major event partner/developer | 1 | 3 | 9 | 8 | 10 | 11 | 7 | 5 |
| Broader economic development | 5 | 8 | 6 | 9 | 9 | 10 | 8 | 11 |
| Visitor experience servicing | 10 | 7 | 2 | 11 | 12 | 12 | 10 | 12 |

| | Region/Location | | | | | Organizational Role | | |
|---|---|---|---|---|---|---|---|---|
| | Asia | Canada | Europe | Latin America | United States | Both | Leisure | Business |
| Sponsorship/partnerships/programs | 2 | 2 | 2 | 2 | 2 | 2 | 3 | 1 |
| Room Tax | 1 | 1 | 6 | 3 | 3 | 1 | 4 | 8 |
| Tourism Improvement District Funding (Business Levy) | 7 | 5 | 3 | 6 | 1 | 3 | 5 | 4 |
| Destination Marketing Services (e.g. research, event management) | 4 | 4 | 4 | 1 | 5 | 5 | 1 | 2 |
| Other | 12 | 5 | 1 | 5 | 4 | 4 | 8 | 9 |
| Destination Marketing Fee (Consumer Levy) | 5 | 12 | 7 | 7 | 6 | 8 | 7 | 3 |
| Venue Rentals/Associated Revenues | 9 | 8 | 8 | 4 | 8 | 6 | 6 | 5 |
| Membership Dues | 11 | 3 | 5 | 8 | 11 | 10 | 9 | 6 |
| Sales Commissions | 8 | 5 | 9 | 9 | 12 | 7 | 9 | 11 |
| Food & Beverage Tax | 3 | 9 | 10 | 12 | 9 | 11 | 1 | 12 |
| Car Rental Tax | 9 | 9 | 10 | 10 | 10 | 9 | 11 | 10 |
| Direct Government Budget Allocation | 6 | 9 | 12 | 11 | 7 | 12 | 12 | 7 |

### What will your organization's primary expected measure of success be five years from now?

| | Average Scores | Overall Rank |
|---|---|---|
| Room-nights generated | 1.61 | 1 |
| Number of delegates | 1.71 | 2 |
| Overnight visitation | 1.81 | 3 |
| Leads/referrals to business | 1.86 | 4 |
| Economic Impact of Tourism | 1.86 | 5 |
| Hotel Performance Metrics | 2.05 | 6 |
| Marketing ROI | 2.07 | 7 |
| Media stories | 2.15 | 8 |
| Visitor satisfaction | 2.22 | 9 |
| Conversion metrics | 2.29 | 10 |
| Social impacts/Quality of life | 2.34 | 11 |
| Venue operating profits | 2.38 | 12 |
| Other | 2.44 | 13 |
| Social Media Metrics | 2.44 | 13 |
| Visitor servicing | 2.50 | 15 |
| Membership satisfaction | 2.55 | 16 |
| Environmental impacts | 2.63 | 17 |
| Direct Government Budget Allocation | 3.30 | 12 |

# Appendix E

## DestinationNEXT Advisory Council

Destinations International and MMGY NextFactor would like to thank the members of the DestinationNEXT Advisory Council, which was established to lead this important industry initiative. Special thanks to Advisory Council co-chairs: Scott Beck and Lyn Lewis-Smith.

**Scott Beck - Co-Chair**
President & CEO
Visit Salt Lake

**Lyn Lewis-Smith – Co-Chair**
CEO
BESydney

**Jaime Andrés Alfaro de Castro**
Director, Office of Tourism,
Barranquilla, Colombia

**Tammy Blount-Canavan**
President & CEO
Monterey County CVB

**David Dubois**
President & CEO
IAAE

**Dan Fenton**
Global Tourism Director
JLL

**Dario Flota**
Director General
Quintana Roo Tourism Board

**Maura Gast**
Executive Director
Irving Texas CVB

**Shelly Green**
President & CEO
Durham CVB

**Bryan Grimaldi**
Greenberg Traurig, LLP
(Former NYC & Company)

**Andrew Hiebl**
CEO
Association of Australian Convention Bureaux

**Anja Loetscher**
Former Director
Geneva Convention Bureau

**Marsha Massey**
Executive Director
Olympic Peninsula Visitor Bureau

**David Peacock**
CEO
Regional Tourism Organization 4, Ontario

**Annette Rummel**
President & CEO
Great Lakes Bay Regional CVB

**Martha Sheridan**
President & CEO
Greater Boston Area CVB

**Karen Williams**
President & CEO
Louisville Tourism

**Berkeley Young**
Owner & President
Young Strategies

# Appendix F

## Advisory Panel Members

### Industry Disruptors

**Cree Lawson**
Arrivalist

**Darren Dunn**
Adara

**Dan Berger**
Cvent/Social Tables

**Dan Burress**
Burress Research

**Sherrif Karamat**
PCMA

**David Dubois**
IAEE

**Kelly Covato**
Facebook

**Mike Gamble**
SearchWide

### Industry Clients

**Lisa Astorga**
Int'l. Society on Thrombosis & Haemostasis

**Valerie Guillet**
Societe Internationale d'Urologie

**Robin Preston**
American Chemical Society

**Nisan Bartov**
CongressMed

**Ben Hainsworth**
K.I.T. Group

**Melissa Rawak**
Association for Financial Professionals

**Tracy Bury**
World Confederation for Physical Therapy

**Stuart Ruff**
RIMS

**Sue Dykema**
American Society for Aesthetic Plastic Surgery

**Hari Nair**
Expedia Inc.

**Luca Segantini**
International Society of Nephrology

**Nelson Fabian**
Center for Priority Based Budgeting Institute

**Douglas Olover**
South African Pharmacology Society

**Shannon Stowell**
Adventure Travel Trade Association

**John Folks**
Minding Your Business

**Michael Payne**
SmithBucklin

**David Peckinpaugh**
Maritz Travel Company

## Community Leaders

**Julie Curtain**
Development Counsellors International

**Jeff Finkle**
International Economic Development Council

**Omar Nawaz**
United Nations World Tourism Organization

**Terestella González Denton**
Sistema Universitario Ana G Mendez

**Harmony Lamm**
United Nations World Tourism Organization

**Brian Payne**
Central Indiana Community Foundation

**Deborah Edwards**
University of Technology Sydney

**Christopher Leinberger**
George Washington University

**Helen Marano**
World Travel & Tourism Council

## Destination Leaders

**John Lambeth**
Civitas

**Peter Yesawich**
MMGY Global

**Adam Sacks**
Tourism Economics

**Brian Grimaldi**
Greenberg Traurig LLC

**Steve Paganelli**
TripAdvisor

**Julie Hart**
CFO by Design

**Joe Veneto**
Veneto Collaboratory

**Mickey Schaefer**
Mickey Schaefer & Associates

# Appendix G

## Survey Participants

### Albania
DMO Albania

### Argentina
Alegra Consulting
Andrea Juncos & Asoc.
AOCA
Buenos Aires Convention & Visitors Bureau
Córdoba Convention & Visitors Bureau
Iguazu Convention Bureau
Rosario Convention & Visitors Bureau

### Australia
Adelaide Convention Bureau
BESydney
Brisbane Marketing
Business Events Tasmania
Destination Gold Coast
Mackay Entertainment and Convention Centre
Melbourne Convention Bureau
Northern Territory Convention Bureau
Tourism Tropical North Queensland

### Belgium
visit.brussels

### Brazil
Alvo Eventos
Arx Eventos
Cataratas do Iguaçu S.A
Convention & Visitors Bureau de João Pessoa
Convention Bureau de Maringá
Espirito Santo Convenction e Visitors Bureau
Federação de Convention & Visitors Bureaux do Estado do Rio de Janeiro
FIERGS Exhibition & Convention Center
Gramado, Canela Convention & Visitors Bureau Região das Hortênsias
Guarujá Convention &Visitors Bureau
ICMBio
Ifah Consulting
Instituto Federal da Bahia
itaipu binacional
LCB Consultoria
Martin Travel
Parque das Aves
Recife Convention & Visitors Bureau
Rio Convention & Visitors Bureau
Salvador Destination
Sebrae
SENAC

### Canada
Banff & Lake Louise Tourism
Cariboo Chilcotin Coast Tourism Association
Discover Halifax
Edmonton Tourism
Haliburton Forest and Wild Life Reserve Ltd.
Lanark County
Meetings + Conventions Calgary
Haliburton County
Ottawa Tourism
Ottawa Valley Tourist Association
Parksville Qualicum Beach Tourism
Perth Museum
RTO4 Inc.
Tourism Abbotsford
Tourism Barrie
Tourism Burlington
Tourism Burnaby
Tourism Jasper
Tourism Kamloops
Tourism Kelowna
Tourism Richmond
Tourism Saskatoon
Tourism Toronto
Tourism Windsor Essex Pelee Island
Travel Alberta
Travel Manitoba
Waterloo Regional Tourism Marketing Corporation

**Chile**
CMC Event
Magix Group
SERNATUR
Viña del Mar Convention Bureau

**China**
SMG

**Colombia**
3K Events
Ágata RRPP y Management SAS
Baluarte cartagena
BC Hoteles SA
Bureau de Convenciones de Bogotá
Camara de Comercio de Barranquilla
Cámara de Comercio de Cartagena
Cartagena de Indias Convention and Visitors Bureau
Clúster Turismo de Negocios
Comunicaciones Efectivas
ESENTTIA
Greater Medellín Convention & Visitors Bureau
Incentivamos Colombia
ProBarranquilla
Soundwalkrs S.A.
Todomar
Universidad del Magdalena
University of Cartagena

**Costa Rica**
Instituto Costarricense de Turismo

**Cuba**
Facultad de Turismo Universidad de la Habana

**Denmark**
VisitAarhus
Wonderful Copenhagen

**Dominican Republic**
Turenlaces del Caribe, S.R.L

**Ecuador**
Quito Turismo

**El Salvador**
Eco Mayan DMC
Independiente

**Estonia**
Estonian Convention Bureau

**Finland**
Finland Convention Bureau
Helsinki Marketing

**France**
Lyon Convention & Visitors Bureau

**Germany**
Dresden Marketing Gesellschaft
Düsseldorf Marketing GmbH
German Convention Bureau
Stuttgart Tourism
visitBerlin Berlin Convention Office

**Greece**
Athens Convention & Visitors Bureau
TCB Thessaloniki Convention Bureau

**Guatemala**
Buró de Convenciones de Guatemala
Consultora Independiente
Grupo Gala
INGUAT
Organizacion, S.A.

**Honduras**
Buró de Convenciones
EVENTIA
Secretaria de Turismo de Honduras

**Iceland**
Meet in Reykjavík

**Ireland**
Dublin Convention Bureau

**Israel**
Tel Aviv Global

## Italy

Bologna Convention Bureau
Destination Florence CVB
Italian Exhibition Group
Tourism Board Bolzano Bozen

## Japan

Chiba Convention Bureau
Okinawa Convention & Visitors Bureau
Osaka Convention and Tourism Bureau
Sapporo Convention Bureau
Suruga Marketing & Tourism Bureau

## Jordan

Jordan Tourism Board

## Macau

Macau Government Tourist Office

## Malaysia

Sarawak Convention Bureau

## Mexico

Admission Organizacion de Eventos
Arena Turismo y Transporte
Buró de Convenciones y Visitantes de Ciudad Juárez
Cancun International Convention Center
Casona De San Miguel de Allende
Centro de Información Turística el Chamizal
Clúster de Turismo de Nuevo León (Monterrey)
Comite de Turismo y Convenciones de Tijuana
Consejo de Promocion Turistica de Quintana Roo
Convenciones Puebla
Corporación para el Desarrollo Turístico de Nuevo León
DMC Monterrey
Fideicomiso de Turismo de Los Cabos
Fidetur San Luis Potosi
Universidad de Monterrey
Grand Velas Riviera Maya
Los Cabos Tourism Board
OCC Queretaro
OCV Chiapas
OCV Puerto Vallarta
OFVC Guadalajara
Secretaría de Turismo de Guanajuato
Universidad de Quintana Roo
Universidad del Valle de México, Veracruz

## Monaco

Monaco Convention Bureau

## Montenegro

National Tourism Organisation of Montenegro/ Montenegro Convention Bureau

## Netherlands

Netherlands Board of Tourism & Conventions
The Hague Convention Bureau

## New Zealand

Auckland Convention Bureau
Tourism New Zealand

## Norway

VisitOSLO Convention Bureau

## Panama

Asociación Panameña de Profesionales en Congresos, Exposiciones y Afines

## Paraguay

Asunción Convention Bureau

## Peru

Canatur Perú
Lima Convention and Visitors Bureau

## Poland

Polish Tourism Organisation - Convention Bureau

## Rwanda

Rwanda Convention Bureau

## Serbia

Serbia Convention Bureau

## Slovakia

Bratislava Tourist Board

## South Africa

South African Tourism
Goyang CVB

Gyeongju Hwabaek Convention Bureau
Institute of Convention & Exhibition Management

**Spain**
Barcelona Convention Bureau
Malaga Convention Bureau
Sevilla Convention Bureau
Turisme de Barcelona
Zaragoza Turismo

**Sri Lanka**
MICE Sri Lanka

**Switzerland**
Bern Welcome
Lucerne Convention Bureau
Montreux Riviera Convention Bureau
Palazzo dei Congressi
Switzerland Convention & Incentive Bureau

**Thailand**
Thailand Convention & Exhibition Bureau

**Ukraine**
Department of Culture and Tourism of Odessa
DINADIS

**United Kingdom**
Aberdeen Convention and Events Bureau
Glasgow Convention Bureau
Hull & East Yorkshire Conferences
Liverpool Convention Bureau
London & Partners
Marketing Edinburgh
VisitBrighton
VisitBritain

**United States**
Arlington CVB
Athens CVB
Augusta Convention & Visitors Bureau
Bardstown Nelson County Tourism Commission
Boulder CVB
Breckenridge Tourism Office
Brookhaven CVB
Brown County CVB
Butler County Visitors Bureau
Cass County Visitors Bureau, Inc.
Central PA CVB
CincinnatiUSA Regional Tourism Network
City of Cathedral City
City of Columbia CVB
City of Montrose - Office of Business and Tourism
City of Pismo Beach CVB
Coastal Mississippi
Colorado Springs CVB
Colorado Tourism Office
Visit Charlotte
Dayton Convention & Visitors Bureau
Daytona Beach Area CVB
Decatur County Visitors Commission
Dekalb CVB
Destination Consultancy Group
Destination DC
Destination Irvine
Destination lancaster
Destination Madison
Destination Niagara USA
Destination Panama City
Digital Edge
Discover Durham
Discover Lehigh Valley
Discover Long Island
Discover Puerto Rico
Discover Schenectady
Discover The Palm Beaches
Door County Visitor Bureau
Dublin Convention & Visitors Bureau
Dubois County Visitor Center
DuPage CVB
Dutchess Tourism Inc
Elizabeth, NJ- DMO
Elkhart County, IN CVB
Evansville CVB
Experience Bryan College Station
Experience Columbia SC
Experience Grand Rapids
Experience Kissimmee
Experience Olympia & Beyond
Experience Scottsdale
Explore Asheville
Explore Charleston

Explore Fairbanks
Explore Minnesota
Explore St. Louis
Explore Utah Valley
eXplore Lawrence
Fox Cities CVB
Galveston Island CVB
GFLCVB
Gilroy Visitors Bureau, dba Visit Gilroy
Glacier Country Tourism
Global Meetings and Tourism Specialists, LLC
Great Falls Montana Tourism
Great Lakes Bay Regional CVB
Greater Green Bay CVBGreater Lansing CVB
Greater Miami CVB
Greater Newark CVB
Greater Palm Springs CVB
Greater Raleigh CVBu
Greater Wilmington Convention
Greensboro CVB
Hamilton County Tourism
Hancock County Tourism & Visitor Center
Hawaii Visitors and Convention Bureau
Hilton Head Island VCB
Hocking Hills Tourism Association
Houma Area CVB
Huntingdon County Visitors Bureau
Indiana Dunes Tourism
Indiana State Festivals Association
Irving CVB
Jackson County TDA
Johnston County Visitors Bureau
Judy Wood Solutions, LLC
Lake Erie Shores & Islands
Little Rock CVB
Los Angeles Tourism
Louisville Tourism
Maryland Office of Tourism
Mat-Su CVB
MC&A Inc
Meet Minneapolis
Meeting Incentive Experts
meetNKY
Memphis Tourism
Minneapolis Northwest Tourism
MMGY Global
Monroe-West Monroe CVB
Monterey County CVB
Mt. Pleasant Area CVB
Myrtle Beach CVB
Naples, Marco Island, Everglades CVB
New Orleans & Company
New Smyrna Beach Area Visitors Bureau
Newport Beach and Company
Noble County CVB
North Myrtle Beach Chamber and CVB
Ocean City, MD Department of Tourism
Ohio County Convention, Tourism and Visitors Commission
OKC CVB
Oklahoma City CVB
Oregon's Mt. Hood Territory
Paducah CVB
Pahrump Tourism
Palm Beach County TDC
Palm Coast and the Flagler Beaches
Pasadena CVB
PHLCVB
Plymouth County CVB
Pocono Mountains Visitors Bureau
Providence Warwick CVB
Pulaski County Tourism Bureau
Quad Cities CVB
Quinault Indian Nation
Roseville Visitors Association
RSCVA
Ruston Lincoln Parish CVB
San Francisco Travel Association
San Juan Islands Visitors Bureau
San Mateo County/Silicon Valley CVB
Seattle Southside Regional Tourism Authority
Sedona Chamber of Commerce
Senior Sales Manager
Shreveport-Bossier CTB
Snohomish County Tourism Bureau
Snowmass Tourism
SoIN Tourism
Sonoma County Tourism
Springfield CVB
Switzerland County Tourism
The Beaches of Fort Myers & Sanibel
Travel Juneau

Travel Lane County
Travel Oregon
Travel Paso
Travel Portland
Traverse City Tourism
Trumbull County Tourism
Tuolumne County Visitors Bureau
U.S. Travel Association
VAIL Valley Partnership
Visit Rochester
Virginia Beach CVB
Visit Albuquerque
Visit Anaheim
Visit Anchorage
Visit Augusta
Visit Aurora
Visit Austin
Visit Baltimore
Visit Baton Rouge
Visit Beloit
Visit Billings
Visit Bloomington
Visit Buffalo Niagara
Visit Cape
Visit Carlsbad
Visit Casper
Visit Central Florida
Visit Cheyenne
Visit Colorado Springs
Visit Concord
Visit Conroe
Visit Elizabeth City
Visit Estes Park
Visit Fort Collins
Visit Fort Wayne
Visit Fort Worth
Visit Franklin
Visit French Lick West Baden
Visit Hendricks County
Visit Indy
Visit Jacksonville
Visit KC
Visit Lafayette-West Lafayette
Visit Lake Charles
Visit Laredo, Texas
Visit Las Cruces
Visit Longmont
Visit Marshall County
Visit McMinnville
VISIT Milwaukee
Visit Mobile
Visit Morgan County
Visit Napa Valley
Visit Oakland
Visit Omaha
Visit Overland Park
Visit Oxnard
Visit Pensacola
Visit Plano
Visit Quad Cities
Visit San Antonio
Visit Santa Rosa
Visit Sarasota County
Visit Seattle
Visit SLO CAL
Visit Southlake (City of Southlake)
Visit Spokane
Visit Springfield
Visit Stillwater
Visit Stockton
Visit Tampa Bay
Visit Topeka
Visit Tri-Cities
Visit Tri-Valley
Visit Tucson
Visit Vacaville
Visit Valley Forge
Visit Vancouver USA
Visit Wichita
Visit York County
VisitErie
VisitPITTSBURGH
Visit Overland Park
Wrangell CVB
York County CVB

## Uruguay
AUDOCA

## Venezuela
The Meeting Planners CA Venezuela

DESTINATIONS
INTERNATIONAL
FOUNDATION