

DESTINATION **NEXT**

2025

DESTINATIONS INTERNATIONAL
FUTURES STUDY

Leading Through Transformation

A Strategic Road Map for the NEXT Generation of Destination Organizations





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Foreward



As we introduce the 2025 Destinations International DestinationNEXT Futures Study, we find ourselves at an extraordinary moment. Destination organizations worldwide face both unprecedented challenges and remarkable opportunities.

Around the world, destinations are navigating a time of profound change and unpredictability. In 2024, we witnessed a landmark year in international politics, as voters in at least 64 countries and the European Union – representing nearly half the world’s population – participated in elections with outcomes that will shape policy and economic environments for years to come. At the same time, rapid technological advancements, particularly in artificial intelligence, continue to transform how we live, work and travel.

These dynamics make destination organizations even more essential. Our work supports local economies, connects people, fosters innovation and enhances the quality of life within our communities. The ongoing evolution of our industry underscores the importance of DestinationNEXT as a strategic tool to help destination leaders make informed decisions to proactively shape their future.

The Futures Study is made possible through the generous support of the Destinations International Foundation. The foundation serves as an innovator and incubator for Destinations International and the wider industry, investing in research and programs that empower our members with the knowledge and tools needed to thrive in the evolving tourism landscape. We extend our gratitude to the hundreds of destination professionals and organizations who donate to the foundation; their commitment represents an investment in future-focused research and insights, and a commitment to advancing the essential work of the destination industry.

Destinations International’s mission is to empower destinations so their communities thrive. Our work advances the industry through innovative research, strategic tools, and professional development; one of our greatest strengths lies in our global network and the ability to connect destination leaders from around the globe. It is through this collaboration that we can tackle our industry’s biggest challenges, embrace change and turn uncertainty into opportunity. The collective wisdom and shared experience of our members and partners is the most powerful platform for navigating a complex and changing environment.

I hope you will explore and leverage the insights presented in this Futures Study and join us in working to shape a resilient and prosperous future. By harnessing our collective capabilities, experience, ideas and passion, we can ensure our industry continues to enrich communities across the globe.

Let’s embark on this transformative journey together.

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Don Welsh
President & CEO
Destinations International

Foreward



Over the past decade, MMGY NextFactor has proudly partnered with Destinations International on the Destinations International DestinationNEXT Futures Study, guiding destination organizations around the globe through significant periods of growth, disruption, and transformation. It has been an incredible journey, highlighting both the resilience and adaptability of our industry.

As we enter this new phase, the Futures Study itself is evolving. Our goal is to reinforce its role not merely as a benchmarking tool but as a visionary framework, providing actionable insights and strategic direction for destination leaders facing a rapidly changing landscape.

To achieve this, we've expanded our advisory panels to include new voices—the “unusual suspects”—from diverse industries, organizations, businesses, and community stakeholders who all benefit from this collective work. We've also engaged investors and developers, recognizing their crucial role in shaping the future of our destinations.

This evolution means moving beyond simply sharing survey results to deeply exploring the strategic implications for destination organizations. We aim to bring clarity to key industry concepts and terminology, such as destination development, ensuring everyone shares a common language and understanding of these critical ideas.

In today's fast-moving and unpredictable world, two years between studies is significant. To stay ahead, we are committed to providing quarterly “deep-dives” into segments of our findings, ensuring the industry remains informed, agile, and ready to adapt.

We extend our heartfelt gratitude to all who volunteered their valuable time and insights that make this report possible. Your contributions are essential to shaping a more strategic and informed future. Together, let's bring these strategies to life. We look forward to collaborating with you to ensure our industry thrives, no matter what the future holds.

A handwritten signature in black ink, appearing to read "Cassandra McAuley".

Cassandra McAuley
Managing Director
MMGY NextFactor

Executive Summary

The 2025 Destinations International DestinationNEXT arrives at a moment of profound transition for the global visitor economy. After a decade of disruption, reinvention, and recovery, destination organizations are entering a new era; one defined not only by shifting travel patterns and technologies, but by rising expectations from governments, communities, and travelers alike.

This year's study draws on input from a global advisory council, five targeted industry panels, and a worldwide survey of destination professionals. It identifies the top 25 strategies and eight critical forces shaping the future of destination

organizations—from geopolitical instability and workforce shortages to new measures of success and the accelerating impact of AI.

A central focus of the 2025 study is clarity of purpose, roles, and language. The report advances a shared definition of destination development, outlines emerging success metrics, and highlights the expanding mandate of destination organizations. It emphasizes the transition from traditional marketing roles to multidimensional leadership: in community engagement, destination stewardship, product development, advocacy, and policy.

Among the study's key findings:

42% of Destination Organization respondents reported their funding is at risk in the next three years, underlining the urgency of advocacy.

84% of destination organizations are actively involved in destination development, underscoring its growing importance as a core function.

Generative AI and evolving traveler behavior is transforming destination marketing, pushing organizations to adopt more authentic, data-informed, and personalized strategies.

Destination organizations have already taken on significantly expanded roles, requiring new capabilities, deeper collaboration across sectors, and more intentional internal structure.

The industry is redefining success, with KPIs increasingly focused on social impact, including resident sentiment, community benefit, environmental sustainability, and a welcoming environment rather than just visitation or spend.

The report organizes these insights into eight strategic themes that will define the next phase of destination leadership:



Each theme is grounded in survey data, enriched with qualitative insights from industry panels, and illustrated with practical case studies from around the world.

Ultimately, the 2025 DestinationNEXT Futures Study is a call to action. Destination organizations must evolve – not incrementally, but fundamentally. The path forward will require new capabilities, deeper collaboration, and a shared understanding of what success looks like. Armed with these tools and insights, destination leaders are well-positioned not just to navigate change—but to lead it.

Introduction

Destination organizations stand at the crossroads of significant change. Over the last decade, rapid shifts in technology, consumer behavior, global geopolitics, and societal values have profoundly reshaped the tourism and visitor economy landscape. DestinationNEXT Futures Studies have consistently served as strategic compasses for industry leaders worldwide, offering insights and practical guidance to navigate these dynamic shifts effectively.

The 2025 DestinationNEXT Futures Study continues this essential role, leveraging broad international engagement and expert perspectives to identify emerging trends and best practices. This year's study marks an important milestone and offers a reflective look at the industry's evolution, while also charting a clear path forward for destination organizations.

DestinationNEXT: Evolution of an Industry

Since its inception in 2014, the DestinationNEXT Futures Study has captured and articulated the shifting roles and responsibilities of destination organizations. Initially, the focus was on evolving from traditional destination marketing to a broader approach that integrated destination management. Early studies underscored three transformational opportunities: evolving from broadcast to engagement marketing, prioritizing brand building, and embracing collaborative business models.

By 2017, the industry had largely transitioned to more integrated roles. Destination organizations were increasingly viewed not just as marketers, but as catalysts and conveners, working closely with stakeholders to manage visitor experiences and community relationships more proactively.

Since its inception in 2014, the DestinationNEXT Futures Study has captured and articulated the shifting roles and responsibilities of destination organizations.

The 2019 study introduced the concept of destination stewardship, emphasizing the industry’s growing recognition that successful destination management required alignment with community values and long-term sustainability. Destination organizations began shifting their metrics of success and looking beyond immediate economic impacts to include the well-being and quality of life for residents.

The pandemic years (captured prominently in the 2021 Futures Study) accelerated many of these trends, further embedding stewardship, sustainability, and social equity into the heart of destination strategy. Organizations embraced a broader remit, using tourism as a vehicle to enhance community resilience, equity, and environmental sustainability.

In 2023, the DestinationNEXT Futures Study highlighted an even broader role for destination organizations, positioning them as community leaders and strategic partners across multiple sectors. Emphasizing technology adoption, especially artificial intelligence and data-driven decision making, this most recent study reinforced the industry’s evolution towards strategic community leadership, proactive destination stewardship, and sophisticated visitor engagement practices.

As we look ahead, the 2025 Futures Study builds upon this rich legacy, reaffirming the industry’s commitment to innovation, collaboration, and sustainable growth that benefits visitors, residents, and communities alike.

Edition	Signature Insight	How the Destination Organization Role Expanded
2014 Futures Study	Identified three transformational opportunities—broadcast-to-engagement marketing, brand building, and collaborative business models as well as introduced the now-familiar Scenario Model .	From pure promotion to connector across economic development, branding and technology.
2017 Futures Study	Confirmed that trend lines were intensifying and reframed the three opportunities as Sales & Marketing Reinvention, Destination Management, and Partnership-driven Business Models. Introduced five future roles: Curators, Adopters, Catalysts, Activists, Collaborators.	Destination Organizations began to claim space as product developers and community conveners, not just marketers.
2019 Futures Study	Elevated Destination Stewardship, Community Alignment, and Digital Conversion as the core agenda. The idea of the Destination Organization as a shared community value took centre stage.	Stewardship narrative formalized—Destination Organizations positioned as guardians of place and resident experience.
2021 Futures Study	In a pandemic-disrupted landscape, advanced Destination Alignment, Sustainable Development, and Values-Based Marketing. Emphasised equity, diversity & inclusion and climate resilience.	Organizations embraced a triple-bottom-line lens, tying visitor strategy to resident quality of life and environmental limits.
2023 Futures Study	Mapped the <i>Mandate Matrix</i> —Visitor Engagement, Partner Support, Community Alignment, Destination Development—and spotlighted two imperatives: Community Leadership and Technology Adoption.	Destination Organizations recognised as community leaders leveraging data and technology to co-design the future with residents and partners.

Defining Destination Development: Clarifying a Strategic Imperative

Destination organizations have discussed “destination development” extensively in recent years, however, a clear, universally accepted definition has been elusive. The lack of clarity has created challenges in aligning stakeholders, prioritizing initiatives, and measuring success. The 2025 Futures Study aims to resolve this ambiguity by clearly defining destination development and outlining its relevance at various growth stages of the visitor economy.

Defining Destination Development

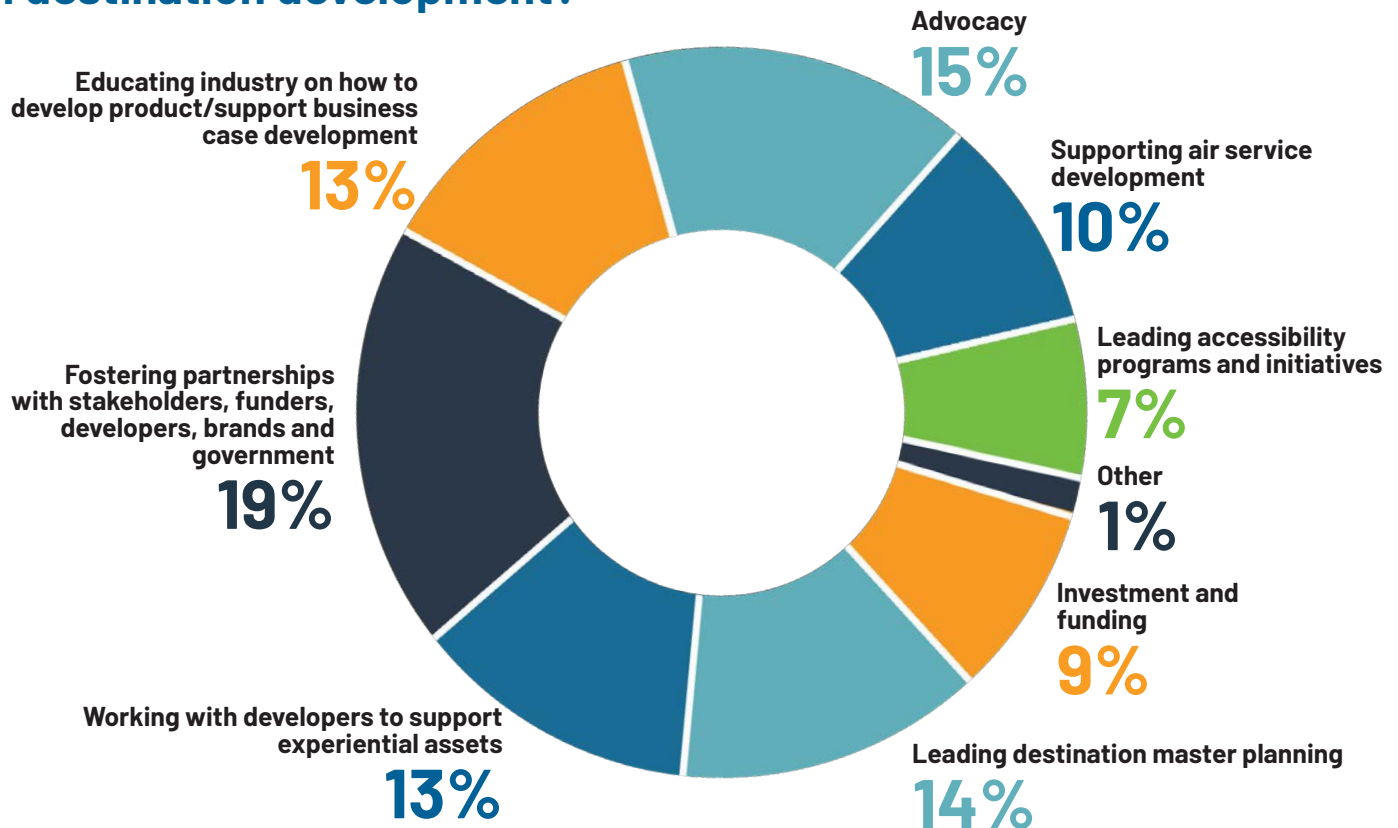
Destination development is the strategic art of shaping and enhancing places to deliver exceptional visitor experiences, foster local pride, and drive community and economic vitality. It prioritizes creative placemaking, meaningful community collaboration, and innovative tourism investments to build vibrant and resilient destinations.

Destination development is fundamentally about enhancing and evolving the supply side of a destination’s visitor economy. It involves strategic planning, creating, and improving tourism-related assets, infrastructure, experiences, and services to better attract and accommodate visitors. Unlike traditional destination marketing—which primarily focuses on promoting existing attractions—destination development is proactive, focused on creating the conditions that make a destination desirable and competitive in the first place.

Key activities within destination development include:

- Building partnerships with stakeholders such as local governments, investors, developers, and community groups.
- Leading destination master planning processes to guide coordinated, sustainable growth.
- Advocating for supportive policies and funding to facilitate investment in tourism infrastructure.
- Educating local businesses and industry stakeholders on product development and business case formulation.
- Facilitating the creation and enhancement of authentic, high-quality experiences that reflect local culture and assets.
- Supporting air service development.

What do you believe are the key roles of destination organizations in destination development?



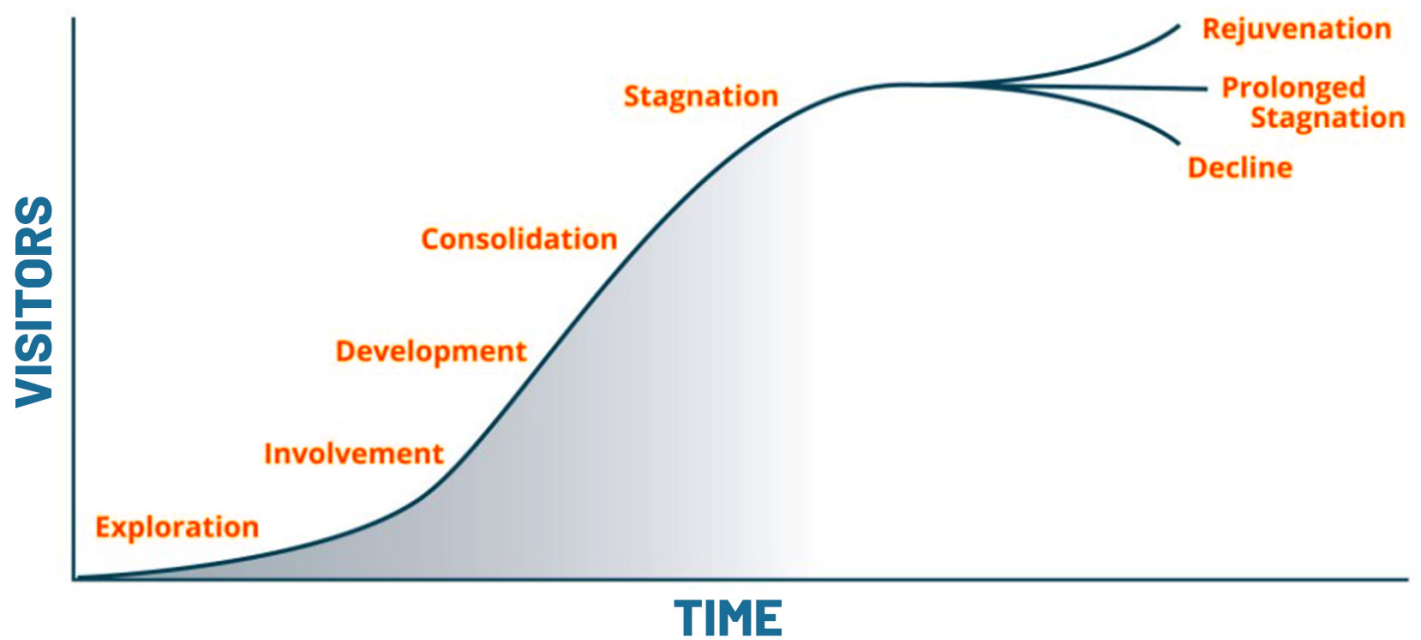
To further clarify, it is essential to understand that destination development strategies will differ significantly depending on where a destination is in its growth journey, often described as the “destination lifecycle.” The lifecycle framework describes a destination’s growth in stages:

EXPLORATION PHASE: Early-stage destinations where tourism infrastructure is minimal. Here, destination development typically focuses on initial planning, research, and foundational infrastructure development.

INVOLVEMENT PHASE: Destinations seeing growing visitor interest begin emphasizing attracting investment, enhancing basic infrastructure, and increasing community engagement to support future growth.

DEVELOPMENT PHASE: At this stage, destinations prioritize deepening and diversifying visitor experiences, actively investing in facilities, events, and amenities to accommodate larger visitor volumes sustainably.

CONSOLIDATION AND MATURITY PHASES: More developed destinations shift focus towards advanced destination management practices, addressing overtourism challenges, refining visitor experiences, and reinforcing long-term sustainability and stewardship.



(Tourism Area Life Cycle, Richard Butler)

By clearly defining and contextualizing destination development, destination organizations can strategically align stakeholders, prioritize initiatives effectively, and measure progress toward enhancing visitor experiences, economic diversification, and overall community resilience and well-being.

This clarity is critical for ensuring that destination development is not only strategic and intentional but also sustainable and inclusive, delivering benefits that extend broadly throughout the community.

This year's study marks an important milestone, offering a reflective look at the industry's evolution, while also charting a clear path forward for destination organizations.

Methodology

The DestinationNEXT 2025 Futures Study was developed through a structured, four-phase process designed to capture global perspectives on the forces shaping the future of destination organizations. This year's study placed a strong emphasis on forward-looking strategy, organizational evolution, and actionable insights for destination leaders.

The research and analysis in this report were completed in June 2025. It reflects trends, data, and expert input current at that time, recognizing that new developments may have emerged since publication.

PHASE 1

Global Advisory Council

The process began with the formation of a global advisory council made up of senior leaders from destination organizations and industry associations. This group provided early input on emerging issues and helped shape the direction of the study. Their perspectives ensured the process remained grounded in the realities destination organizations face today while staying focused on what's next.

PHASE 2

Industry Panels and Strategic Input

To deepen insight and diversify perspectives, the 2025 study incorporated five dedicated industry panels:

- 1. Community Panel:**

Representatives from non-profits, academic institutions, and community-based organizations;

- 2. Industry Panel:**

Destination organization leaders, tourism operators, and business leaders;

- 3. Unusual Suspects Panel:**

Professionals outside the traditional visitor economy;

- 4. Customer Panel:**

Meeting planners, travel agents, and travel trade professionals;

- 5. Investor & Developer Panel:**

Tourism-related investors, infrastructure developers, and advisors.

Each panel participated in one-on-one interviews or small group discussions, contributing qualitative insights that informed the development of the trend and strategy set used in the survey. The panels also offered feedback on the expanding roles and responsibilities of destination organizations and how success should be measured in the years ahead.

PHASE 3

Global Survey

A global survey was distributed to professionals working across the industry. Participants were asked to evaluate a list of trends and strategies shaping the future of destination organizations and to provide feedback on their organization's current and ideal future roles, performance metrics, and priorities. This year's survey also included new questions specifically focused on destination development, designed to better understand how organizations are engaging in this increasingly critical area.

A teal rectangular box containing the text "537 Participants" in white. The number "537" is large and bold, while "Participants" is in a smaller font to its right.

537 Participants

A dark blue rectangular box containing the text "36 Countries" in white. The number "36" is large and bold, while "Countries" is in a smaller font to its right.

36 Countries

PHASE 4

Final Report and Analysis

In the final phase, survey data and qualitative insights were analyzed to identify the most important trends and strategies, as well as emerging shifts in destination organization mandates and measures of success. Unlike previous editions, the 2025 report focuses on the top 25 strategies, allowing for deeper insight and practical guidance.

The report is structured around eight key themes and includes strategic takeaways, new frameworks, and evolving success metrics to help destination organizations lead through disruption and build long-term value for their communities.

2025 FUTURES STUDY

THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Securing Investment Through Advocacy and Impact

Funding remains one of the most persistent—and precarious—challenges facing destination organizations today. While the economic impact of the visitor economy is well-established, public funding for destination organizations continues to face growing scrutiny and political vulnerability. In the 2025 Futures Study survey, 42% of destination organizations reported their funding is at risk of being reduced or eliminated in the next three years, an increase from 37% in 2023.

In response, many destination organizations have pursued more diversified revenue streams, including tourism improvement districts, levies on short-term rentals, and targeted visitor levies. While these mechanisms can create greater financial resilience, they also come with trade-offs. As funding becomes more fragmented, some governments have scaled back their investment, assuming destination organizations can now “fund themselves.” This dynamic underscores the need for proactive advocacy, not only for tourism broadly, but for the destination organization’s unique role as a public good.

To secure sustainable investment, destination organizations must evolve from passive recipients of funding to assertive advocates for the value they create. This begins with strengthening relationships with government stakeholders and positioning tourism as a community shared value: an industry that delivers returns in jobs, tax

revenue, small business growth, and community well-being.

Just as importantly, advocacy must extend beyond government. Building resident and business support is critical to long-term funding stability. Demonstrating how tourism benefits locals through enhanced amenities, cultural vitality, and shared prosperity helps neutralize opposition and reinforce the destination organization’s role as a trusted steward of place.

The most successful organizations are moving beyond static funding models and embracing a more entrepreneurial mindset. They are safeguarding existing revenue streams, exploring innovative funding mechanisms, and strengthening public-private collaboration. But they’re also making the case for continued public investment—showing that while funding diversity increases resilience, it does not replace the foundational role of government support.

In an era of heightened scrutiny and shifting priorities, the imperative is clear: destination organizations must tell their story boldly, credibly, and consistently. The ability to advocate effectively for the organization, the community and the industry is now as important as any marketing campaign or visitor program. Advocacy is no longer just a communications strategy, it is a core function of destination leadership.

Relevant Trends:

- #1** Tourism needs increased advocacy and recognition from government to grow economic impact.
- #15** Public scrutiny of destination funding is rising, with government allocations and/or industry-generated taxes and levies increasingly at risk of diversion.

Relevant Strategies:

- #2** Lead destination advocacy by strengthening government relations to shape supportive policies.
- #3** Strengthen local community engagement and sentiment to build sustainable support for the visitor economy.
- #4** Safeguard existing revenue streams while exploring diverse funding sources to maintain and expand financial stability.

1

Securing Investment Through Advocacy and Impact



2

THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Navigating Economic and Geopolitical Uncertainty

The global visitor economy reached a milestone in 2024, with international travel nearing full recovery at 1.4 billion travelers, or 99% of pre-pandemic levels (UN Tourism). Yet, what initially appeared to be a period of normalization has instead given way to heightened complexity. Destination organizations are navigating an era defined by economic volatility, geopolitical instability, rising nationalism, and shifting societal values. These forces are reshaping travel flows, dampening traveler confidence, and prompting a re-evaluation of long-standing assumptions about global mobility and openness.

Travelers are increasingly drawn to destinations perceived as safe, stable, and welcoming. Destinations with visible social challenges or restrictive policies are seeing their reputations and competitiveness erode. In this environment, domestic and regional tourism has emerged as a critical foundation for recovery and long-term resilience, offering more dependable demand amid unpredictable global conditions.

Uncertainty manifests in different ways around the world, from rising costs and softening demand to political upheaval and operational disruption. Regardless of context, what's clear is that agility is no longer a strategic advantage but a core capability. Successful destination organizations are adopting a mindset that views uncertainty not as an exception to be managed, but as a constant to be navigated.

Thriving in this climate requires three key shifts. First, destination organizations must move from rigid long-range plans to flexible, scenario-based strategies that can pivot quickly as conditions evolve. Second, they must build the capacity to detect weak signals and patterns—integrating data, local insights, and external scanning to anticipate change before it hits. And third, they must embrace disciplined experimentation, testing small-scale initiatives that can scale quickly when the moment is right.

At the same time, the fundamentals matter more than ever. Safety, health, and security must be prioritized—not just in operations but as pillars of the brand promise. Risk management should be elevated from a back-office function to a strategic discipline. And destination leaders must continue advocating for smarter policy—reducing border friction, maintaining open travel corridors, and ensuring tourism remains a tool for connection rather than division.

Extreme uncertainty will continue to challenge traditional planning and disrupt old models. But destination organizations that lead with adaptability, foresight, and clarity of purpose will be better positioned to guide their communities through turbulence—and emerge stronger on the other side.

Relevant Trends:

- #4** Domestic and regional tourism is becoming a more critical driver of destination resilience and growth.
- #9** Geopolitical tensions and nationalism are rapidly altering global travel flows, as travelers seek destinations perceived as safe and welcoming.
- #20** Shifts in international travel patterns are requiring destinations to diversify and adapt their market approaches.
- #25** Rising social challenges and visible urban issues are harming visitor perceptions and weakening both destination brand integrity and economic growth.

Relevant Strategies:

- #9** Embrace adaptability by developing strategies with flexible initiatives that can adjust to a range of potential futures and disruptions.
- #24** Pay close attention to safety, health, and security as a strategic consideration.

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Navigating Economic and Geopolitical Uncertainty

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THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Scaling Organizational Capacity to Meet Expanding Expectations

Over the past decade, the role of destination organizations has expanded dramatically—beyond marketing, beyond management, and increasingly into community development, stakeholder coordination, and even civic problem-solving. This evolution reflects both the strengths and the growing expectations placed on destination organizations. In many places, success has led to increased demand for these organizations to lead broader initiatives—sometimes well beyond the traditional scope of tourism.

The 2025 Futures Study reveals just how much the landscape has shifted. In 2017, the Futures Study examined 11 core functions of destination organizations. In 2025, that number has more than doubled, with 24 distinct roles identified across marketing, development, research, policy, community engagement, and economic strategy. Stakeholders increasingly look to destination organizations not just to promote a place—but to shape its future.

But with broader responsibility comes a need for sharper clarity. Destination organizations must define, and regularly reaffirm, their core mandate. This begins with strengthening governance, clearly articulating roles and priorities, and avoiding “scope creep” that can dilute resources and stretch organizations too thin. At the same time, new challenges require cross-sector partnerships, particularly in areas where tourism intersects with

housing, short-term rentals, mental health, or homelessness. Leading organizations are working proactively with local governments, developers, and community organizations to address these issues with humility and focus.

Crucially, communities expect to have a voice in these conversations. Residents increasingly want to be involved in shaping the experiences that define their cities and regions—for both visitors and locals. More and more destination organizations are responding by creating resident advisory councils, embedding engagement into planning processes, and adopting frameworks that center on community sentiment as a success metric.

Looking ahead, success will depend on both strategy and structure. Destination organizations will need to invest in skills and systems that support multi-stakeholder collaboration, policy engagement, data-driven planning, and organizational agility. As the mandate expands, so must the capacity to deliver.

The future belongs to destination organizations that are clear in purpose, aligned with their communities, and equipped to lead across a broader landscape.

Relevant Trends:

- #3** Greater industry, community, and government alignment is driving destination competitiveness and brand.
- #5** Resident sentiment and community engagement are critical to maintaining destination alignment.
- #7** Destination organizations must proactively manage Board and stakeholder expectations as their roles and responsibilities continue to evolve.
- #12** Communities expect to be more engaged in destination, product and experience development for locals and visitors.
- #13** Destination organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources.

Relevant Strategies:

- #5** Better align tourism and economic development.
- #11** Expand organizational mandate to align visitor experiences with resident quality of life and community relevance.
- #13** Ensure clarity on Board roles, development and governance.
- #22** Support improvement of regulatory compliance including short-term rentals.

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Scaling Organizational Capacity to Meet Expanding Expectations



4

THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Shaping Places for People and Prosperity

In today's evolving visitor economy, the role of destination organizations is expanding beyond promotion and stewardship toward shaping the very environments in which visitor experiences unfold. As travel patterns shift and traditional tourism anchors like downtown business districts undergo major transformation, destinations are being challenged to create vibrant, inclusive, and authentic places that serve both visitors and residents.

The pandemic fundamentally altered the rhythms of urban life. In many cities, daytime foot traffic and office-based activity have declined, while evenings and weekends now bring renewed energy to once-quiet streets. This shift has redefined what makes a city center successful—not just as a commercial hub, but as a cultural and social destination in its own right. Increasingly, destinations are turning to placemaking strategies to reimagine these spaces as dynamic, multi-use experience districts—places where people want to live, gather, create, and explore.

This rebalancing of the visitor experience is part of a broader trend toward destination “activation”—the deliberate cultivation of memorable experiences, creative environments, and cultural touchpoints that invite both connection and curiosity. It's about animating the destination in ways that feel local, alive, and meaningful. That includes preserving and celebrating authenticity,

promoting local arts and businesses, and elevating the voices and stories of underrepresented communities.

As the experience economy matures, this blending of purpose and place is becoming a key differentiator. And it creates both opportunity and responsibility for destination organizations: to not just manage or market the destination, but to actively shape it.

A vital component of this work is attracting the right kinds of investment. While international visitor numbers have rebounded, unlocking new capital—especially for experience-led or regenerative projects—requires a clear and compelling vision. Destination organizations must position themselves as conveners and collaborators, fostering confidence among developers, small businesses, and government partners. Long-term planning, cross-sector alignment, and community-first development are all critical to building places people want to visit—and return to.

In this environment, destination organizations are increasingly seen as “place builders”—strategic leaders who animate public spaces, curate meaningful experiences, and cultivate local pride.

Relevant Trends:

- #6** The future desirability of downtowns depends on their evolution into vibrant, multi-use experience districts that attract residents, workers, and visitors alike.
- #8** Preserving authenticity and distinctiveness is becoming critical as similar or standardized tourism offerings threaten destination brand value and visitor attachment.
- #19** Destinations are focusing on improving accessibility for travelers of all abilities.
- #23** The rise of the “anytime, anywhere traveler” is blurring the lines between business and leisure, with remote work enabling more frequent, extended, and blended travel experiences.

Relevant Strategies:

- #6** Develop and lead a comprehensive destination master plan that defines long-term strategy while integrating product development initiatives.
- #16** Lead initiatives that improve accessibility for people of all abilities throughout the destination
- #19** Expand support for local arts and cultural organizations.
- #23** Foster neighborhood development through enhanced support and promotion for local small businesses and community groups.
- #25** Work more closely with airlines to build and promote air routes.

4

Shaping Places for People and Prosperity



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THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Reimagining Destination Marketing in the Age of AI and Authenticity

The foundations of destination marketing are being profoundly reshaped. Technology, especially generative AI, is altering how content is created, decisions are made, and travel is discovered. At the same time, authenticity is more valuable than ever, as travelers seek real, human-centered experiences and stories they can trust.

Destination organizations must now operate at the intersection of these two powerful forces: leveraging AI to enhance agility and personalization while deepening their connection to community voices and values.

Younger travelers, digitally native, socially conscious, and experience-driven, are playing a central role in this shift. Their expectations for dynamic, tailored content are fueling demand for hyper-personalized storytelling and seamless digital touchpoints. They also expect destinations to reflect their values; diversity, sustainability and local culture, authentically and consistently.

Generative AI is enabling destination organizations to meet these demands more efficiently and at greater scale. Whether it's brainstorming itineraries, enhancing creative workflows, or rapidly producing multilingual content, AI is already transforming marketing teams. Leaders in the space are also beginning to use AI for deeper research, contextual awareness, and dynamic content optimization across platforms.

Yet, as the technology accelerates, so do the challenges. Destination marketers are navigating questions around ethical use, brand control, and data quality. The rapid democratization of content, especially user- and creator-driven storytelling, means traditional destination marketing organizations no longer control the narrative. Instead, they must curate, amplify, and align these narratives with a destination brand that is increasingly co-created with locals and visitors alike.

AI isn't replacing creativity, it's expanding it. But to succeed, destination organizations must lead with intent. That means grounding brand strategies in local identity, clearly defining usage policies for AI tools, and fostering internal fluency across teams. It also requires reframing success: from pageviews and impressions to connection, influence, and community relevance.

The most effective destination marketers of tomorrow will not just master emerging tools, they will also earn trust through transparency, promote local voices, and embrace AI as a collaborator, not a crutch. In this new landscape, competitive advantage comes from both technological adaptability and human authenticity.

Relevant Trends:

- #16** The rise of generative AI is disrupting traditional destination marketing models.
- #17** Destination organizations must adapt to the preferences of younger travelers by evolving and diversifying their market approaches to capture this generation's growing spending power.
- #18** Destination storytelling is increasingly shaped by visitors and local creators, reducing the control traditional Destination Organizations have over brand narratives.

Relevant Strategies:

- #1** Develop the destination brand rooted in the community's goals, values, and creative energy to deliver authentic experiences for the customer.
- #8** Leverage data management capabilities and innovative technologies, including generative AI, to enhance business intelligence, marketing, and community engagement.

5

Reimagining Destination Marketing in the Age of AI and Authenticity

Driving Impact Through Intentional Event Strategies

Around the world, destinations are doubling down on events, not just as visitor drivers, but as engines of identity, investment, and inclusive economic growth. Whether it's music festivals, sports tournaments, or global summits, well-curated events offer a powerful opportunity to animate a place, spark community pride, and showcase a destination's brand on the world stage. As competition intensifies, the ability to attract, develop, and host signature events has become a core strategy for destinations looking to grow their visitor economies and distinguish themselves in a crowded global market.

The 2025 Futures Study highlights a growing emphasis on sports tourism, cultural festivals, and business events as avenues for year-round activation and market diversification. From driving off-season visitation to aligning with high-yield traveler segments, events are increasingly used as strategic tools to meet broader destination goals. However, success in this space requires more than bidding for big-name events. It demands a purposeful, whole-of-community approach that considers brand alignment, infrastructure readiness, community impact, and long-term legacy.

Destinations that lead in this space aren't just asking, "Can we host this event?"—they're asking, "Should we?" The most effective strategies align event acquisition and development with the region's priority sectors, identity, and long-term objectives. This could mean targeting business events that leverage local intellectual

capital, investing in music festivals that elevate local artists, or building sports tourism around community participation as much as elite competition. Across all formats, the emphasis is shifting from one-off impact to lasting value.

The rise of sports and music tourism is particularly notable. According to recent forecasts, these sectors alone are expected to grow into a \$1.5 trillion global economy by 2032 (Collinson International Ltd.). These events not only drive visitor volume and local spend, but also create opportunities for storytelling, content creation, and re-engagement. Likewise, business events are becoming more experiential, blending education, inspiration, and connection in ways that traditional meetings once struggled to deliver.

To remain competitive, destinations are also sharpening their approach to incentives and readiness. Subvention funds are increasingly used to attract and retain high-value events, while public and private investment is being directed toward upgrading venues, public spaces, and digital infrastructure. At the same time, there is growing scrutiny over the real costs and benefits of hosting major events, making transparency, evaluation, and community consultation essential.

The role of destination organizations is evolving in parallel. No longer limited to event marketing or logistics, leading organizations are acting as conveners and catalysts, bringing together rights holders, venues, businesses, and government to co-create event strategies that reflect shared

goals. They are supporting new event creation, nurturing local talent, and embedding impact objectives, such as legacy programs, accessibility, and sustainability into the planning process from the start.

In this next era of event strategy, the winners won't be those who host the most events, but those who host the right ones. Destinations that approach events with clarity, creativity, and community at the center will unlock not only economic growth, but enduring brand strength and social impact.

Relevant Trends:

- #14** Destination organizations are increasing their focus on sports tourism and major cultural events for short and long-term diversification of the visitor market.
- #21** Competition among destinations is increasing incentives and subvention funds for business events, cultural events and sports tourism.

Relevant Strategies:

- #10** Develop and support new events that enhance destination brand, attract visitors, and support the local economy.
- #14** Leverage our region's priority economic sectors to generate business events.
- #18** Increase efforts to develop the region's sports tourism market.
- #20** Increase use of incentives to attract business events, cultural events and/or sports tourism.
- #21** Evaluate and increase readiness to host major events.

6

Driving Impact Through Intentional Event Strategies



7

THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Advancing Regeneration and Building Long-Term Resilience

Across the globe, destination organizations are grappling with a growing imperative: to build a visitor economy that delivers economic, social, and environmental value—not just now, but for the long term. The pressures are mounting. Climate change is already reshaping travel behaviors. Communities are voicing concerns about overcrowding and rising costs of living. Travelers themselves are more attuned than ever to tourism’s impacts on ecosystems, on culture and on the people who call destinations home.

The 2025 Booking.com Travel & Sustainability Report reveals that 84% of travelers consider sustainability important, and more than half are now actively considering the impact of tourism on local communities as well as the environment. A clear majority say they want their spending to support local businesses, and nearly 70% aspire to leave places better than they found them. But intent isn’t enough. Destination organizations must translate this rising awareness into practical strategies, clear metrics, and collaborative action.

That work is underway. From climate-responsive infrastructure and regenerative tourism models to social equity programs and destination-wide KPIs, the industry is shifting from short-term growth to long-term resilience. Yet progress is uneven. In many parts of the world, regenerative tourism is still viewed as a “nice to have” rather than a strategic necessity.

This inconsistency reflects a broader challenge: sustainability and regeneration mean different things to different places. That’s why destination organizations must define and advance regenerative tourism on their own terms—rooted in local priorities but aligned with global frameworks like the UN Sustainable Development Goals. It’s not just about protecting the environment. It’s about preserving cultural heritage, supporting decent work, fostering inclusive communities, and ensuring every destination remains livable, welcoming, and viable for generations to come.

A key part of this shift involves redefining what we measure. Traditional metrics like hotel occupancy and visitor spending offer only a narrow view of success. Leading destinations are developing multidimensional KPIs that also account for resident sentiment, environmental health, cultural vibrancy, and long-term economic impact. These indicators not only tell a more complete story but also build the business case for continued investment in regenerative practices.

At its heart, this is about leadership. Destination organizations must be champions of regeneration, not only implementing best practices internally but equipping partners, policymakers, and visitors to do the same.

Relevant Trends:

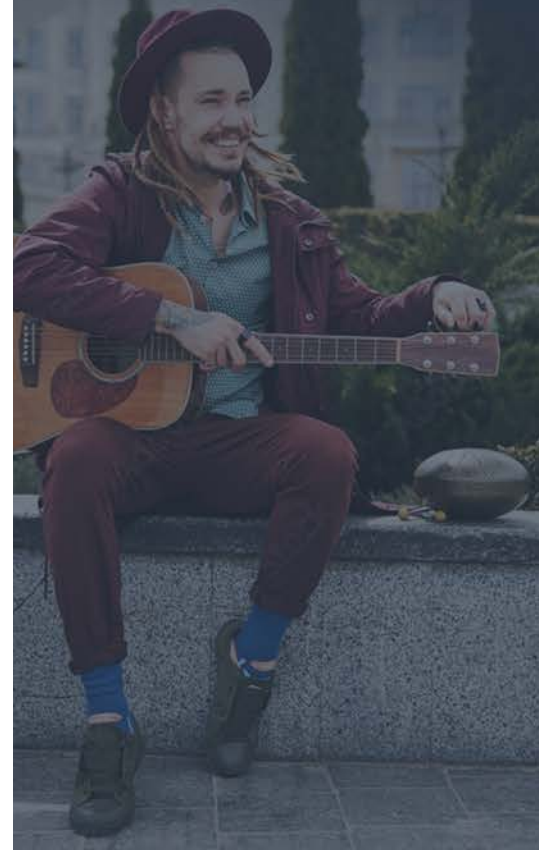
- #2** Industry leaders need multi-dimensional KPIs that go beyond traditional economic metrics to effectively measure and communicate the industry's full economic, social, and environmental value.
- #10** Destinations are prioritizing visitors who deliver greater economic, cultural, and environmental value, rather than simply pursuing volume growth.
- #24** Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social, and environmental impacts.

Relevant Strategies:

- #7** Establish multi-dimensional data-driven KPIs to measure and enhance both economic and social impacts of a sustainable visitor economy.
- #17** Develop and implement sustainable tourism practices to help protect and steward the natural environment.

7

Advancing Regeneration and Building Long-Term Resilience



8

THE EIGHT FORCES SHAPING THE FUTURE OF DESTINATION ORGANIZATIONS

Building a Future-Ready Industry Workforce and Organization

The global visitor economy continues to grow, but the workforce behind it is strained. Long-standing challenges around pay, hours, and working conditions have been compounded by housing shortages, an aging workforce, and growing competition from other sectors. At the same time, destination organizations themselves face growing internal demands: more complex mandates, broader stakeholder expectations, and the need to build inclusive, high-performing teams. Addressing these workforce and organizational challenges is no longer optional, it's essential for long-term competitiveness and credibility.

Survey findings from the 2025 Futures Study confirm that labor shortages, workforce retention, and generational shifts are high on the list of industry concerns. Housing affordability is seen as a critical barrier to attracting and retaining staff. And equity, diversity, and inclusion have emerged not just as HR priorities, but as organizational imperatives with real operational and reputational impacts.

Research also shows that many workers in the industry take pride in their roles and enjoy strong connections with colleagues and customers. But that pride doesn't always translate to long-term retention. Workers cite low wages, irregular hours, limited career growth, and a lack of respect from customers as key reasons for leaving the industry. For newer entrants, particularly those who joined during the pandemic, there's often less satisfaction, less connection, and more churn (Development Counsellors International).

To respond, destination organizations must take a longer view, strengthening their own internal teams while also playing a visible leadership role in addressing broader workforce system challenges. That means investing in talent development, creating more inclusive and supportive workplace cultures, and building awareness of tourism as a career path. It means working more closely with government, industry, and community partners to advocate for housing and transport solutions that enable people to live and work locally. And it means ensuring that the people representing a destination reflect the diversity, values, and lived experiences of the communities they serve.

At the same time, destination organizations themselves must be equipped to meet rising internal expectations. As their scope expands, so too must their leadership, systems, and structure. Attracting and retaining mission-driven talent, modernizing internal processes, and building cultures of learning and collaboration will be essential to sustaining high performance. In a field where burnout and turnover are real risks, investing in people isn't just about filling positions, it's about building resilient, future-ready teams.

The workforce challenge is not a short-term disruption. It is a defining issue that will shape the ability of destinations to deliver on every other strategic priority, from experience development to sustainability to stewardship. Destination organizations that lead with purpose, invest in people, and build strong internal foundations will be far better positioned to deliver impact for their communities and partners.

Relevant Trends:

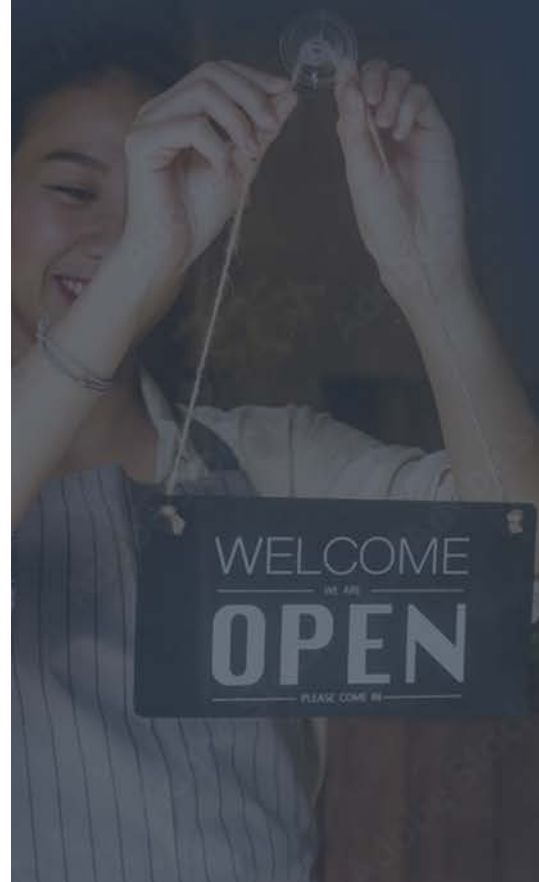
- #11** Industry must address skilled labor shortages, labor pipelines, and generational workplace shifts.

Relevant Strategies:

- #12** Strengthen organizational talent through increased investment in building and maintaining a skilled, motivated, and loyal workforce.
- #15** Lead initiatives to promote tourism as a career path to address industry workforce shortages.

8

Building a Future-Ready Industry Workforce and Organization



Industry Implications: Evolving Roles, Expanding Mandates, and New Measures of Success

The DestinationNEXT 2025 Futures Study reveals a visitor economy in transformation—and destination organizations evolving rapidly in response. As societal expectations, community needs, and strategic opportunities shift, destination organizations are moving far beyond their promotional roots. The scope of responsibility is broader. The list of stakeholders is longer. And the definition of success is being rewritten in real time.

From Marketers to Multidimensional Leaders

Destination marketing and promotion remains the foundation. In the 2025 Futures Study survey, it is ranked as the top role performed by destination organizations today—and projected to remain so in three years. But what surrounds that core function has changed dramatically. Traditional roles like brand management, visitor services, and meetings sales remain essential. Yet, new responsibilities are rising in prominence: data and business intelligence, government relations, product development, community partnerships, and broader economic development all appear in the top 10 “ideal roles” for destination organizations by 2028.

What’s especially notable is the diversification and maturation of these roles. For example, equity, diversity, and inclusion (EDI) leadership, environmental stewardship, workforce development, and crisis management are no longer viewed as peripheral. They are increasingly integral to how destination organizations operate and lead. Roles such as air service development, health and safety communication, and even film industry development are becoming more common as organizations position themselves as conveners across a wider range of sectors.

2025 Rank	Roles	2025 Future
1	Destination marketing	1
2	Brand management	2
3	Community relations and partnership	6
4	Destination information resource	8
5	Data research and business intelligence	3
6	Government relations and policy development	5
7	Destination and product development	4
8	Industry advocate	7
9	Visitor services	13
10	Meetings and conventions sales	9
11	Leisure sales	11
12	Broader economic development	10
13	Sports tourism development and promotion	12
14	Environmental stewardship	17
15	Equity, Diversity, Inclusion leadership	20
16	Major event partner and developer	16
17	Workforce development	15
18	Crisis management and emergency preparedness	18
19	Convention services	14
20	Air service and route development	19
21	Health and safety resource	21
22	Film and television industry development	22
23	Venue operator	23
24	Other	24

Redefining Success in a Broader Mandate

As destination organizations evolve, so too must the metrics by which their success is judged. Traditional KPIs like economic impact, overnight visitation, and room nights remain near the top of the list, but they are no longer sufficient on their own. The 2025 Futures Study survey shows a clear shift toward a more balanced, multidimensional approach to measurement.

Indicators such as visitor satisfaction, stakeholder engagement, marketing ROI, and partner satisfaction continue to hold weight. But future-focused organizations are placing greater emphasis on metrics like resident sentiment, community benefits, long-term event legacy, environmental impact, and EDI outcomes. These are not just “soft” measures, they reflect the broader value destination organizations are expected to create for their communities and partners.

Importantly, the rising importance of these KPIs signals a shift in mindset. Success is no longer measured only in volume or visibility, but in shared prosperity, social cohesion, and long-term resilience. Metrics are becoming tools for alignment, not just accountability but helping organizations navigate complex trade-offs and ensure their work reflects community priorities and values.

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

Implications for the Industry

This shift in roles and success measures has three key implications for the future of the destination organization:

1

Organizational models must evolve.

New capabilities require new structures. Whether through team restructuring, upskilling, or cross-functional integration, destination organizations must be designed for agility, complexity, and collaboration.

2

Governance and stakeholder alignment are more critical than ever.

As roles expand, so must clarity. Boards, funders, and community partners need to understand what the organization does—and why. Strong governance models and transparent reporting will help build credibility and trust.

3

The definition of success must be shared.

Destination organizations cannot be the only ones setting the bar. Communities, partners, and governments must co-own what success looks like and support the resources and policies needed to achieve it.

As destination organizations take on more and deliver more, they are reshaping what it means to lead in the visitor economy. The future will not be defined solely by who brings in the most visitors, but by who creates the greatest value for their people, their places, and the planet.

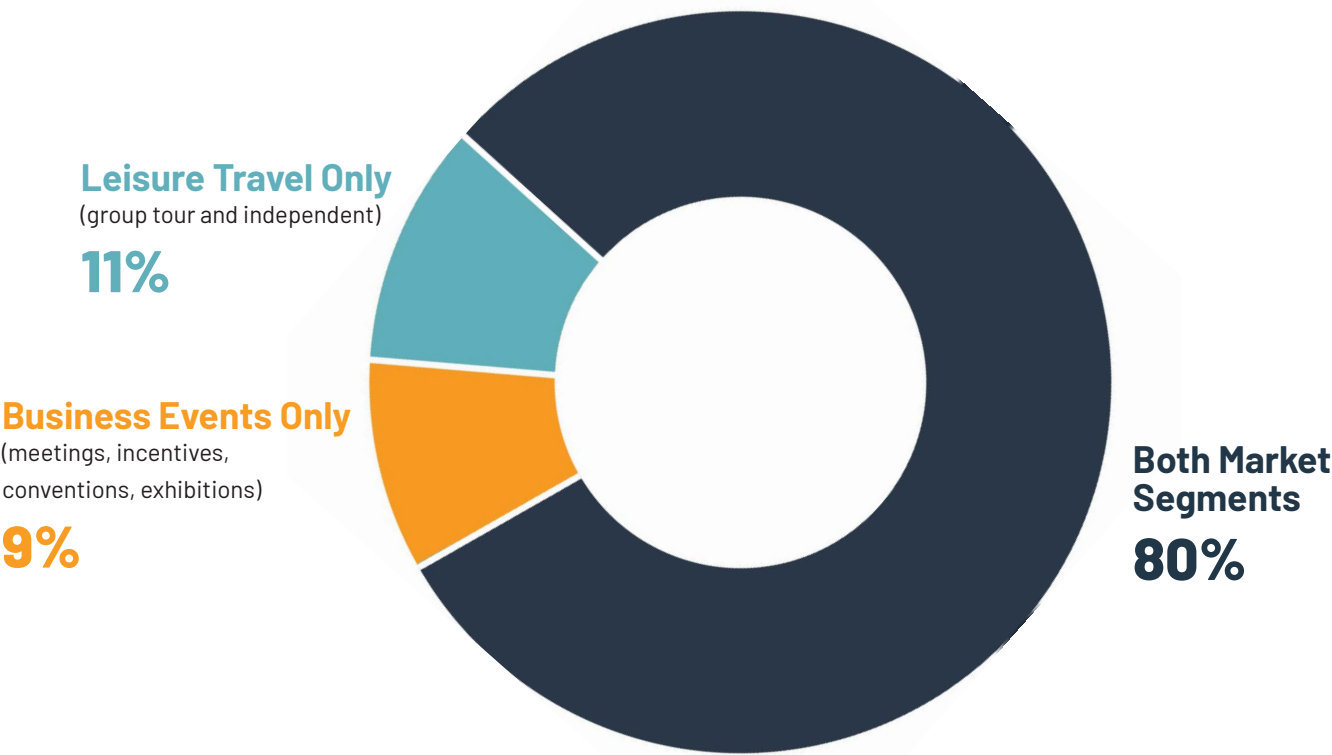
An abstract graphic on a blue background featuring a network of white lines and dots. The lines connect various points, creating a web-like structure that is more prominent on the left side and fades towards the right. The dots are small and white, serving as nodes in the network.

2025 FUTURES STUDY

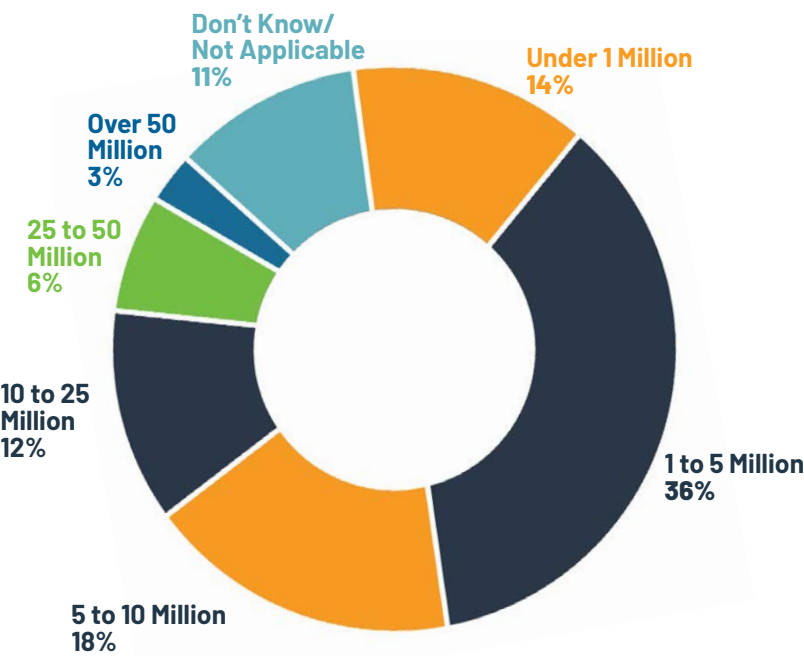
APPENDIX A

Survey Profile

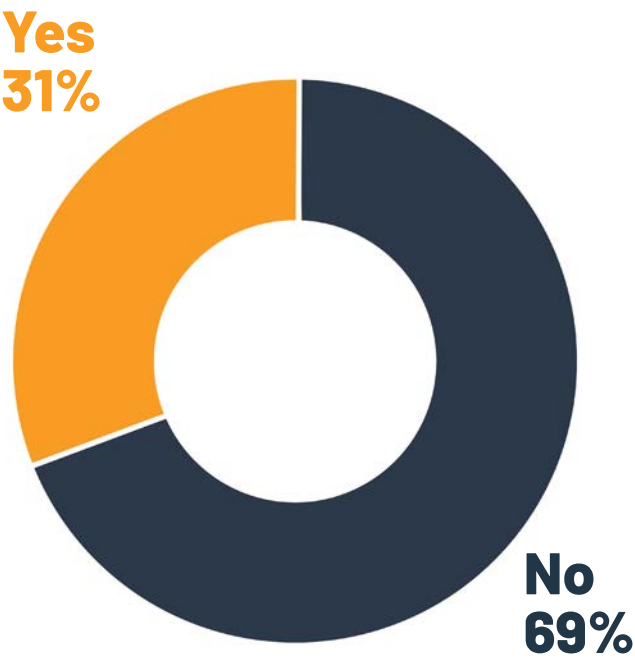
Market Segment



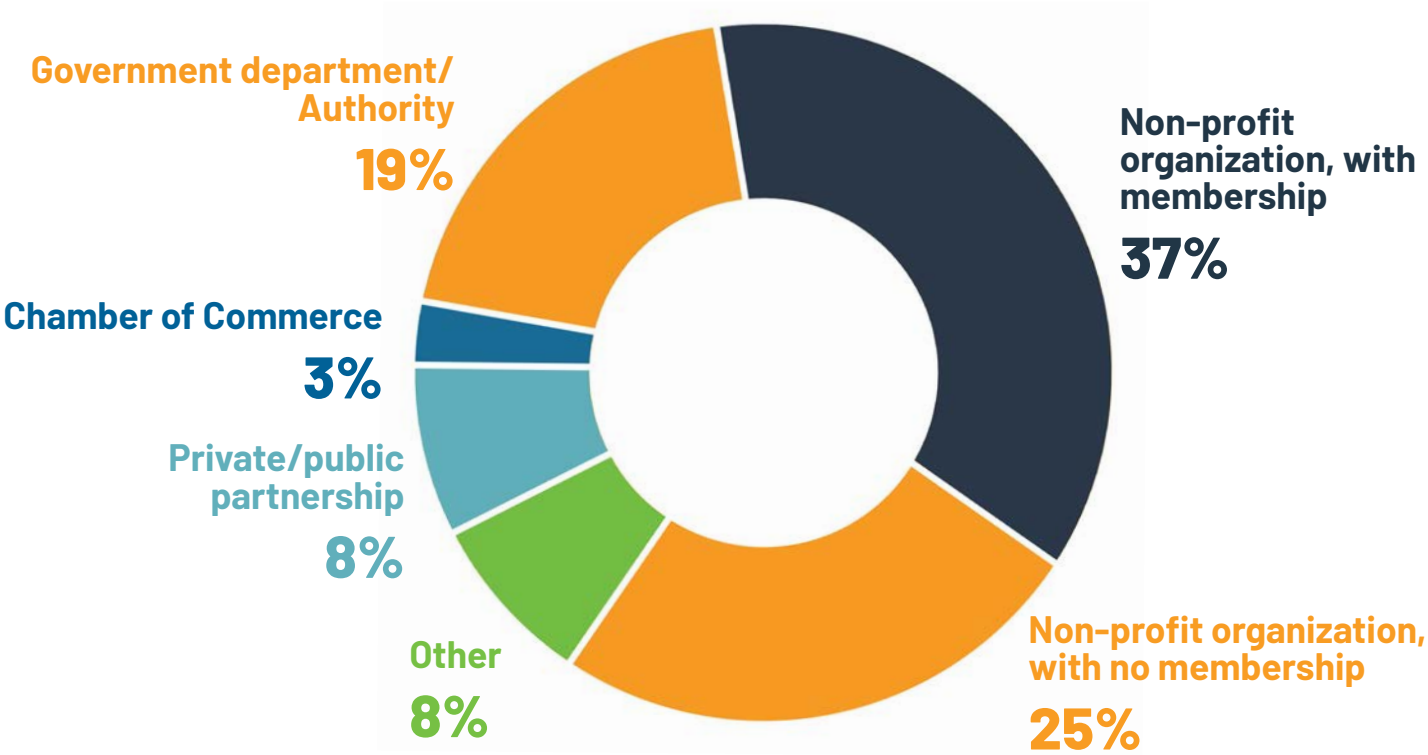
2024 Visitors



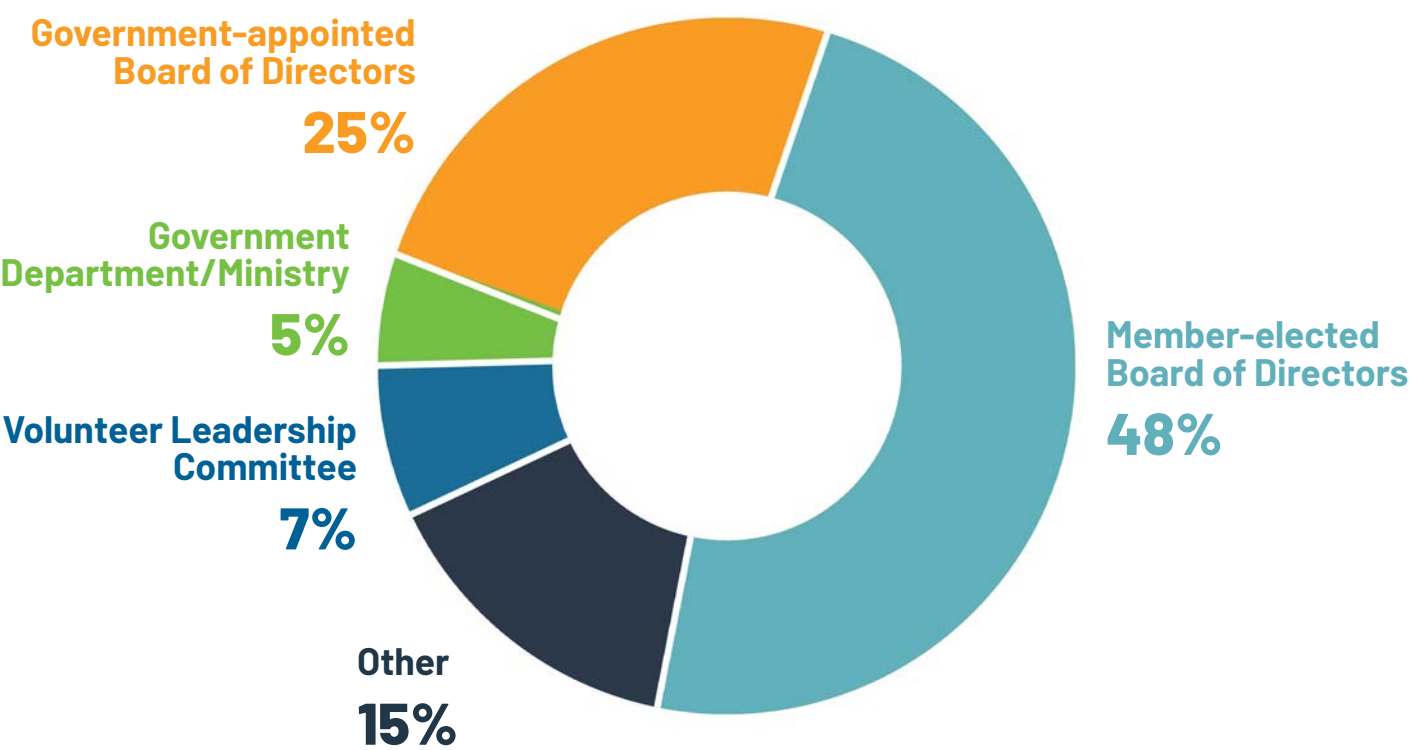
Facilities



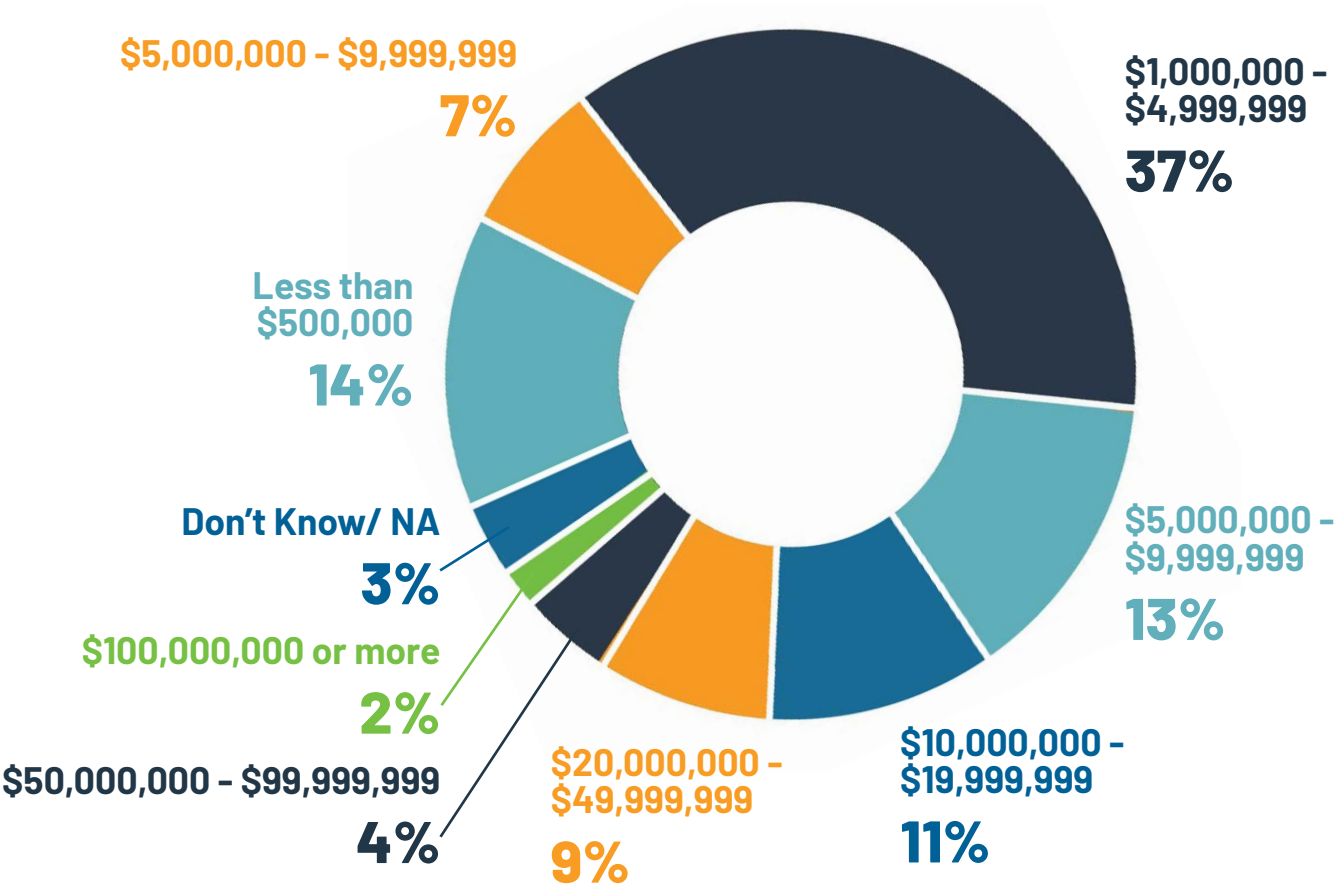
Business Model



Governance Model



Budget Profile



Is any of your current funding at risk of being reduced or eliminated in the next three years?



The background of the slide features a dark blue gradient with a faint, abstract network diagram. This diagram consists of several circular nodes of varying sizes, connected by thin, light blue lines that form a complex web of connections. The nodes are distributed across the slide, with a higher concentration in the lower-left and lower-right areas, while the upper-left area is more sparsely populated.

APPENDIX B

Top 25 Trends

Top 25 Trends

	Rank	2023
Tourism needs increased advocacy and recognition from government to grow economic impact	1	new
Industry leaders need multi-dimensional KPIs that go beyond traditional economic metrics to effectively measure and communicate the industry's full economic, social, and environmental value	2	new
Greater industry, community and government alignment is driving destination competitiveness and brand	3	5
Domestic and regional tourism is becoming a more critical driver of destination resilience and growth	4	new
Resident sentiment and community engagement are critical to maintaining destination alignment	5	6
The future desirability of downtowns depends on their evolution into vibrant, multi-use experience districts that attract residents, workers, and visitors alike	6	new
Destination Organization must proactively manage Board and stakeholder expectations as their roles and responsibilities continue to evolve	7	new
Preserving authenticity and distinctiveness is becoming critical as similar or standardized tourism offerings threaten destination brand value and visitor attachment	8	2
Geopolitical tensions and nationalism are rapidly altering global travel flows, as travelers seek destinations perceived as safe and welcoming	9	new
Destinations are prioritizing visitors who deliver greater economic, cultural, and environmental value, rather than simply pursuing volume growth	10	4
Industry must address skilled labor shortages, labor pipelines, and generational workplace shifts	11	7
Communities expect to be more engaged in destination, product and experience development for locals and visitors	12	3
Destination Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources	13	new
Destination Organizations are increasing their focus on sports tourism and major cultural events for short and long-term diversification of the visitor market	14	25

Top 25 Trends

	Rank	2023
Public scrutiny of destination funding is rising, with government allocations and/or industry-generated taxes and levies increasingly at risk of diversion	15	new
The rise of generative AI is disrupting traditional destination marketing models	16	new
Destination Organizations must adapt to the preferences of younger travelers by evolving and diversifying their market approaches to capture this generation’s growing spending power	17	new
Destination storytelling is increasingly shaped by visitors and local creators, reducing the control traditional DMOs have over brand narratives	18	14
Destinations are focusing on improving accessibility for travelers of all abilities	19	21
Shifts in international travel patterns are requiring destinations to diversify and adapt their market approaches	20	new
Competition among destinations is increasing incentives and subvention funds for business events, cultural events and sports tourism	21	37
The housing crisis is straining workforce availability in the tourism industry	22	34
The rise of the “anytime, anywhere traveler” is blurring the lines between business and leisure, with remote work enabling more frequent, extended, and blended travel experiences	23	42
Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts	24	4
Rising social challenges and visible urban issues are harming visitor perceptions and weakening both destination brand integrity and economic growth	25	32

The background of the slide features a dark blue gradient with a faint, abstract network diagram. This diagram consists of several circular nodes connected by thin, light blue lines, creating a web-like structure that spans the entire page. The nodes are of varying sizes and are positioned at various points, with some having more connections than others.

APPENDIX C

Top 25 Strategies

Top 25 Strategies

	Rank	2023
Develop the destination brand rooted in the community's goals, values and creative energy to deliver authentic experiences for the customer	1	4
Lead destination advocacy by strengthening government relations to shape supportive policies	2	17
Strengthen local community engagement and sentiment to build sustainable support for the visitor economy	3	18
Safeguard existing revenue streams while exploring diverse funding sources to maintain and expand financial stability	4	1
Better align tourism and economic development	5	3
Develop and lead a comprehensive destination master plan that defines long-term strategy while integrating product development initiatives	6	6
Establish multi-dimensional data-driven KPIs to measure and enhance both economic and social impacts of a sustainable visitor economy	7	16
Leverage data management capabilities and innovative technologies, including generative AI, to enhance business intelligence, marketing, and community engagement	8	43
Embrace adaptability by developing strategies with flexible initiatives that can adjust to a range of potential futures and disruptions	9	new
Develop and support new events that enhance destination brand, attract visitors, and support the local economy	10	14
Expand organizational mandate to align visitor experiences with resident quality of life and community relevance	11	10
Strengthen organizational talent through increased investment in building and maintaining a skilled, motivated, and loyal workforce	12	12
Ensure clarity on Board roles, development and governance	13	26
Lead initiatives that improve accessibility for people of all abilities throughout the destination	14	25
Increase efforts to develop the region's sports tourism market	15	21

Top 25 Strategies

	Rank	2023
Lead initiatives to promote tourism as a career path to address industry workforce shortages	16	20
Leverage our region's priority economic sectors to generate business events	17	19
Develop and implement sustainable tourism practices to help protect and steward the natural environment	18	29
Expand support for local arts and cultural organizations	19	28
Increase use of incentives to attract business events, cultural events and/or sports tourism	20	37
Evaluate and increase readiness to host major events	21	new
Support improvement of regulatory compliance including short-term rentals	22	42
Foster neighborhood development through enhanced support and promotion for local small businesses and community groups	23	24
Pay close attention to safety, health, and security as a strategic consideration	24	34
Develop a more comprehensive crisis management strategy	25	40

APPENDIX D

An abstract graphic featuring a network of interconnected nodes and lines, rendered in a light orange color against a darker orange background. The nodes are represented by small circles, and the lines are thin, creating a web-like structure that spans the entire page.

Regional Comparison

Trends by Region

	USA	CANADA	LATAM	ASIA PACIFIC	EMEA
1. Tourism needs increased advocacy and recognition from government to grow economic impact	1	1	1	3	3
2. Industry leaders need multi-dimensional KPIs that go beyond traditional economic metrics to effectively measure and communicate the industry's full economic, social, and environmental value	3	2	2	12	2
3. Greater industry, community and government alignment is driving destination competitiveness and brand	6	5	3	7	4
4. Domestic and regional tourism is becoming a more critical driver of destination resilience and growth	2	13	9	11	28
5. Resident sentiment and community engagement are critical to maintaining destination alignment	7	6	11	1	9
6. The future desirability of downtowns depends on their evolution into vibrant, multi-use experience districts that attract residents, workers, and visitors alike	4	17	8	15	16
7. Destination Organization must proactively manage Board and stakeholder expectations as their roles and responsibilities continue to evolve	5	14	14	10	22
8. Preserving authenticity and distinctiveness is becoming critical as similar or standardized tourism offerings threaten destination brand value and visitor attachment	9	7	10	8	14
9. Geopolitical tensions and nationalism are rapidly altering global travel flows, as travelers seek destinations perceived as safe and welcoming	8	8	15	18	5
10. Destinations are prioritizing visitors who deliver greater economic, cultural, and environmental value, rather than simply pursuing volume growth	14	4	17	5	1
11. Industry must address skilled labor shortages, labor pipelines, and generational workplace shifts	12	26	6	4	10
12. Communities expect to be more engaged in destination, product and experience development for locals and visitors	16	9	4	9	20
13. Destination Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources	13	20	7	17	8

Trends by Region

	USA	CANADA	LATAM	ASIA PACIFIC	EMEA
14. Destination Organizations are increasing their focus on sports tourism and major cultural events for short and long-term diversification of the visitor market	10	11	18	25	21
15. Public scrutiny of destination funding is rising, with government allocations and/or industry-generated taxes and levies increasingly at risk of diversion	11	25	26	24	12
16. The rise of generative AI is disrupting traditional destination marketing models	18	3	12	26	25
17. Destination Organizations must adapt to the preferences of younger travelers by evolving and diversifying their market approaches to capture this generation's growing spending power	15	22	16	19	23
18. Destination storytelling is increasingly shaped by visitors and local creators, reducing the control traditional DMOs have over brand narratives	17	12	21	22	13
19. Destinations are focusing on improving accessibility for travelers of all abilities	19	15	20	13	11
20. Shifts in international travel patterns are requiring destinations to diversify and adapt their market approaches	22	16	5	6	18
21. Competition among destinations is increasing incentives and subvention funds for business events, cultural events and sports tourism	21	24	22	20	15
22. The housing crisis is straining workforce availability in the tourism industry	20	10	28	28	24
23. The rise of the "anytime, anywhere traveler" is blurring the lines between business and leisure, with remote work enabling more frequent, extended, and blended travel experiences	23	27	19	14	17
24. Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts	25	21	23	2	7
25. Rising social challenges and visible urban issues are harming visitor perceptions and weakening both destination brand integrity and economic growth	24	19	24	23	26

Strategies by Region

	USA	CANADA	LATAM	ASIA PACIFIC	EMEA
1. Develop the destination brand rooted in the community's goals, values and creative energy to deliver authentic experiences for the customer	1	3	13	4	4
2. Lead destination advocacy by strengthening government relations to shape supportive policies	2	5	2	6	10
3. Strengthen local community engagement and sentiment to build sustainable support for the visitor economy	4	7	12	5	17
4. Safeguard existing revenue streams while exploring diverse funding sources to maintain and expand financial stability	3	8	8	11	30
5. Better align tourism and economic development	5	13	5	3	3
6. Develop and lead a comprehensive destination master plan that defines long-term strategy while integrating product development initiatives	7	1	9	1	8
7. Establish multi-dimensional data-driven KPIs to measure and enhance both economic and social impacts of a sustainable visitor economy	6	4	11	2	2
8. Leverage data management capabilities and innovative technologies, including generative AI, to enhance business intelligence, marketing, and community engagement	8	2	3	7	14
9. Embrace adaptability by developing strategies with flexible initiatives that can adjust to a range of potential futures and disruptions	9	12	16	10	11
10. Develop and support new events that enhance destination brand, attract visitors, and support the local economy	13	6	1	9	16
11. Expand organizational mandate to align visitor experiences with resident quality of life and community relevance	10	9	21	19	9
12. Strengthen organizational talent through increased investment in building and maintaining a skilled, motivated, and loyal workforce	11	11	22	8	15
13. Ensure clarity on Board roles, development and governance	12	10	26	16	23
14. Lead initiatives that improve accessibility for people of all abilities throughout the destination	16	17	23	13	12
15. Increase efforts to develop the region's sports tourism market	14	15	28	26	34

Strategies by Region

	USA	CANADA	LATAM	ASIA PACIFIC	EMEA
16. Lead initiatives to promote tourism as a career path to address industry workforce shortages	17	23	10	20	13
17. Leverage our region’s priority economic sectors to generate business events	18	16	7	18	7
18. Develop and implement sustainable tourism practices to help protect and steward the natural environment	20	14	15	12	5
19. Expand support for local arts and cultural organizations	15	20	19	27	24
20. Increase use of incentives to attract business events, cultural events and/or sports tourism	21	18	14	15	1
21. Evaluate and increase readiness to host major events	22	21	4	23	21
22. Support improvement of regulatory compliance including short-term rentals	19	32	29	31	28
23. Foster neighborhood development through enhanced support and promotion for local small businesses and community groups	23	33	20	14	31
24. Pay close attention to safety, health, and security as a strategic consideration	25	31	18	17	18
25. Develop a more comprehensive crisis management strategy	24	26	25	24	

APPENDIX E



Global Advisory Council Members



Global Advisory Committee

Destinations International and MMGY NextFactor would like to thank the Destinations International Foundation for support of this project and the members of the DestinationNext 2025 Global Advisory Committee, which was established to lead this important industry initiative.

Regional Co-Chairs

Melvin Tennant
Meet Minneapolis

Martha Sheridan
Meet Boston

Nancy Small
Tourism Richmond

Victoria Clarke
Tourism Mississauga

Yrjötapio (Y.T.) Kivisaari
Visit Oulu

Darío Flota Ocampo
Yucatan Travel

Peter Lee
Goyang Convention &
Visitors Bureau

Advisory Group Members

Asia Pacific

Leonie Ashford
Tourism New Zealand Business Events

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Thailand Convention & Exhibition
Bureau

Shin Nakamura
ANA Research

Shin Osuka
Japan Travel & Tourism Association

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Destination Toronto

Royce Chwin
Discover Vancouver

Paul Nursey
Discover Greater Victoria

Paul Bugge
Destination St John's

Alisha Reynolds
Tourism Calgary

Leslie Bruce
Banff & Lake Louise Tourism

Barrett Fisher
Tourism Whistler

EMEA (Europe, Middle East & Africa)

Peter de Wilde
Visit Flanders

Rory Archibald
Visit Scotland

Bettina Reventlow-Mourier
Wonderful Copenhagen

Matthias Schultze
German Convention Bureau

Maya Janssen
Amsterdam & Partners

Patricia Yates
Visit Britain

Petra Stusek
Ljubljana Tourism

Fiorenza Lipparini
Milano & Partners

Daniela Kolesa
Vienna Tourist Board

Kerstin Bock
Visit Berlin

Adrien Genier
Geneva Tourism & Convention
Foundation

Rosa Bada
Barcelona Turisme

Sam Johnson
Dublin Convention Bureau

Jonathan Gomez
Málaga Tourism Authority

Eric van Essen
Rotterdam & Partners

Christine Schoenbuber
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Baden-Württemberg

Anders Nyland
Visit Bergen

Ross McAuley
Play Qiddiya

South/Central America & Caribbean

Jacqueline Mora
Tourism Ministry Dominican Republic

María José Abuabara
ProColombia

Francisco Moreno Villafuerte
Ciudad Juárez

María Clara Facionline
Cartagena de Indias CVB

Boris Iraheta
Central America Tourism Agency - CATA

David Manllo
Latin Association of CVBs

Mauricio Magdaleno
Cluster de Turismo Monterrey

Toni Sando
UNE Destinos & Visit Sao Paulo

Bruno Reis
EMBRATUR - Brazilian Tourist Board

Silvana Gomes
EMBRATUR - Brazilian Tourist Board

United States of America

Scott White
Visit Greater Palm Springs

Kyle Edmondson
Visit Lake Charles

Stacy Brown
Visit Shreveport-Bossier

Angela Val
Visit Philly

Kathleen Davis
Texas Association of Convention and
Visitor Bureaus

Tammy Canavan
Visit Seattle

Marcus Carney
Visit Yuma

Sarah Howard
Visit Pleasant Prairie

Vicki Cimino
Discover Newport

Bennish Brown
Visit Augusta

Julie Coker
New York City Tourism

APPENDIX F

Survey Participants

Survey Participants

Argentina

Ente de Turismo
Ciudad de Buenos Aires
Hilton Hotel M3ndoza
Mendoza Bureau
Paragonia D&M
Plan A Direccion de Eventos
Rosell Boher Lodge
Visit Buenos Aires

Australia

Art Gallery of New South Wales
City of Melbourne
Queensland Country Tourism

Austria

Vienna Tourist Board

Bolivia

CAINCO

Brazil

Brasília e Região Convention
& Visitors Bureau

Embratur

Espírito Santo Convention
& Visitors Bureau

Fundação 25 de Janeiro

GRU Convention

Interamerican

Lets Go Travel

Prefeitura Municipal de Foz do Iguaçu

Salvador Destination

Secretaria Municipal de Turismo
de Foz do Iguaçu

Unedestinos

Vaniza Schuler Consultoria

Canada

Banff & Lake Louise Tourism

Destination Canada

Destination Cape Breton

Destination Greater Victoria

Destination Markham+C37

Destination Northern Ontario

Destination St. John's

Destination Toronto

Destination Vancouver

Discover Halifax

Discover Saskatoon

Discover Surrey

Explore Edmonton

GainingEdge

Inter Ocean Inc.

Kingston Accommodation Partners

Meet PEI

Tourism Lethbridge

Ontario's Southwest Regional
Tourism Organization

Ottawa Tourism

Parksville Qualicum Beach Tourism

Regional Tourism Organization Four Inc.

Rove

RT03 Hamilton Halton Brant

RT04

Tourism Barrie

Tourism Calgary

Tourism Canmore Kananaskis

Tourism Chilliwack

Tourism Jasper

Tourism Lethbridge

Tourism Richmond

Tourism Whistler

Tourism Windsor Essex Pelee Island

Travel Alberta

Travel Drumheller Marketing
Association

Visit Mississauga

Chile

Arica Siempre Activa A.G.

Aysén Bureau

Boda de Destino

Click latam - santiago mice

Destino Lab

IP Santo Tomás

Survey Participants

Chile (continued)

Municipalidad de San Fabián
Sabor & Saber
Santiago MICE Bureau
Sernatur Región de Los Lagos
Travel MICE Solution
UTEM

Colombia

Acodres Cartagena-Bolivar
Agencia de Promoción Destino Santander
Agencia Viajes y Turismo Cartagena Magica
Alianzas para la Abundancia
Asociacion de la Industria de Ferias y Exposiciones de Colombia
Asoeventos
Bureau de Convenciones de Bogotá
Camara de Comercio de Barranquilla
Cámara de Comercio de Medellin
Canal Cartagena
Cartagena Convention Bureau
Cartagena Magica
Consultora
Corporación Turismo Cartagena de Indias
Fenalco Bolívar

Fenalco Nacional
Greater Medellín Convention & Visitors Bureau
Green Destinations Colombia
Grupo Tribo
Hotel Boutique Patio Corao
Incontacto
Invest in Santa Marta
JLQ Consulting
Ocean Brokers
Pereira Convention Bureau
ProColombia
Restaurante PaloSanto
Rodil Boutrous Sas
Royaltours
Secretaría de Turismo de Cartagena
Secretaría de Turismo y Entretenimiento de Medellín
Señora de la Candelaria y Amigos SAS
Tribo SAS
Universidad del Sinú

Costa Rica

Costa Rica Destination Management Company
Guanacaste Destination Marketing Organization
Asociación Costarricense de Profesionales en Turismo

Cuba

OPC

Denmark

Copenhagen Convention Bureau
Group NAO

Dominican Republic

Cluster Turistico y Productivo de Barahona
Eos Asociaciones
Punta Cana Corazon

Ecuador

Meet Your Way

El Salvador

Corporación Salvadoreña De Turismo
Agencia de Promoción Turística de Centroamérica- CATA
Camara de Turismode El Salvador
Federación de Empresarios Turísticos (FETUR)

Estonia

Estonian Convention Bureau

Finland

Linnan Kehitys Oy

Survey Participants

Germany

German Convention Bureau

Guatemala

Organizacion, S.A.

Honduras

Cluster MICE Tegucigalpa

Hungary

Budapest Convention Bureau

Iceland

Visit Reykjavík

Ireland

Dublin Convention Bureau

Failte Ireland

Italy

Convention Bureau Italia

Milano & Partners

Japan

Akita Inu Tourism

Akita Shirakami Tourism

Fukushima City Tourism & Convention Association

Hakone Tourist Association

Higashikishu Regional Organization

Himeji Convention & Visitors Bureau

Hiraizumi Ichinoseki DMO

Hiroshima Convention & Visitors Bureau

Izu City Industrial Promotion Council

Izu Peninsula Geopark Tourism Bureau

Japan Travel & Tourism Association

KamaishiDMC

Kirinnomachi Tourism Bureau

Maruyama Co., Ltd.

NEC Solution Innovators, Ltd.

Nozawaonsen Mountain resort bureau

Ritto Tourism Association

Sapporo Convention Bureau

Shimabara Tourism Bureau

Shiojiri City Tourism Association

SURUGA Marketing & Tourism Bureau

Tokyo Convention & Visitors Bureau

Toyohashi Visitors Convention Association

一般社団法人 三原観光協会

一般社団法人 沖縄市観光物産振興協会

一般社団法人 秩父地域おもてなし観光公社

一般社団法人せとうち観光推進機構

一般社団法人北海道江差観光みらい機構

一般社団法人富士河口湖町観光連盟

一般社団法人隠岐ジオパーク推進機構

公益財団法人 浜松・浜名湖ツーリズムビューロー

公益財団法人福岡観光コンベンションビューロー

株式会社空・道・港

鴨川観光プラットフォーム株式会社

Mexico

CNET Puebla

Visit Yucatan

Tip Tours DMC

ControlTur DMC

México Extraordinario Radio TV

Occ Querétaro

Yucatán Travel

Tree Alliance

Fideicomiso Turismo Nuevo León (OCV Monterrey)

Yucatán Meetings

ifahto

Dirección de Promoción Turística

Centro Internacional de Congresos de Yucatán

Fideicomiso Público para el Desarrollo del Turismo de Reuniones en Yucatán or Vist Yucatán

Cluster de Turismo de Monterrey

Fideicomiso De Turismo Del Estado De

Survey Participants

Mexico (continued)

San Luis Potosi

SAC

Direccion de Turismo de Ciudad Juárez

Guadalajara Convention & Visitors
Bureau

Clúster de Servicios Turísticos de
Durango

Oficina de Convenciones y
Visitantes de Monterrey

OCV Tampico

Conexa Meetings

Clúster de Turismo de Monterrey

Los Cabos Tourism Board

Nikaui Parras

Caribe Mexicano Convention
& Visitors Bureau

Dirección de Turismo de Santa
Catarina, Nuevo León

Viajes Chiapas DMC

Expressa Events

OCV Chiapas

Netherlands

Rotterdam Partners

NHL Stenden

New Zealand

Wellington NZ

Tourism New Zealand

Nicaragua

Instituto Nicaragüense de Turismo

Panama

Inadeh

Horizons Ahead

Congrex Americas

Expo Eventos de Panamá

Paraguay

Asuncion Convention & Visitors Bureau

Peru

Parro Experience

Universidad de San Martín de Porres

Produccuones Eirl

Lima Convention Bureau

Parró Producciones

Parró Experience

Buro de Convenciones de Iquitos

Portugal

Algarve Tourism Bureau

Saudi Arabia

Qiddiya Investment Company

Singapore

Singapore Tourism Board

Slovenia

Turizem Ljubljana

South Africa

Cape Town Tourism

Spain

Gubi Consulting SL

Malaga Tourism Board

Torspain

Turisme de Barcelona

Sweden

Destinations International

Malmö Convention Bureau

Switzerland

Event Design Collective GmbH

United Kingdom

Visit Belfast

Visit Scotland

Survey Participants

United States

1000 Islands International Tourism Council	Choose Lansing	Discover Green Bay
AFAR	City of Columbia Convention & Visitors Bureau	Discover Jackson
AJR Media Group	City of Lufkin	Discover Kalamazoo
Archer Strategic Partners	Clermont County Convention & Visitors Bureau	Discover Monroe–West Monroe
Auburn–Opelika Tourism	Daytona Beach Area Convention & Visitors Bureau	Discover Newport
Aurora Area Convention & Visitors Bureau	Destination Ann Arbor	Discover Puerto Rico
Bellingham Whatcom County Tourism	Destination Ann Arbor	Discover Saratoga
Beverly Hills Conference & Visitors Bureau	Destination Augusta	Discover The Palm Beaches
Birch Run Area Convention & Visitors Bureau	Destination Bryan	Discover Vail
Black Hills & Badlands Tourism Association	Destination Cleveland	Downtown Brookings
Bloomington Minnesota Travel & Tourism	Destination DC	Elkhart County Convention & Visitors Bureau
Breckenridge Tourism Office	Destination Gettysburg	Endless Mountains Visitors Bureau
Cabarrus County Convention & Visitors Bureau	Destination Madison	Experience Champaign–Urbana
Calvert County Economic Development	Destination Mansfield–Richland County	Experience Grand Rapids
Carbon County Visitors' Council	Destination Marketing/Development Consultant	Experience Kissimmee
Caribe Hilton	Destination Media, Inc	Experience Olympia & Beyond
Charlotte Regional Visitors Authority	Destination Niagara USA	Experience Prince George's
Charlottesville Albemarle Convention & Visitors Bureau	Destination North Myrtle Beach	Explore Brookhaven
Chattanooga Tourism Co.	Destination Panama City (PCCDC)	Explore Butte County
Choose Chicago	Destination Rogers	Explore Evansville
	Destinations International	Explore Fairbanks
	Discover Albany	Explore Houma
	Discover Crystal River Florida	eXplore Lawrence
	Discover Durham	Explore Minnesota
		Explore Newnan–Coweta Inc
		Explore St. Louis

Survey Participants

United States (continued)

Explore Western Mass	Gulf Shores & Orange Beach Tourism	MediaOneDigital
Finger Lakes Visitors Connection	Hamilton County Tourism Inc.	Meet Boston
Fort Smith Convention & Visitors Bureau	Hancock County Tourism & Visitor Center	Meet Minneapolis
Fox Cities Convention & Visitors Bureau	Heritage Corridor Destinations	meetNKY Northern Kentucky Tourism
Fredericksburg Convention & Visitor Bureau	Hocking Hills Tourism Association	Mt. Pleasant Area Convention & Visitors Bureau
Glacier Country Tourism Regional Tourism	Houston First Corporation	Naples, Marco Island, Everglades Convention & Visitors Bureau
Global Meetings & Tourism Specialists	Huntingdon County Visitors Bureau	New Orleans & Company
GO Laurel Highlands	Huntington Area Convention & Visitors Bureau	North Little Rock Visitors & Convention Bureau
Go Providence	Huntsville/Madison Convention & Visitors Bureau	Ocala/Marion County Visitors & Convention Bureau
Golden Isles Visitor & Convention Bureau	Huntsville/Madison County Convention & Visitors Bureau	Ohio Travel Association
Gondens International Advisors	Irving Convention & Visitors Bureau	Oklahoma City Convention & Visitors Bureau
GoProvidence	Janesville Area Convention & Visitors Bureau	Pierce County Economic Development Department
GoRockford	Kaua'i Visitors Bureau	Pocono Mountains Visitors Bureau
Great Lakes Bay Regional Convention & Visitors Bureau	Lafayette Convention & Visitors Commission	Port Aransas Tourism Bureau & Chamber of Commerce
Greater Freeport Partnership	Livingston Co. Convention & Visitors Bureau	Punta Gorda/Englewood Beach Visitor & Convention Bureau
Greater Ontario California	Los Angeles Tourism & Convention Board	Regional Office of Sustainable Tourism
Greater Raleigh Convention & Visitors Bureau	Louisiana Office of Tourism	Richmond Region Tourism
Greater Raleigh Convention and Visitors Bureau	Louisville Tourism	River Parishes Tourist Commission
Greater Wilmington Convention & Visitors Bureau	Las Vegas Convention & Visitors Authority	Shelly Green, LLC
Greenbrier County Convention and Visitors Bureau, Inc.	Maine Office of Tourism	Shipshewana/Lagrange County Visitor & Convention Bureau
	Marin Convention & Visitors Bureau	Shores & Islands Ohio

Survey Participants

United States (continued)

Shreveport-Bossier Sports Commission	Visit Annapolis & Anne Arundel County	Visit Dublin Ohio
SoIN Tourism	Visit Austin	Visit Eau Claire
Somerset County Business Partnership	Visit Baltimore	Visit Fargo-Moorhead
Steamboat Springs Chamber	Visit Bellevue	Visit Florida
Steuben County Convention & Visitors Bureau	Visit Bellingham	Visit Florida Keys/Monroe County TDC
The Happy Valley Adventure Bureau	Visit Beloit	Visit Fort Collins
The Palm Beaches	Visit Bentonville	Visit Fort Wayne
Think Iowa City	Visit Bloomington	Visit Grand Junction
This Is Cooperstown	Visit Boise	Visit Greater Lima
Tillamook Coast Visitors Association	Visit Boulder	Visit Greater Palm Springs
Town of Ocean City Maryland	Visit Brookings	Visit Hattiesburg
Travel Butler County	Visit Buffalo Niagara	Visit Haywood
Travel Juneau	Visit Camarillo	Visit Hendricks County
Travel Lane County	Visit Carlsbad	Visit Hot Springs
Travel Marquette	Visit Central Florida	Visit Indy
Travel Michigan	Visit Charlevoix	Visit Ithaca
Travel Santa Ana	Visit Cheyenne	Visit Joplin Convention & Visitors Bureau
Traverse City Tourism	Visit Chicago Southland	Visit Kansas City Kansas
Trumbull County Tourism	Visit Cincy	Visit KC
Tulsa Regional Tourism	Visit Clarksville	Visit Lafayette - West Lafayette
Veneto Collaboratory	Visit College Station	Visit Lake Charles
Vermont Dept. of Tourism & Marketing	Visit Colorado Springs	Visit Lake County
Visit Alexandria	Visit Corpus Christi	Visit Las Cruces
Visit Anaheim	Visit Dallas	Visit Lauderdale
Visit Anchorage	Visit Dana Point	Visit Lenawee
	Visit Denver	Visit Lodi

Survey Participants

United States (continued)

- Visit Longmont
- Visit McMinnville
- Visit Mesa
- Visit Milwaukee
- Visit Mobile
- Visit Mooresville
- Visit Muskegon
- Visit Myrtle Beach
- Visit NC
- Visit Newport Beach
- Visit Ogden
- Visit Omaha
- Visit Overland Park
- Visit Panama City Beach
- Visit Pasadena
- Visit Phoenix
- Visit Quad Cities
- Visit Raleigh
- Visit Sacramento
- Visit Salt Lake
- Visit San Jose
- Visit Sarasota County
- Visit Savannah
- Visit Seattle
- Visit Shenandoah Texas

- Visit Shreveport-Bossier
- Visit South Bend Mishawaka
- Visit Spokane
- Visit Springfield, MO
- Visit St. Pete Clearwater
- Visit Stillwater
- Visit Sun Valley
- Visit Syracuse
- Visit Tampa Bay
- Visit Temecula Valley
- Visit The Northshore
- Visit Tri-Cities
- Visit Tucson
- Visit Virginia's Blue Ridge
- Visit Watertown
- Visit Wausau
- Visit Wichita
- Visit Winston-Salem
- VisitLEX
- VisitPITTSBURGH
- Walton County Tourism
- Wert Marketing Group
- White Mountains Attractions Association
- Wilmington & Beaches Convention & Visitors Bureau
- Yakima Valley Tourism

Uruguay

- Ministerio de Turismo de Uruguay

DESTINATION
NEXT

2025

DESTINATIONS INTERNATIONAL
FUTURES STUDY

