

DESTINATION
NEXT

2025

DESTINATIONS INTERNATIONAL
FUTURES STUDY



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Managing Director



- Lead author of the 2025 DestinationNEXT Futures Study
- Led strategic planning in more than 40 destinations around the world
- CDME Board member and instructor (Destination Advocacy & Community Relations)
- Over 20 years in tourism industry
- Former VP of stakeholder relations and communications with Tourism Calgary

DESTINATION NEXT



Scenario Model

415
assessments
around the
world in five
languages

Detailed
assessment of
destination
strength and
alignment



Futures Study

Overview of trends
and strategies for
destination
organizations
worldwide

Previous
studies in
2014, 2017,
2019, 2021
& 2023

A Point in Time



Factors Beyond Our Control



Global geopolitical tensions are reshaping travel flows



Economic volatility is demanding new agility



Climate change and social challenges requiring immediate responses

Expanding Expectations



**Communities are
demanding a
greater voice in
destination shaping**



**Governments
are expecting
broader
economic impact**



**Travelers
are seeking
authenticity and
responsibility**

Evolution of the Futures Study

Past Futures Study Takeaways

2014

- Broadcast marketing to engagement
- Destination management
- Collaboration and partnerships

2017

- Curators of content
- Adopters of business intelligence
- Catalysts of economic development
- Activists in placemaking
- Collaboration

Past Futures Study Takeaways

2019

- Destination stewardship
- Community alignment
- Digital conversion

2021

- Destination alignment
- Sustainable development
- Values-based marketing

2023

2 Transformational Opportunities



**Community
Leadership**



**Technology
Adoption**

The background is a dark blue gradient with a faint, abstract network of glowing blue lines and nodes, suggesting a digital or technological theme.

**The destination landscape is
being reshaped**

Tripadvisor's New Minneapolis Tourism Improvement District Competitor

Tourism in Turmoil:
and Europe

U.S. Tourism Will Lose Up To \$29 Billion As Visitors Plummet Amid Trump Policies

Florida Tourism Change Sparks Warning:

Travel & Tourism in

sis?

Latin America

U.S. committed to success of L.A.

Could Boost

Olympics in '28, IOC says

Region's Economy

But Visa

by US\$260BN

Easing and More Air Capacity Would Help

the Next Decade

World Tourism Soars in 2025: International Tourist Arrivals Up by 5% in First Quarter

el

8 forces defining the next era of destination leadership

**Securing
Investment
Through Advocacy
and Impact**

**Navigating
Economic and
Geopolitical
Uncertainty**

**Scaling
Organizational
Capacity to Meet
Expanding
Expectations**

**Shaping Places
for People and
Prosperity**

**Reimagining
Destination
Marketing in the
Age of AI and
Authenticity**

**Driving Impact
Through
Intentional Event
Strategies**

**Advancing
Regeneration
and Building
Long-Term
Resilience**

**Building a
Future-Ready
Industry
Workforce and
Organization**

2025 FUTURES STUDY

Global Advisory Committee

Global Advisory Committee



Europe, Middle East, Africa

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Peter de Wilde
Rory Archibald
Bettina Reventlow-Mourier
Matthias Schultze
Maya Janssen
Patricia Yates
Petra Stusek
Fiorenza Lipparini
Daniela Kolesa
Kerstin Bock

Visit Oulu

Visit Flanders
 Visit Scotland
 Wonderful Copenhagen
 German Convention Bureau
 Amsterdam & Partners
 Visit Britain
 Ljubljana Tourism
 Milano & Partners
 Vienna Tourist Board
 Visit Berlin

Adrien Genier

Rosa Bada
Sam Johnson
Jonathan Gomez
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Christine Schoenbuber
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Geneva Tourism & Convention Foundation
 Barcelona Turisme
 Dublin Convention Bureau
 Málaga Tourism Authority
 Rotterdam & Partners
 Tourismus Marketing GmbH Baden-Württemberg
 Visit Bergen
 Play Qiddiya



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Leslie Bruce
Barrett Fisher

Tourism Richmond Tourism Mississauga

Tourism Ottawa
 Discover Saskatoon
 Destination Cape Breton
 Destination Toronto
 Discover Vancouver
 Discover Greater Victoria
 Destination St John's
 Tourism Calgary
 Banff & Lake Louise Tourism
 Tourism Whistler



USA

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Scott White
Kyle Edmondson
Stacy Brown
Angela Val
Tammy Canavan
Marcus Carney
Sarah Howard
Vicki Cimino
Bennish Brown
Julie Coker
Kathleen Davis

Meet Minneapolis Meet Boston

Visit Greater Palm Springs
 Visit Lake Charles
 Visit Shreveport-Bossier
 Visit Philly
 Visit Seattle
 Visit Yuma
 Visit Pleasant Prairie
 Discover Newport
 Visit Augusta
 New York City Tourism
 Texas Association of Convention and Visitor Bureaus



South/Central America & Caribbean

Dario Flota Ocampo

Jacqueline Mora
María José Abuabara
Francisco Moreno Villafuerte
María Clara Facionline
Boris Iraheta
David Manillo
Mauricio Magdaleno
Toni Sando
Bruno Reis
Silvana Gomes

Yucatan Travel

Tourism Ministry Dominican Republic
 ProColombia
 Ciudad Juárez
 Cartagena de Indias CVB
 Central America Tourism Agency - CATA
 Latin Association of CVBs
 Cluster de Turismo Monterrey
 UNE Destinos & Visit Sao Paulo
 EMBRATUR - Brazilian Tourist Board
 EMBRATUR - Brazilian Tourist Board



Asia Pacific

Peter Lee
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Shin Nakamura
Shin Osuka
Tetsuya Katajima

Goyang Convention & Visitors Bureau
 Tourism New Zealand Business Events
 Thailand Convention & Exhibition Bureau
 ANA Research
 Japan Travel & Tourism Association
 Japan Travel & Tourism Association

2025

5 Global Advisory Panels

1 Community

2 Industry

3 Customers

4 New! Unusual Suspects

5 New! Investors & Developers

2025 Global Industry Survey

537

Participants

36

Countries

Trends Capturing Attention & Energy

TOP 10 TRENDS

- 1 NEW** Tourism needs increased advocacy and recognition from government to grow economic impact
- 2 NEW** Need for 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** Greater industry, community and government alignment is driving destination competitiveness and brand
- 4 NEW** Domestic and regional tourism is becoming a more critical driver of destination resilience and growth
- 5 -1** Resident sentiment and community engagement are critical to maintaining destination alignment
- 6 NEW** The future desirability of downtowns depends on their evolution into vibrant, multi-use experience districts that attract residents, workers, and visitors alike
- 7 NEW** Destination Organizations must proactively manage Board and stakeholder expectations as their roles and responsibilities continue to evolve
- 8 -6** Preserving authenticity and distinctiveness is becoming critical as similar or standardized tourism offerings threaten destination brand value and visitor attachment
- 9 NEW** Geopolitical tensions and nationalism are rapidly altering global travel flows, as travelers seek destinations perceived as safe and welcoming
- 10 -6** Destinations are prioritizing visitors who deliver greater economic, cultural, and environmental value, rather than simply pursuing volume growth

Funding is at Risk

42% report funding at risk in the next 3 years
(up from 37% in 2023)

The advocacy imperative:

Destination Organizations need to evolve from passive recipients to assertive champions



How the Industry is Responding

TOP 10 STRATEGIES

- 1** **+3** Develop the destination brand rooted in the community's goals, values and creative energy to deliver authentic experiences for the customer
- 2** **+15** Lead destination advocacy by strengthening government relations to shape supportive policies
- 3** **+15** Strengthen local community engagement and sentiment to build sustainable support for the visitor economy
- 4** **-3** Safeguard existing revenue streams while exploring diverse funding sources to maintain and expand financial stability
- 5** **-2** Better align tourism and economic development
- 6** **NEW** Develop and lead a comprehensive destination master plan that defines long-term strategy while integrating product development initiatives
- 7** **+9** Establish multi-dimensional data-driven KPIs to measure and enhance both economic and social impacts of a sustainable visitor economy
- 8** **+35** Leverage data management capabilities and innovative technologies, including generative AI, to enhance business intelligence, marketing, and community engagement
- 9** **NEW** Embrace adaptability by developing strategies with flexible initiatives that can adjust to a range of potential futures and disruptions
- 10** **+4** Develop and support new events that enhance destination brand, attract visitors, and support the local economy

**Destination Organizations are
fundamentally transforming.**

**Destination development is
driving that transformation.**

84%

**Number of global
Destination Organizations
actively involved in
destination development**



How is your organization involved in destination development?

(select all that apply)

Educating industry on how to develop product/support business case development

13%

Fostering partnerships with stakeholders, funders, developers, brands and government

19%

Working with developers to support experiential assets

13%

Advocacy
15%

Supporting air service development

10%

Leading accessibility programs and initiatives

7%

1% Others

Investment and funding
9%

Leading destination master planning

14%

Defining Destination Development

Destination development is the strategic art of shaping and enhancing places to deliver exceptional visitor experiences, foster local pride, and drive economic vitality.

It prioritizes creative placemaking, meaningful community collaboration, and innovative tourism investments to build vibrant and resilient destinations.

Core functions of destination development:

**Data
intelligence**

**Government
relations +
advocacy**

**Community
partnerships**

**Investment
readiness**

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4 Game-Changing Shifts

1

**AI +
Authenticity
Revolution**

Generative AI is transforming content creation and personalization.

Authenticity is more valuable than ever. We need local voices driving the narrative.

2

“Places for People” Strategies

**Downtowns should be
reimagined as experience
districts.**

**Investment attraction will
flow from and through a
compelling destination vision.**

3

Regenerative Tourism Leadership

84% of travelers consider sustainability important.

Multi-dimensional KPIs beyond traditional economic metrics are now necessary.

4

Crisis-Ready Organizations

**Adaptable implementation
is replacing rigid planning.**

**Workforce challenges
are requiring strategic
responses.**

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4 Critical Actions

1

Secure Your Future Through Advocacy

**Build
government
relationships
proactively**

**Demonstrate
community
value
consistently**

**Diversify or
augment funding
while protecting
public investment**

2

Scale Your Organizational Capacity

**Define core
mandate clearly to
avoid scope
creep**

**Build
cross-sector
partnerships
strategically**

**Leverage AI
strategically to
achieve
organizational
goals**

3

Master the Technology-Authenticity Balance

**Develop AI
usage
policies and
team fluency**

**Ground
brand
strategies in
local identity**

**Measure
connection,
not just
impressions**

**Enable
community-
driven
storytelling**

4

Build for Long-Term Resilience

**Embrace
adaptability
as core
capability**

**Invest in
talent
development
and retention**

**Lead
regenerative
tourism
initiatives**

**Prepare for
ongoing
uncertainty**

Leading the Transformation

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

Organization Role	Current	Future
Destination marketing	1	1
Brand management	2	2
Community relations and partnership	3	6 ↓
Destination information resource	4	8 ↓
Data research and business intelligence	5	3 ↑
Government relations and policy development	6	5
Destination and product development	7	4 ↑
Industry advocate	8	7
Visitor services	9	13
Meetings and conventions sales	10	9
Leisure sales	11	11
Broader economic development	12	10
Sports tourism development and promotion	13	12
Environmental stewardship	14	17
Equity, Diversity, Inclusion leadership	15	20
Major event partner and developer	16	16
Workforce development	17	15
Crisis management and emergency preparedness	18	18

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

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

**The path forward requires
courage, clarity, and
collaboration.**

For Leaders

**Audit your organization's
readiness across the 8 forces.**

**Securing
Investment
Through Advocacy
and Impact**

**Navigating
Economic and
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For Leaders

Audit your organization's readiness across the 8 forces.

Invest in AI literacy and authentic storytelling.

Strengthen advocacy capabilities immediately.

Build resident engagement into every strategy.

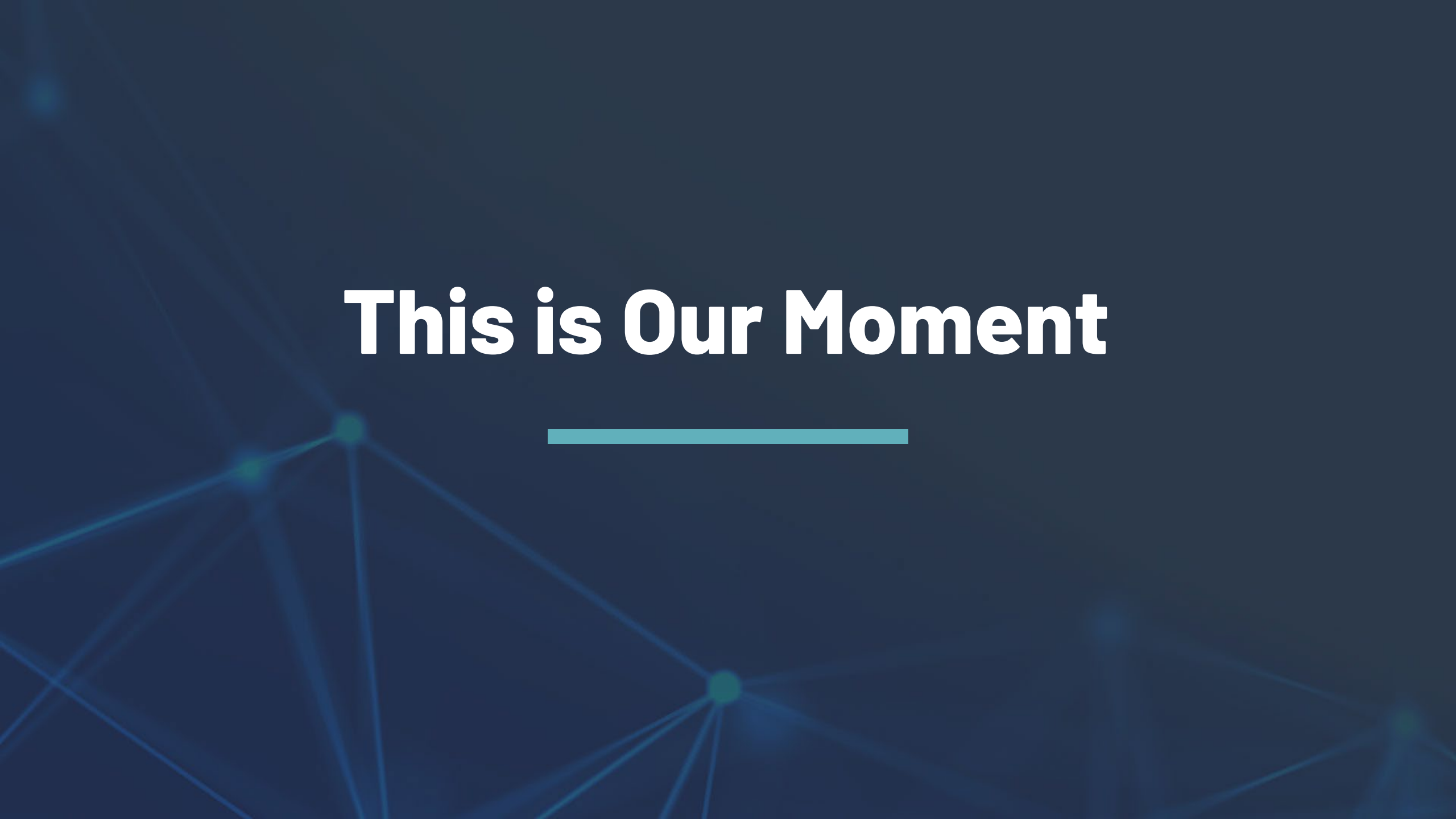
For the Industry

Collaborate on shared challenges (workforce, sustainability, advocacy).

Share best practices and innovative solutions.

Support industry-wide standards and frameworks.

Champion tourism's role in community prosperity.

The background is a dark blue gradient with a faint, abstract network of glowing blue lines and nodes, suggesting a digital or technological theme.

This is Our Moment

**We are community leaders,
place-shapers,
and change agents.**

**Will your destination be
stronger, more resilient, and
more valued by your community
three years from now?**

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

**The transformation is not optional,
and it's underway.**

What will be your role in leading it?

Questions?



SCAN TO DOWNLOAD

THANK YOU!



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