

5 Megatrends Reshaping International Tourism in 2025





01 Sustainability and responsible tourism 02 Tech-driven innovation through data and Al 03 Next-level personalisation



04 Human-centric travel experiences 05 Resilience and crisis management



What's in store for the travel industry in 2025?

The travel industry is undergoing rapid transformation in 2024, a trend that shows no signs of slowing as we move into 2025.

AI, big data, and IoT are undoubtedly at the forefront of this transformation. Technology now plays a central role in driving smarter, more efficient decisionmaking, while travellers increasingly rely on social media and AI to plan their trips, making **personalised experiences** easier to access than ever before.

And yet, despite these technological advances, there's a growing desire for more authentic, **human experiences**.

Wellness retreats, solo adventures, and community-based tourism are on the rise, driven by a growing focus on mental well-being and a desire for more meaningful, authentic experiences in an increasingly fast-paced and digital world.

Sustainability remains a key focus as destinations look to protect local communities and preserve their environments, using measures like tourist taxes to tackle overtourism.

At the same time, rising global uncertainty is pushing destinations to prioritise **resilience and crisis management**, diversifying markets and investing in sustainable infrastructure to safeguard both tourism and local communities.



As the travel industry evolves, the balance between technology, sustainability, and human connection will define its future.

With a growing focus on well-being, authenticity, and resilience, destinations are adapting to meet the shifting needs of travellers.

Looking ahead to 2025, how the industry blends innovation with sustainability will be crucial in ensuring its long-term success and the well-being of the communities it relies on.

"The convergence of data, technology, and evolving traveller expectations is reshaping travel in 2024. Destinations that can use these forces effectively will not only offer personalised experiences but will also focus on sustainability, resilience, and human connection. It's about finding the right balance between tech-driven convenience and authentic, meaningful travel experiences that are responsible and adaptable to the challenges of a changing world."

Mirko Lalli, Founding CEO @ The Data Appeal Company

In this ebook, we'll dive into the five key macrotrends set to shape the travel landscape in 2025:

Sustainability and responsible tourism

- Tech-driven innovation through data and AI
- Personalisation
- Human-centric travel experiences
- **Resilience and crisis management**

We also included actionable insights within each trend for you to not only keep up with the times, but stay ahead of them too.

01. Sustainability and responsible tourism

In 2024, overtourism has become a major challenge for destination managers. Overcrowding, rising costs, and declining experiences for both locals and visitors are raising serious concerns about the long-term future of tourism. This growing issue is reflected in public interest—**Google searches for overtourism have surged from 380,000 results in 2023 to over 2 million in 2024** (as of this writing).

As the problem intensifies, it's clear that destinations must act to manage visitor numbers and balance tourism's economic benefits with sustainability.

Measures such as **capacity limits**, **promoting off-season travel**, and **marketing lesser-known destinations** are essential for easing overcrowding.



Destinations worldwide are taking steps to promote sustainability and manage overtourism through a mix of cultural preservation, infrastructure investments, and eco-friendly initiatives.

Cultural and environmental preservation

New Zealand is integrating Māori cultural values into tourism, while **Bhutan** has adopted a "High-Value, Low-Volume" model, using daily fees to protect its culture and environment.

Tourist taxes and fees

Venice, Italy has introduced a €5 entry fee for tourists and regulates group tours to protect the city's heritage. Barcelona, Spain has increased taxes on cruise tourism to fund infrastructure improvements. Santorini and Mykonos, Greece, now charge a €20 cruise passenger fee to support environmental preservation. Florence, Italy has implemented a 10-point sustainability plan, including regulating short-term rentals and restricting megaphone use in UNESCO areas.

Infrastructure and urban management

Hallstatt, Austria is limiting tourist buses to reduce pressure on residents. **Labuan Bajo, Indonesia** is investing in sustainable infrastructure to balance economic growth with environmental protection.

Eco-friendly tourism promotion

The Azores, Portugal is promoting eco-friendly tourism, aligning with its commitment to protect 25% of the region's land.

These efforts reflect a growing commitment within the travel industry to balance tourism with sustainability, ensuring both the preservation of local communities and the environment.

Consumers are increasingly aware of the environmental, social, and cultural impacts of tourism too. According to a study by <u>Booking.com</u>, **83% of travellers** confirm that sustainable travel is important to them, and **75% say they want to travel more sustainably in the next 12 months.**

Despite the growing demand for sustainable options, **28% of travellers say sustainability isn't always a top priority when booking a trip**, highlighting that while progress is being made, there's still work to be done.

The travel industry is making significant strides toward more sustainable practices.

The airline sector, responsible for approximately 75% of tourism's carbon emissions (half of which comes from air transport), is focusing on strategies to reduce its impact.

According to a <u>report by the World Economic Forum</u>, the airline industry is focusing on four key strategies to **achieve carbon neutrality by 2050** — green fuel, carbon offsets, hydrogen power, and electric planes.



Some major airlines are making bold pledges:



Delta Air Lines has committed \$1 billion to become carbon neutral by 2030

JetBlue has pledged to become carbon neutral by 2040, and United Airlines by 2050



KLM has pledged to <u>reduce its carbon footprint by 15% by</u> 2030

Similarly, some hotels are also taking additional steps to reduce their carbon footprint.

For example:

Hilton has pledged to reduce its carbon emissions by 61% by 2030

Marriott International has committed to reducing its greenhouse gas emissions by 30% by 2025

Accor has pledged to reduce its carbon footprint by 50% by 2025.

"Sustainability in tourism requires more than just green initiatives—it demands a fundamental shift in how destinations manage growth, respect the environment, and prioritise local communities. DMOs must use data not only to understand but to actively shape the future, ensuring that tourism thrives in harmony with nature and culture, securing long-term benefits for both residents and visitors alike."

- Mirko Lalli, Founder and CEO at The Data Appeal Company



Vilnius 2025: Embracing sustainability as the European Green Capital

A notable example of a destination leading the way in sustainability is Vilnius, Lithuania, which will be awarded the title of <u>European Green</u> <u>Capital in 2025</u>. This recognition highlights the city's commitment to sustainability, with efforts to reduce emissions through renewable energy sources and a focus on sustainable infrastructure.

Vilnius has also set a target to become climate neutral by 2030. The city is engaging citizens in sustainability efforts through a techoriented approach, including an app that allows residents to participate in city planning and management, making sustainability a collective effort. By prioritising clean air, water, biodiversity, and green spaces, Vilnius is demonstrating how sustainability can enhance both the environment and residents' quality of life.

With its motto, "Vilnius – the greenest city in the making," the city is setting a benchmark for others to follow.

5 practical steps to embrace sustainability in 2025:



Develop and implement eco-friendly practices: Introduce, or improve on renewable energy and waste reduction measures, and where possible, invest in green infrastructure for sustainable tourism.



Support local communities: Work with local businesses and artisans, and contribute to community initiatives and cultural preservation.

Educate travellers: Research carried out by <u>Visa and Oxford</u> <u>Economics</u> revealed that 41% of travellers feel they lack information about sustainable travel options. Empower travellers with information on responsible practices, and cultivate awareness about cultural sensitivities.

Promote sustainable transportation: Advocate for and promote sustainable transportation options like public transport, and invest in low-emission vehicles to reduce carbon footprint.

Collaborate with sustainability travel influencers: Social media is playing a vital role in the travel industry. Partner with influencers promoting sustainable values, and leverage influencer reach to educate a broader audience.



02. Tech-driven innovation through data and Al

It's hard to look to the future without imagining the role technology will play in it.

From sustainability and resource management to personalisation and beyond, technology such as AI and data is moulding the travel industry in a way no other tool has before.

And 2025 will bring about further advancements and improvements.

The role of AI

AI has taken the world by storm, and is revolutionising numerous industries, including travel — enhancing every aspect of the journey from planning to post-trip experiences.

People are increasingly relying on AI for **personalised recommendations**, especially when planning their trips.



According to recent <u>research by Marriott</u>, in the UK, 19% of adults have used AI tools to plan or research trips, a number that rises to 39% among 18-34year-olds. 93% reported it influenced their decisions, including booking recommended accommodations (25%), travel timing (25%), and food options (24%).

Chatbots and virtual assistants, commonly used in the industry, have turned into automated AI assistants. They make customer interactions **smoother**, **provide instant help, and improve overall customer service**.

Google promises you can leverage its AI chatbot <u>Gemini</u> to build an entire vacation itinerary 'in a matter of seconds': this tool can blend personal information, like flights and hotel bookings, with publicly available details to build multiday itineraries in no time.

Ewout Steenbergen, chief financial officer of Booking Holdings, shared Booking.com's future <u>expectations and projects</u>:

"Our teams are saying that decision making has become slower and the reasons why is we have been adding so many new initiatives over the last few years, from flights to payments to many other activities. We need to be able to facilitate payments underneath, put the gen AI tools on top of it. AI is the perfect element to make the real connected trip come to life. We have the data and background of you as a traveler. We know what you're looking for, what you've done in the past, what you don't like. We can build that whole itinerary for you. We can make sure it's immediately bookable, and we know availability."

And we're just at the beginning of this <u>Fourth Industrial Revolution</u>. In this year, we'll see more creative applications for AI.

For instance, **Samsung's flagship Galaxy phones** now includes an <u>AI-</u> <u>powered live translation of calls</u>, AI Live Translate Call— **a native call feature**, which removes the need for third-party apps.

One other striking example is the innovative approach taken to address the environmental impact of contrail clouds, which make up <u>35% of aviation-</u> related global warming. By using data like satellite images, weather, and flight paths, AI creates maps to predict contrail formation, allowing pilots to <u>cut</u> <u>contrails by 54%.</u>

HotelPlanner's AI agents: revolutionising bookings with a human touch

In 2024, <u>HotelPlanner.com</u>, a leading hotel booking website, has launched AI-powered virtual assistants that have already handled 40,000 inquiries and generated £150,000 in bookings.

The company utilized eight million recorded calls from human staff to develop 20 AI agents capable of engaging in realistic, two-way conversations in 15 languages.

A journalist from The Times tested one of these virtual assistants, named Cassandra, and noted the authenticity of the interaction, including background call center noises.

Remarkably, most customers were unaware they were interacting with AI, believing they were conversing with real people.

Data

Data has, and will continue to be essential in the travel industry — enabling decision-making, planning, marketing, and overall efficiency.

Empowered by advanced data analytics tools, tourism businesses gain valuable insights into individual preferences, behaviours, and travel patterns, allowing for the creation of personalised travel recommendations, including tailored itineraries and suggestions that align with specific interests.

A significant industry trend involves the strategic application of predictive analytics.

Analysing historical and real-time data equips destinations and businesses with foresight to anticipate and respond to evolving travel demand, optimising offerings and enhancing the overall travel experience. Examining predictions using data such as OTA saturation, arrival numbers, sentiment, and destination popularity, has become a matter of when and how, rather than one of it.



The increasing dependence on data-driven insights reflects a transformative shift in the tourism sector's operational landscape.

By harnessing data, businesses not only improve customer satisfaction but also position themselves to adapt and thrive amidst dynamic travel trends.

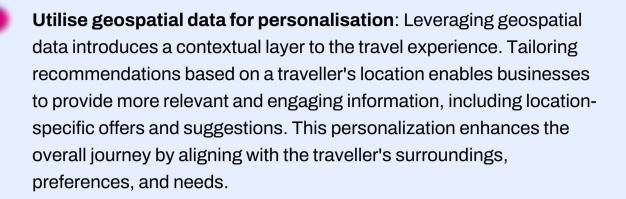
This synergy between data and tourism points towards a future where each traveller's journey is uniquely crafted, shaped by intelligence derived from a wealth of information.



5 practical steps to stay ahead of this trend in 2025

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Employ sentiment analysis to assess perception: Sentiment analysis tools (such as our <u>Sentiment Score</u>, included in our all-in-one destination management platform <u>D/AI Destinations</u>) for customer reviews is crucial in understanding and responding to customer satisfaction, identifying areas for improvement and allowing for proactive responses that enhance the overall experience.



Keep yourself and your staff updated on the latest technology: Technology is constantly under evolution. Make sure both you and your staff are aware of emerging technologies and data management practices to foster adaptability and competitiveness. Ongoing training

programs are essential for keeping staff updated on industry trends and optimising the effective use of technology.

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Adopt AI-powered customer insights: Embracing AI tools for customer insights revolutionises how businesses understand and engage with their customers. Analysing customer behaviour, preferences, and feedback with AI-driven tools allows for tailored marketing strategies and heightened customer engagement. The result is more personalised travel recommendations, creating a seamless and engaging experience for the modern traveller.

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Invest in robust data infrastructure: A solid foundation in data infrastructure is essential for navigating the data-driven landscape of the tourism industry. Developing a comprehensive data infrastructure enables businesses to efficiently collect, store, and manage customer data. Investing in technologies that facilitate real-time data processing allows for quick and informed decision-making, contributing to operational efficiency and strategic adaptability.



03. Next-level personalisation

The travel industry is no longer discussing personalisation as a distant goal it's happening now. As advancements in AI, big data, and customer insights evolve, the emphasis on crafting bespoke travel experiences is reshaping the industry.

Recent data reveals that <u>83% of travellers</u> expect their travel providers to tailor recommendations based on past behaviours and preferences and <u>79% say</u> <u>personalisation influences their purchase decisions</u>. This shift is especially prominent among Gen Z and Millennials, who value seamless, hyper-relevant travel planning over generic offerings.

The blend of data, social media, and AI will undoubtedly ease this transition, turning **personalised travel experiences** into a **feasible and integral part** of the industry's future.

From sustainability initiatives to technological innovations, each development emphasises the necessity to personalise experiences for individual travellers authentically.



Examples of personalisation in action:

- HotelPlanner's AI chatbots: AI-powered virtual assistants, such as HotelPlanner's generative AI chatbots, provide personalised hotel recommendations and bookings. These bots mimic human interaction, offering tailored services based on individual preferences and queries. For instance, they handled 40,000 requests and generated £150,000 in bookings within their first month. (*Source: <u>The Times</u>*)
- Livestreaming by Trip.com: Leveraging livestreaming, Trip.com curates customised travel packages for its audience. These sessions provide interactive, real-time engagement, catering to viewer preferences. Campaigns have driven billions in sales, with sessions tailoring packages to regional and individual demands. (*Source: Phocuswire*)
- **Marriott's real-time itinerary builder:** Marriott's AI tools enable personalised itineraries by analysing traveller preferences. They provide tailored activity suggestions, enhancing the guest experience by delivering plans uniquely suited to individual tastes. (*Source: Marriott Pressarea*)
- Fliggy's custom virtual experiences: Alibaba's Fliggy platform delivers personalised virtual travel campaigns, including destination promotions and unique activities. These interactive sessions regularly generate millions per campaign by tapping into consumer interests. (Source: <u>Phocuswire</u>)



This transformative shift towards AI-driven personalisation is expected to foster a new era of customer-centric travel, where each journey becomes a uniquely crafted and seamlessly personalised adventure, reflecting the individuality of the modern traveller.

As the industry continues to embrace these innovations, we can also anticipate further advancements, such as enhanced augmented reality travel experiences, voice-activated personal travel concierges, and even more sophisticated algorithms that adapt in real-time to changing traveller preferences.

And while AI and other tech advancements are providing the tools while further propelling this need for personalisation, it's hard to ignore the impact social media has had on personalised travel experiences.



Sophisticated algorithms target users **effectively**, **consistently exposing them to content that aligns with their preferences**, **travel behaviours**, **and interests**. As a result, social media has become *the* treasure trove for users to find inspiration and advice from the experiences shared by their peers on these platforms.

Social media also serves as a powerful tool for direct communication between travellers and service providers, creating a channel in which the needs and preferences of the modern traveller can be responded to in real-time.

The influence of social media, coupled with advanced algorithms, has ushered in a new era where travellers not only consume personalised content but actively contribute to the collective pool of insights, shaping the landscape of personalised travel experiences for all.



5 practical steps to stay ahead of this trend in 2025:



Implement dynamic personalisation strategies: Utilise AI algorithms to tailor marketing messages, travel itineraries, and recommendations based on real-time sentiment analysis, ensuring a more responsive and individualised travel experience.

Enhance customer profiles with comprehensive data integration: Integrate diverse data for comprehensive customer profiles. Combine demographics, historical preferences, and real-time sentiments to deliver highly personalised experiences.



Social media engagement: Actively engage with users on social media platforms. Respond to comments, gather feedback, and use these platforms to understand and meet craft offerings tailored to their preferences.

Embrace the courage to try new things: Being different shouldn't be a negative. Innovation often stems from the courage to do things differently, opening up opportunities for growth, learning, and distinctive experiences.



04. Human-centric travel experiences

As technology continues to shape the travel landscape, there is an emerging shift towards experiences that cater to deeper, more personal connections with the world.

Travellers are increasingly seeking human-centric experiences—those that focus on personal growth, cultural immersion, and authentic connections. These experiences are not just about visiting a destination; they're about meaningful engagement that appeals to the heart and mind.

One example of this shift is <u>heritage travel</u>, where travellers seek to trace their ancestral roots. This trend is gaining momentum as people look to understand their family history and heritage by visiting the places where their ancestors lived.



High-profile figures like Taylor Swift, who has expressed interest in visiting the Cilento region in Italy (the ancestral home of her great-grandfather), and Leonardo DiCaprio, who traced his family's origins in Caserta, Italy, exemplify how this growing interest in heritage is shaping travel. **The appeal lies in reconnecting with one's past, offering a deeply personal journey that goes beyond the typical tourist experience.**

In parallel, another human-centric trend gaining traction is the rise of <u>bravecations</u>.

These are bold, adventurous trips that push individuals out of their comfort zones, allowing them to take risks they wouldn't typically entertain at home. **From speaking to strangers and trying unfamiliar cuisines to skydiving or embarking on challenging hikes, these vacations are about embracing the unknown**.

According to a recent Marriott report, many travellers are seeking more audacious experiences while away, underscoring a growing desire to break free from the mundane and take on transformative experiences. The emphasis here is on personal development and the thrill of stepping into new, uncharted territory.

Booking.com also highlights the rise of "<u>noctourism</u>," where travellers are seeking dark-sky destinations, and wellness retreats that encourage deeper personal connections. The demand for these types of experiences underscores a shift towards well-being, with more people seeking to connect with themselves and others in meaningful ways.

These examples reflect the broader shift in the travel industry towards humancentric experiences—those that not only deliver new environments and activities but also foster meaningful, life-changing experiences.

The focus is on deeper emotional connections, whether through rediscovering one's heritage or embracing bold adventures.

As travellers increasingly seek authenticity and personal growth, the demand for experiences that speak to the human spirit is expected to continue to rise.



5 practical steps to stay ahead of this trend in 2025:



Niche marketing and targeted campaigns: Implement niche marketing strategies that target specific traveller interests, emphasising the unique appeal of the destination — such as one catering to adventure enthusiasts, cultural explorers, or eco-conscious travellers, while showcasing the offbeat experiences tailored for each group.



Local influencer collaborations: Partner with local influencers and content creators who have a strong connection to the destination.

Exclusive partnerships with travel platforms: Establish exclusive partnerships with travel platforms or agencies that specialise in promoting off-the-beaten-track destinations.

Interactive digital maps and itineraries: Develop interactive digital maps and itineraries showcasing lesser-known attractions and routes.

Implement capacity management: Ensure you have a comprehensive carrying capacity management strategy to determine the maximum number of visitors a destination can sustain without causing negative impacts on the environment and local communities.



05. Resilience and crisis management

Resilience and crisis management will be crucial to the travel industry in 2025 as the sector continues to face unpredictable challenges, from natural disasters to political unrest.

Over the past year, we've seen a rise in extreme weather events that have impacted travel, from severe droughts in the Mediterranean to devastating floods in various parts of the world towards the end of the year.

The ability of destinations and travel operators to quickly adapt to these disruptions will be a key factor in maintaining stability and confidence in the sector—and in transforming opportunities into success while managing challenges effectively.



In response to this growing need for resilience, destinations will focus on building flexible infrastructures and strategies that enable them to withstand and recover from crises.

This includes diversifying tourism offerings, strengthening local partnerships, and ensuring robust safety measures are in place to protect both travellers and local communities in the face of increasingly frequent environmental disruptions.

Crisis management plans will become more dynamic in 2025, focusing on proactive measures to anticipate and mitigate risks before they escalate.

Data will play a crucial role in this process, offering insights into traveller behaviour, sentiment, and emerging risks.

By understanding these trends, destinations can make informed decisions and implement strategies that support long-term resilience.

Ultimately, the ability to manage crises and maintain business continuity will determine the sector's success in 2025 and beyond.

With the right data, businesses can quickly adapt to shifting consumer preferences, market dynamics, and emerging destinations, ensuring they stay relevant and prepared for whatever comes next.



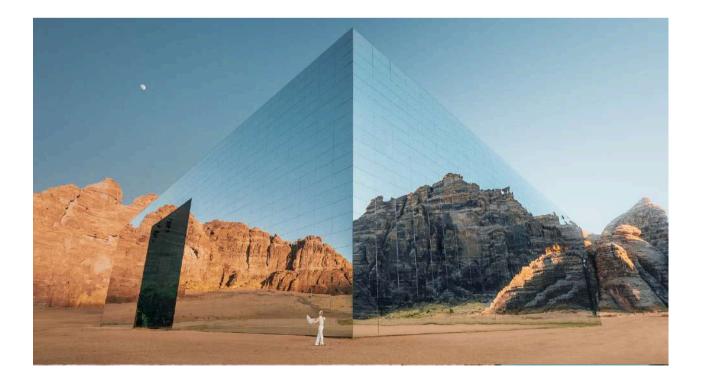
However, resilience isn't just about bouncing back—it's also about staying ahead. In a crowded and ever-changing travel industry, innovation will be a key differentiator.

Whether it's adopting new technologies to enhance customer experiences or creating unique, customisable travel packages, businesses that embrace creativity will not only survive but thrive.

The ability to quickly adapt and act on data-driven insights will allow businesses to shape the future of travel, ensuring they remain relevant and ready for whatever comes next.

As the travel landscape continues to evolve, the industry's success will depend on its ability to manage crises, innovate, and meet the changing needs of a dynamic, global traveller.

That's why we've added **five additional actionable tips to our list below**. These extra strategies are geared toward helping you stay flexible and prepared. With these new options, you'll be better equipped to stay ahead and handle any challenges that come your way.



10 practical steps to stay ahead of this trend in 2025:



Agile Itinerary planning: Embrace agile itinerary planning that accommodates geopolitical shifts and unexpected events. Develop modular travel packages that can be easily adjusted to align with changing circumstances, providing travellers with alternatives and ensuring a seamless experience.

Sustainable and eco-friendly initiatives: Demonstrate flexibility by incorporating sustainable and eco-friendly practices. Offer travel options that minimise environmental impact, such as promoting eco-conscious accommodations, carbon offset programs, and responsible tourism practices, aligning with the growing demand for eco-friendly travel experiences.





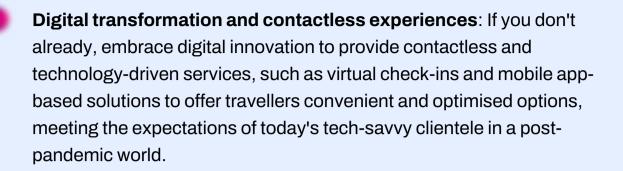
Data-driven personalisation: Leverage data for personalised experiences that adapt to individual preferences. Utilise customer data to customise travel recommendations, from suggesting destinations based on historical preferences to tailoring activities and accommodations in real-time, creating a more personalised and responsive travel journey. **Crisis communication strategies**: Develop flexible crisis communication strategies to address unforeseen challenges. Have protocols in place for transparently communicating with customers during unexpected events, providing timely updates, and offering flexible solutions such as rebooking options or alternative travel arrangements to ensure customer satisfaction.

Innovative marketing campaigns: Be flexible in marketing approaches by embracing innovative campaigns. Utilise social media trends, influencers, and immersive technologies to reach diverse audiences. Implement agile marketing strategies that can quickly adapt to changing consumer behaviours, ensuring relevance and engagement.

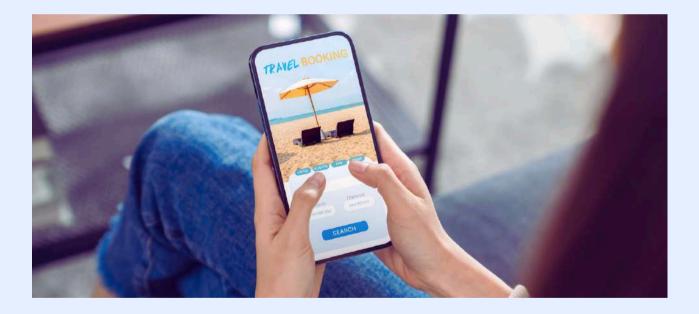


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Collaboration and partnerships: Foster collaborations and partnerships with local businesses and destination authorities. These partnerships provide flexibility in creating unique and diverse experiences for travellers. They also offer resilience in the face of geopolitical changes, as diversified partnerships can mitigate risks associated with dependency on specific regions.



Flexible cancellation and refund policies: In response to global economic challenges, the travel industry now provides installment options like PayPal or Scalapay. Complementing this, flexible cancellation and refund policies address uncertainties, offering travellers convenient options for adjustments. This approach not only fosters trust and loyalty but also recognises the unpredictable nature of travel plans, positioning businesses as empathetic and accommodating.





Employee training and empowerment: Provide ongoing training and support to your staff to equip them with the skills and knowledge needed to adapt to changing circumstances and deliver and maintain exceptional service to customers

Continuous improvement: Continuously gather feedback from customers, analyse performance metrics, and identify areas for improvement. By remaining open to feedback and continuously striving to enhance your offerings, you can stay ahead of the curve and remain competitive in the ever-evolving travel industry.







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Tourism destinations vary in size from neighbourhoods, cities, regions and countries. Each of these territories requires ready-to-use and accurate data and actionable insights about their destination, its visitors and local operators to make effective decisions.

Clear, reliable and always up-to-date data to plan growth strategies, attract the right visitors and gain an unprecedented competitive advantage.

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The Data Appeal Company

The Data Appeal Company SpA (formerly Travel Appeal) was founded in 2014 and acquired in 2022 by Almawave Spa, a company listed on the Euronext Growth Milan market of the Italian Stock Exchange and part of the Almaviva group.

Utilising a proprietary algorithm based on artificial intelligence, machine learning, and semantic analysis, Data Appeal collects, measures, and analyses all publicly posted feedback online.

It merges this feedback with geographical and contextual data, helping businesses across industries leverage insights to guide decisions and gain a competitive edge.

The company's goal is to democratise and simplify the use and comprehension of data, assisting businesses and institutions in making effective and informed decisions.

This, in turn, aims to accelerate progress towards a more sustainable and inclusive world.

Explore our solutions for tourist destinations



