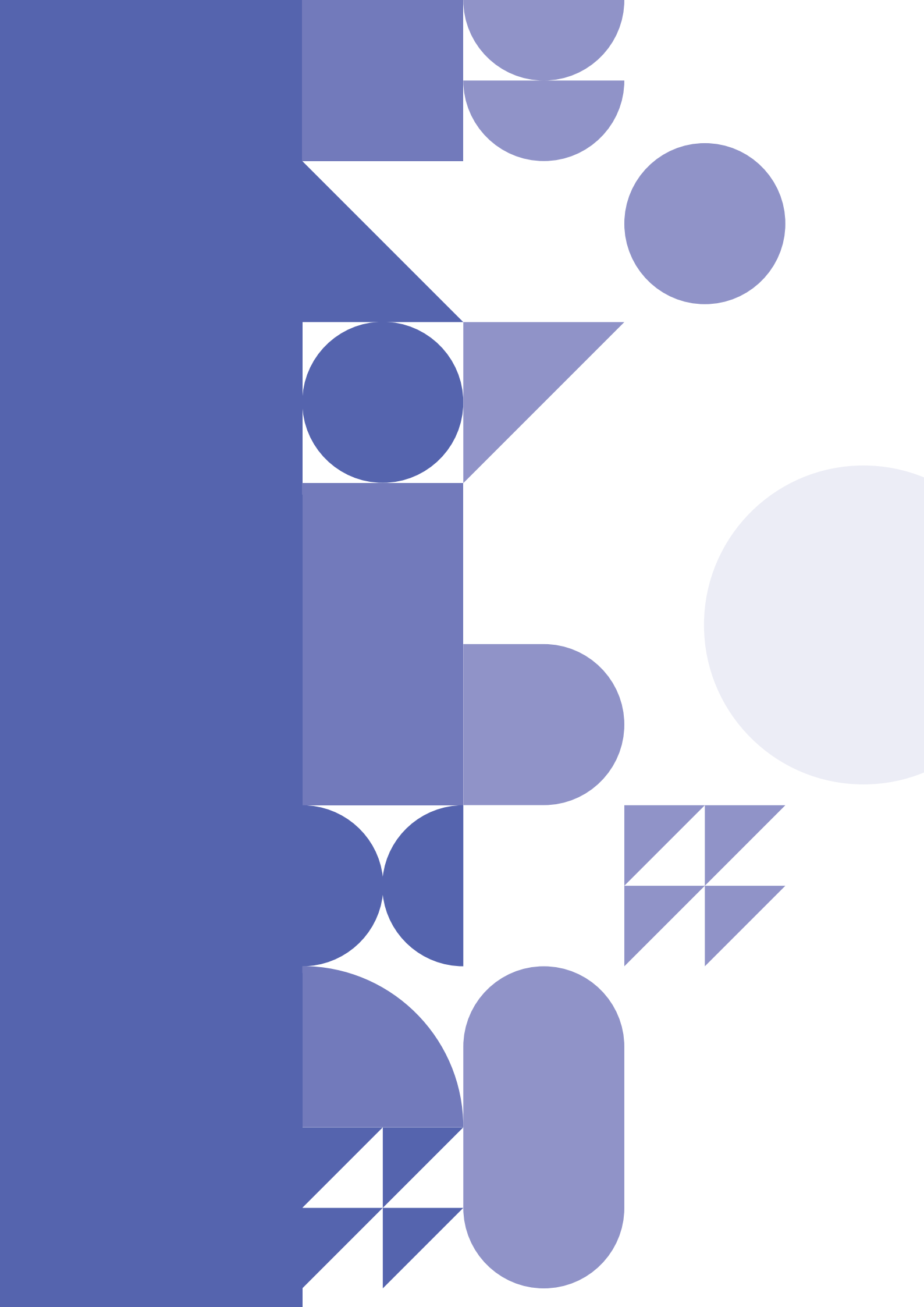**ITB** | 360°

ITB TRAVEL & TOURISM REPORT 2025/2026

Digitalization and Disruption: 20 Insights for the Future Role of Marketing in Tourism

Dear readers,

the report you are about to read takes a deep dive into the ever-evolving dynamics of the tourism industry. Based on three global industry surveys conducted in collaboration with the Ostfalia University of Applied Sciences, it identifies key trends shaping the future of the sector covering most pressing topics of 2025: How is tourism marketing changing? What role do sustainability and digital transformation play? How is artificial intelligence reshaping the industry? Beyond technology aspects, we also examine political and social influences, the challenges they bring, and why crisis management and resilience are more important than ever.

Staying ahead in the tourism industry means being able to adapt. This report offers valuable insights and strategies to help businesses navigate rapid technological advancements, shifting consumer behaviors, and an increasingly competitive market.

Stay tuned for an in-depth analysis of what the future holds for the travel and tourism industry and how you can make use of them to navigate your business through challenges and opportunities in the future.

Deborah Rothe
Director, ITB Berlin

Outlook

Between success and the pressure to adapt

The international tourism industry has found its way back to success after the end of the coronavirus pandemic. At the start of the ITB Berlin Convention 2025, most companies are looking back on a financial year with high booking figures and dynamic growth rates. However, a wide range of tasks and challenges await in 2025. The industry is under increasing pressure to innovate and adapt. Advancing digitalisation, new opportunities, and the uncertainties of AI, as well as changing customer markets and customer habits, require considerable investment in IT infrastructure, marketing, and expertise.

The risk of falling behind

Traditional tour operators, hotels and sales companies, but also numerous destination tourism organisations, have so far been too hesitant to take on these tasks. Many medium-sized companies are currently not sufficiently prepared for the complex challenges. They are at risk of falling behind large platform providers and tech companies in an increasingly competitive environment. The business of the future will be characterised more than ever by the availability of data. Targeted investments in data infrastructure, data analysis and data management are the basic prerequisites for digital visibility, efficient marketing and successful customer communication. The further training and qualification of in-house staff, the increased use of external IT service providers and the use of innovative AI tools can all contribute to improving a company's data expertise.

Traditional boundaries are dissolving

Tourism providers must critically review the competitiveness and resilience of their company. The rules of the market will continue to change in the coming years as a result of digital transformation. New technologies such as AI enable access to more and more travel data and travel components, meaning that tourism services can increasingly be offered outside the traditional tour operator and distribution market. The traditional boundaries between tour operators, booking and comparison portals are dissolving.

Professional data management

Climate change and growing environmental problems in holiday destinations also require decisive responses. The networking and activation of relevant stakeholders in the destinations, the definition of transparent and realistic sustainability goals and the communication of sustainability issues to customers are important building blocks for countering negative developments. Professional data management and the use of new AI tools, for example in the management of visitor flows, can also provide support in this task.

Shortage of skilled labour

Challenges in areas such as sustainability, resilience and data management are being faced by an industry with a shortage of staff, particularly in Europe. The shortage of skilled labour has worsened during the coronavirus crisis. Image-damaging causes such as comparatively low salaries or unattractive working hours are unlikely to change in the short term in the face of margin pressure and increased competition. Demographic change also means that the industry will continue to be confronted with this problem. Innovative working time and remuneration models and positioning as an attractive employer brand remain challenges that require creativity and new concepts.

Content

The transformation in the tourism industry requires the activation of different areas of expertise in organisations and companies. Classic core competencies are required for the fundamental positioning and at the level of human resources management (theses 1.1 to 1.5, 4.1). Measures to strengthen areas such as sustainability and resilience require transformative competencies (theses 2.1 to 2.5, 5.1). Technological skills are needed to manage the digital transformation (theses 3.1 to 3.4). The successful application of artificial intelligence requires key digital skills (theses 6.1 to 6.3).

The tourism industry is in for the long run: our success in dealing with larger planetary challenges is not unrelated to the industry's ability to tackle immediate social, environmental, and economic pressures.

Willy Legrand, Professor
IU International University of Applied Sciences

I believe AI and digitalisation are reshaping competition, booking, and data, demanding smarter company strategies for sustainability, resilience, and the future of work ethics.

Charlotte Lamp Davies, Founder
A Bright Approach

The future of our industry isn't just about adopting new technology – it's about using it to create better experiences, stronger connections, and smarter ways of working.

Lea Jordan, Member
Board of Experts ITB Berlin Convention

AI will redefine the travel experience: seamless, hyper-personalized, and predictive. The future of tourism isn't just digital. It will need a lot of human competence.

Dirk Rogl, Founder
Travel.Commerce.

To thrive in the future, the hospitality industry must embrace cutting-edge tech, innovative business models, and regenerative practices – delivering value not just for business and guests, but for society at large."

Karoline Wiegerink, Professor of City Hospitality
Hotelschool The Hague

1.1 Visibility and brand recognition are the biggest challenges for marketing in 2025

The growing influence of artificial intelligence, but also the increasing power of popular social media platforms such as TikTok, Instagram, and YouTube, have permanently changed the tourism industry and the way we travel.

The role of Social Media platforms
Social media platforms and other internet offerings have become indispensable sources of information for travelers when planning their trips. Holiday bookings are also increasingly being made digitally. This trend will continue and may even accelerate shortly. As a result, traditional marketing concepts are coming under increasing pressure and appear increasingly ineffective. For most tourism service providers, it will be crucial in the future, that their content and offers are pro-

minently displayed on platforms and in search engine rankings. However, it can also be observed that the boundaries and distribution of roles between tour operators, comparison platforms, and booking platforms are becoming increasingly blurred.

New strategies and sales channels
There is much to suggest that the use of artificial intelligence will make it possible to bundle and market tourism offers in a new way in the future, thus creating new sales strategies and sales channels. In this dynamic environment, it will be important for tourism providers to rethink marketing concepts and adapt communication strategies to remain credible under changing conditions. To be discoverable in the future, the brand must be positioned as a guarantor of relevant content.

Biggest marketing challenges in 2025

What are the biggest marketing challenges that your organization will face in 2025?

Challenge	%
Brand visibility and recognition	35,5%
Budget constraints	33,0%
Increased competition	29,0%
Integrating AI in marketing strategies	29,0%
Technology adoption and integration	28,6%
Target audience reach and segmentation	25,7%
Customer retention and loyalty	25,7%
Lack of personnel/ employees	24,6%
Innovations	23,2%
Automating processes through AI	22,8%
Multichannel strategies	21,4%
Market volatility	20,3%
Sustainability requirements and expectations	19,6%
Content creation und storytelling	19,6%
Data management and analytics	19,6%
Building and maintaining consumer trust	18,8%
Changing consumer behaviour through AI	18,5%
Measuring ROI and effectiveness	16,3%
Lack of competences/skills	13,8%
Crisis management	13,0%
Data Privacy and Regulations	12,7%
Hyper-personalization	8,3%
Other	2,9%
Don´t know / no answer	2,5%

Multiresponse
⌀ 4,8 mentions per person

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➜ Travel providers will also have to ensure an appropriate presence in search engine rankings in the future. Investments in SEO (search engine optimization) and the use of proper SEO tools are essential.

➜ Search queries for travel planning not only take place via Google but increasingly also on other channels that reduce Google's market share. The development on platforms such as Amazon or Perplexity, among others, must be observed to be able to show a presence there as well.

➜ AI-generated search and booking processes will require profiling and strengthening your brand beyond SEO positioning in the future.

➜ Customer communication and quality management via rating platforms provide important information for the positioning of your brand on social media platforms.

1.2 Political and social influencing factors mean considerable restrictions for marketing 2025

It is now widely recognized that the world has become more uncertain and more susceptible to crises. For the travel industry, political and social factors now represent a considerable uncertainty factor for the utilization of their marketing budgets and their marketing strategy. Marketing objectives can be thwarted and canceled out by unforeseeable events such as military conflicts and political tensions.

Ineffective marketing budgets
The marketing budgets deployed remain ineffective as a result of sudden events. The tourism industry is often severely affected by such events but can do little to remedy them. There are many examples from the recent past: Western sanctions against Russia as a result of the war in Ukraine led to a collapse of the Russian customer market, while the closure of airspace for civil aviation there led to diversions and higher costs. The

recent Middle East war is also jeopardizing incoming business in the entire region. However, less spectacular developments can also affect marketing decisions: The overutilization of popular tourist regions in the Mediterranean, for example, as a result of rapidly growing demand and worsening ecological and social problems is a crisis phenomenon to which travel companies must respond.

Protests against overtourism
For example, a trend such as blended tourism is leading to higher rents that many locals can no longer afford. Local protests against overtourism and housing shortages in turn damage the image of a destination and make it more difficult to market. The pressure on providers to act therefore manifests itself on different levels.

Biggest marketing constraints in 2025

Where do you see the greatest constraints in marketing?

Constraint	%
Pricing	39,1%
Global crisis	36,1%
Geopolitical tensions	31,8%
Consumer expectations	29,2%
Human resource limitations	24,8%
Data privacy laws	19,3%
Technological barriers	16,8%
Platform policies	16,1%
Advertising and media laws	15,0%
Environmental regulations	12,0%
Access restrictions	11,3%
Don´t know / no answer	5,5%
Other	2,2%

Multiresponse
⌀ 2,5 mentions per person

Source: ITB Travel & Tourism Radar

Future Trends (open text responses)

In your opinion, which trends and developments could have the greatest impact on your company in the next two years?

Trend	%
Political and Economic Conditions	61,5%
(Digital) Marketing and Product Developement	54,0%
Artificial Intelligence and Digitalization	51,3%
Climate and Sustainability	44,9%
Working Conditions and Employees	21,1%
Business Modells and Partnerships	7,2%
Other	23,8% e.g. wellness/health, transportation/mobility, funding

680 open text responses
≘ 2,6 mentions per person

Source: ITB Travel & Tourism Radar

Resilience is the result of three competencies

Intensity of Change

Stabilization	Flexibilization	Change
Expertise for acute crisis management	Competence for gradual adjustments	Competence for comprehensive change
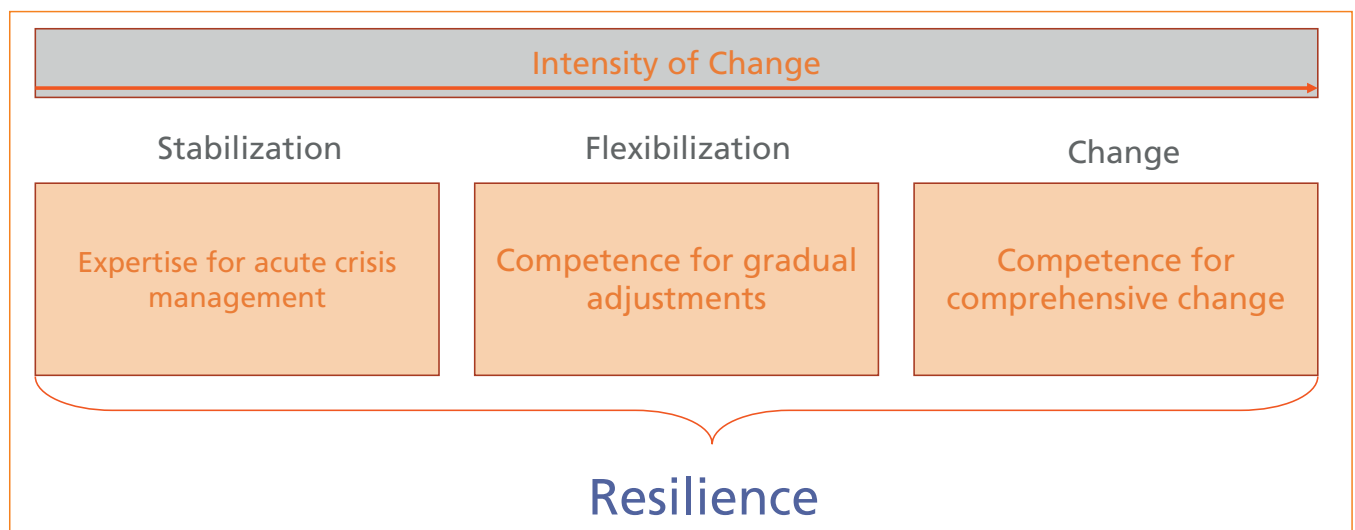
Resilience

Source: dwif 2021 based on Sparkassen-Tourismusbaromter Ostdeutschland. Tourismusnetzwerk Thüringen – Resilienz im Tourismus.
Retrieved on 11-02-2025 from thueringen.tourismusnetzwerk.info/2021/07/13/resilienz-im-tourismus

RECOMMENDATIONS

➜ **Travel providers and destinations should review their portfolio with a view to possible diversification. The offer can be diversified at the level of target groups, products, and regions.**

➜ **The adaptability and responsiveness of brand communication must be increased. Organizations must demonstrate their agility and be able to adapt their marketing messages to the current situation promptly and flexibly (plan - build - run cycle).**

➜ **The political, economic, and social developments relevant to your business model should be closely monitored. By recognizing crises at an early stage, preventive measures can be taken and worst-case scenarios avoided.**

1.3 Tourism organizations act as key players in the transformation of tourism structures

◼ Destination Management Organisations (DMOs) and other public and national tourism organizations (NTOs) play an important role in the transformation and modernization of tourism structures that can hardly be underestimated. The competencies and tasks of these organizations have been changing for years, but there is still room for improvement on many levels.

Climate protection and sustainability
The most important areas of responsibility in this context are climate protection and sustainability, coping with the shortage of skilled workers and labor, the challenges resulting from digitalization, the development of living spaces as well as risk prevention and crisis management. The central task of DMOs and NTOs can therefore be described as that of a transformation agent that facilitates change, brings together and empowers relevant stakeholder groups, and provides content-related impetus. The transformation in the areas of sustainability and digitalization is of critical importance.

The need for clearly defined objectives
The organizations no longer focus exclusively on the needs of tourists but also develop ideas and concepts to protect or improve services of general interest and living spaces for the local population. The participation of the local population in these processes is central. The organizations no longer act exclusively as marketers of a tourist region, but rather as "enablers" that initiate and coordinate communication, opinion-forming, and decision-making processes. Expertise in the areas of network, interface, and management coordination is necessary to manage tasks such as data management or visitor guidance, but also to gain the trust of stakeholders through clearly defined objectives.

Selected marketing challenges by market segment

Challenge: *"Increased competition"*

Market segment	Percentage
Tourism Organisations / Associations - DACH	100,0%
Tour Operators	41,7%
Tourism Organisations / Associations - International	33,3%
Accommodation	32,3%
Travel Agencies	30,0%
Travel Technology	26,7%
Other <5% (specific tourism topics, services, technology)	25,4%
Media and Publishing	16,7%
Information and Consulting	15,0%

Summarized agreement (top 2 box: 1 = "strongly agree" + 2 = "agree") on a scale from 1 = "strongly agree" to 6 = "strongly disagree"

Source: ITB Travel & Tourism Radar

Evolution of destination management
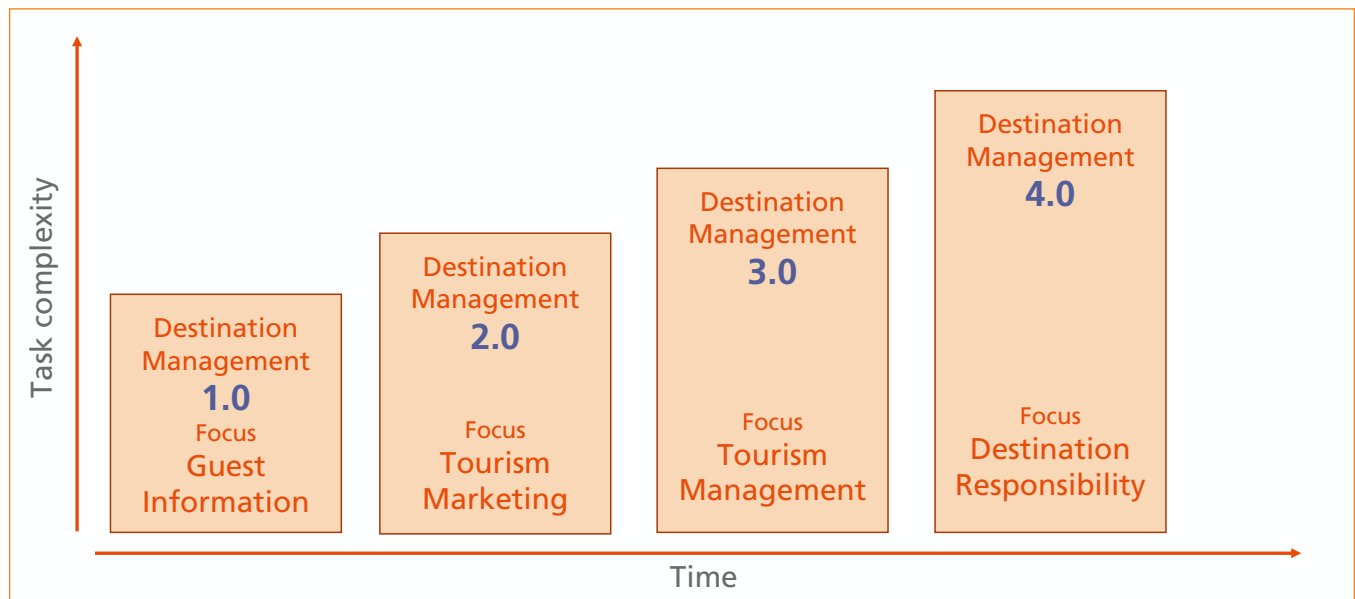
Source: dwif 2023, based on Bieger & Klumbies 2022. Vom Lebensraum-Management zur Destinations-Verantwortung.
Retrieved on 11-02-2025 from www.dwif.de/news/item/lebensraum-management-tourismus-destinationsverantwortung.html

Range of tasks of the DMO 2023

Networking	Interface function	Enabler function
Coordination function	Management coordination function	Creation of trust
Creation of clear visions and objectives	Support of the system heads	Visitor guidance, information, recommendations
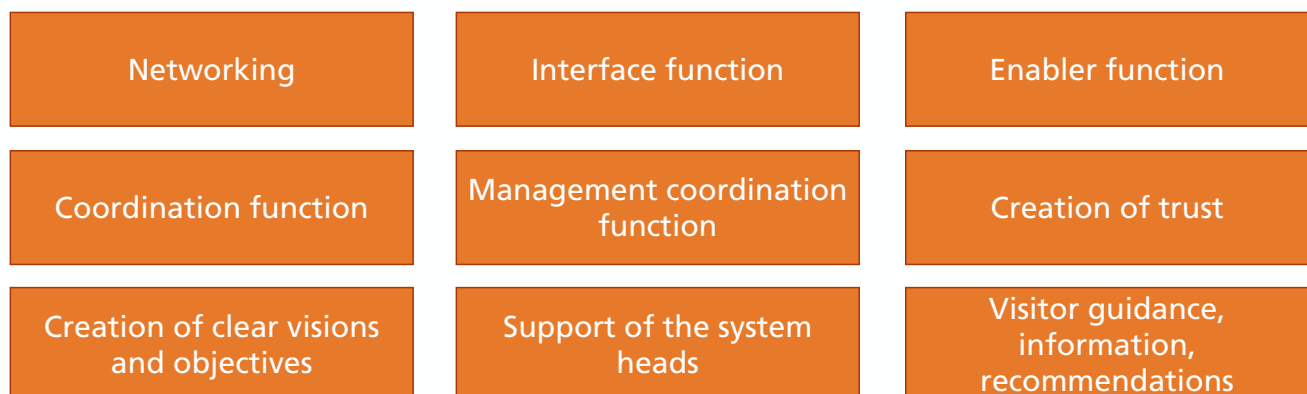
Source: Federal Competence Center for Tourism, Building Blocks of the Future 2019

RECOMMENDATIONS

→ DMOs must also position themselves outside of tourism and seek dialogue with other local groups (residents, retailers, etc.).

→ The technological systems need to be integrated to create an overall experience that includes both analog and digital components and enables the exchange of data and knowledge between the various stakeholders.

→ DMOs work like relationship brokers to network and mobilize stakeholders. This includes new models of cooperation, promotion of innovation, support with financing as well as funding and distribution of resources.

1.4 The transformation requires new business models in tourism

Digital transformation poses new challenges that not only affect a company's business model but also bring about changes in society. Digitalization has given rise to new customer groups and customer requirements for which innovative products and services can be developed.

Communication channels are changing
Phenomena such as resonance tourism as a counter-trend to a working world that is increasingly perceived as abstract (personal encounters, authentic experiences that have a long-lasting effect) or bleisure travel (extension of business trips), but also differentiating attitudes towards sustainability issues that range from high acceptance to complete rejection, require flexible responses and a detailed analysis of the customer market. The channels through which these topics are communicated are also changing. In addition to traditional Google search engine research, services such as YouTube, Instagram, and AI are becoming significantly more important in the inspiration and planning phase.

Access to more travel data
At the same time, digital transformation is enabling access to more and more travel data and travel modules, meaning that more and more services are being offered outside the traditional tour operator market. The former boundaries between tour operators, booking, and comparison portals are becoming increasingly blurred. Transformation pressure also arises from changing environmental conditions. Companies and destinations are sometimes in conflict, as hotels in destinations, for example, are more interested in a short-term return on their investment, while DMOs have to promote the long-term preservation of the destination.

Agreement to statements on specific marketing knowledge

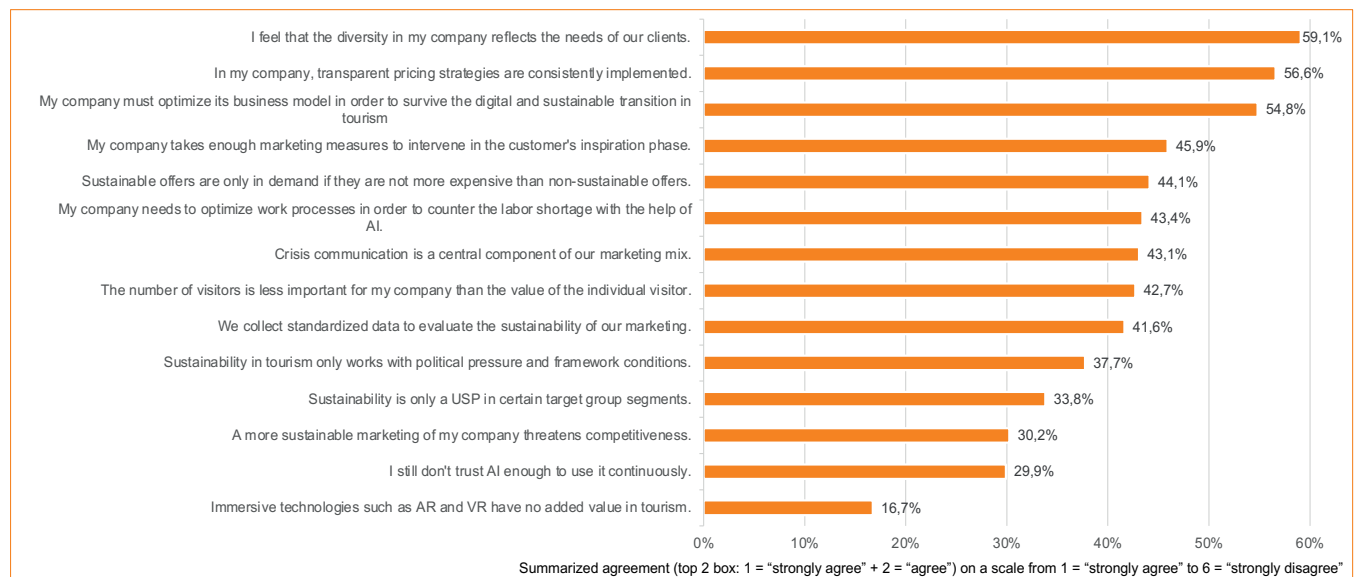| Statement	Agreement
I feel that the diversity in my company reflects the needs of our clients.	59,1%
In my company, transparent pricing strategies are consistently implemented.	56,6%
My company must optimize its business model in order to survive the digital and sustainable transition in tourism	54,8%
My company takes enough marketing measures to intervene in the customer's inspiration phase.	45,9%
Sustainable offers are only in demand if they are not more expensive than non-sustainable offers.	44,1%
My company needs to optimize work processes in order to counter the labor shortage with the help of AI.	43,4%
Crisis communication is a central component of our marketing mix.	43,1%
The number of visitors is less important for my company than the value of the individual visitor.	42,7%
We collect standardized data to evaluate the sustainability of our marketing.	41,6%
Sustainability in tourism only works with political pressure and framework conditions.	37,7%
Sustainability is only a USP in certain target group segments.	33,8%
A more sustainable marketing of my company threatens competitiveness.	30,2%
I still don't trust AI enough to use it continuously.	29,9%
Immersive technologies such as AR and VR have no added value in tourism.	16,7%

Summarized agreement (top 2 box: 1 = "strongly agree" + 2 = "agree") on a scale from 1 = "strongly agree" to 6 = "strongly disagree"

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ **The technological transformation requires agility and flexibility. Changes in the customer market and new booking structures demand decisive responses.**

➔ **A diversification of supply increases control capacities and reduces dependencies.**

➔ **Existing partnerships with event organizers and distributors must be reviewed and, if necessary, reassessed.**

➔ **The marketing of sustainability issues must be differentiated and take into account the preferences of the respective customer groups.**

1.5 Value creation in tourism is shifting from travel to travel preparation

Online platforms, booking portals, and review sites now play a crucial role in travel planning and preparation. Digitalization has fundamentally changed how trips are planned and booked. The orientation and planning phase in the run-up to a trip has become significantly longer as a result. Consumers are spending more time gathering information and researching online.
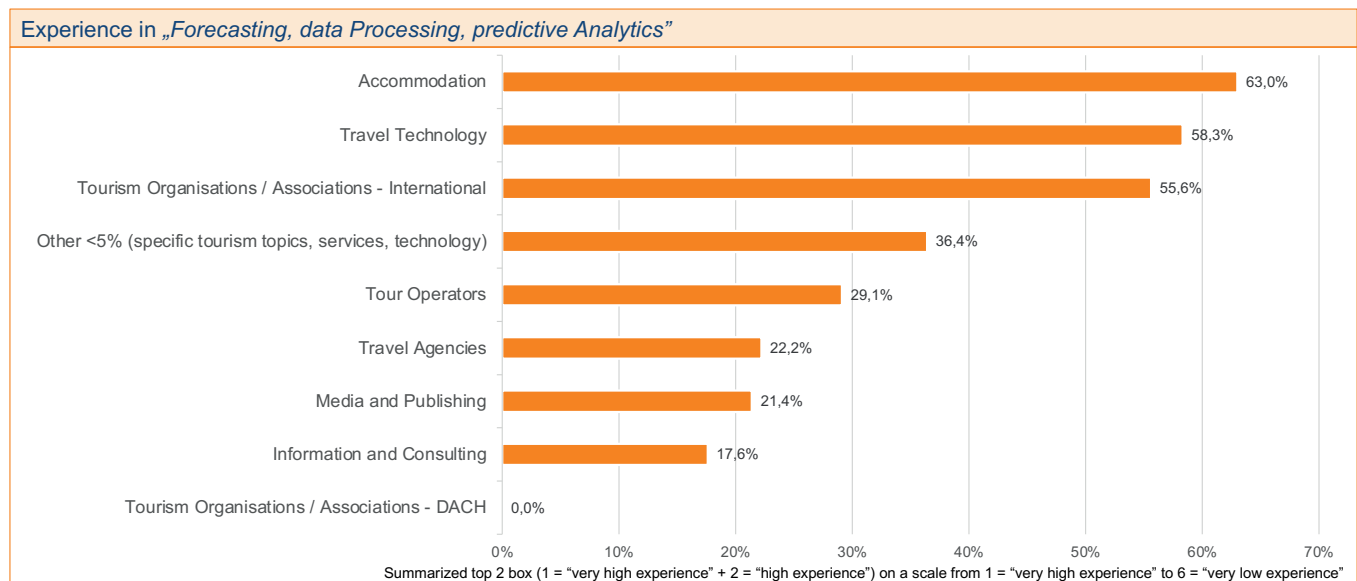
Rapid developments of platforms
The rapid development of platforms (social media) and technologies (ChatGPT, Perplexity & Co) and the subsequent shopping functionalities are dynamically reinforcing this trend. As a result, a significant part of the added value is generated before the actual trip, for example through commissions for online bookings or advertising measures. In its report on the value chain

in tourism, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) emphasizes that actively shaping this chain in partner destinations is crucial. The more money tourists spend and the more of it stays in the region, the greater the regional added value.

Flexible booking conditions
The more certain the player wants to place the right booking channel, the earlier and more strongly it must be placed in the inspiration phase. The urgency of this task is also demonstrated by the experience gained during the coronavirus crisis: the pandemic led to customers booking at shorter notice and more flexible booking conditions for providers. One-off customer acquisition is no longer enough. The customer must also be wooed after the booking.

Selected experiences in digitalization measures by market segment

Experience in „Forecasting, data Processing, predictive Analytics"

Market segment	Percentage
Accommodation	63,0%
Travel Technology	58,3%
Tourism Organisations / Associations - International	55,6%
Other <5% (specific tourism topics, services, technology)	36,4%
Tour Operators	29,1%
Travel Agencies	22,2%
Media and Publishing	21,4%
Information and Consulting	17,6%
Tourism Organisations / Associations - DACH	0,0%

Summarized top 2 box (1 = "very high experience" + 2 = "high experience") on a scale from 1 = "very high experience" to 6 = "very low experience"

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

→ A digital presence through targeted online marketing, SEO, and social media is required to be present as early as the inspiration phase.

→ Acquisition costs can be optimized by diversifying booking channels and using platforms with shopping functionalities.

→ Customer loyalty programs and value-added offers (e.g. exclusive content, flexible booking conditions) help to retain customers in the long term, even after they have made a booking.

→ The adaptation to the changed booking behavior through new cancellation options and short-term booking options leads to more flexibility.

→ Intensive cooperation with the destinations helps to increase reach, generate added value, and convey strong marketing messages.

2.1 The topic of sustainability has not yet arrived in all marketing departments

The topic of sustainability has been the subject of intense debate within the tourism industry for many years. However, despite numerous innovations and standards, it still plays a subordinate role in travelers' booking decisions. The reasons for this also lie in marketing. In addition to the great importance of destination and price when booking a holiday, it is above all the lack of visibility of sustainability aspects in travel offers that leads to the topic having little influence on the booking decision.

Introduction of sustainability standards
The introduction of sustainability standards, certificates, and seals has hardly changed anything in this respect to date. This is because many of these labels and standards are often still unknown to consumers. In addition, they are often not very visible in the marke-

ting of tourism companies. They do not even appear on many portals and platforms. In the digital communication of many small and medium-sized enterprises, the topic of sustainability often has to take a back seat to offer and pricing.

Unique selling points and competitive advantages
The majority of respondents in the survey stated that sustainability is taken into account in their communication on a selective basis, but is not a key driver in marketing. However, it can hardly be deduced from this finding that the topic of sustainability is unsuitable for communication and should therefore be neglected. This is because targeted marketing of the topic can generate important unique selling points and competitive advantages.

Role of sustainability in marketing strategies

What role does sustainability play in your marketing strategy?

Sustainability is integrated into some campaigns or messaging, but its not a primary driver	31,8%
Sustainability is a central theme in our marketing strategy and actively shapes our campaigns	30,7%
Sustainability is at the heart of our corporate strategy and drives all aspects of our actions	15,1%
Sustainability is not yet integrated, but it is a focus area for development	13,0%
Sustainability is not a part of our marketing strategy	9,4%

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ **Determining the preferences of your target groups using a survey provides information about the actual importance of the topic and provides indications for a reorientation of your marketing strategy.**

➔ **With a dedicated visibility campaign as well as behavioral tips and recommendations for guests, the topic of sustainability can be brought to the fore.**

➔ **The sensitization and qualification of our staff promotes motivation and leads them to identify with sustainability measures.**

➔ **Communication on the topic of sustainability should be transparent, honest, comprehensible, and continuous.**

Motivation to engage with the green transformation of tourism

"Intrinsic Motivated"	• Best practices with a very high degree of initiative • In companies: Innovation in the fields of action for decades and across generations • In destinations: Willingness to transform the business model for the future
"Followers"	• Respond to political pressure to act • Often act on the basis of guest demand • High sensitivity to diminishing effects on the annual result • Wish for subsidies
"Hopeless"	• Frustration due to the complexity and multitude of challenges • Disappointed by the political inertia in dealing with the issue
"Denier"	• Refuse transformative action and deny the necessities • Hypothetical category that was not directly examined in the study, but was derived from the interviews and the discourse

Source: Federal Ministry for Economic Affairs and Climate Action, Competence center for green tourism transformation

Fields of action for the green transformation of tourism
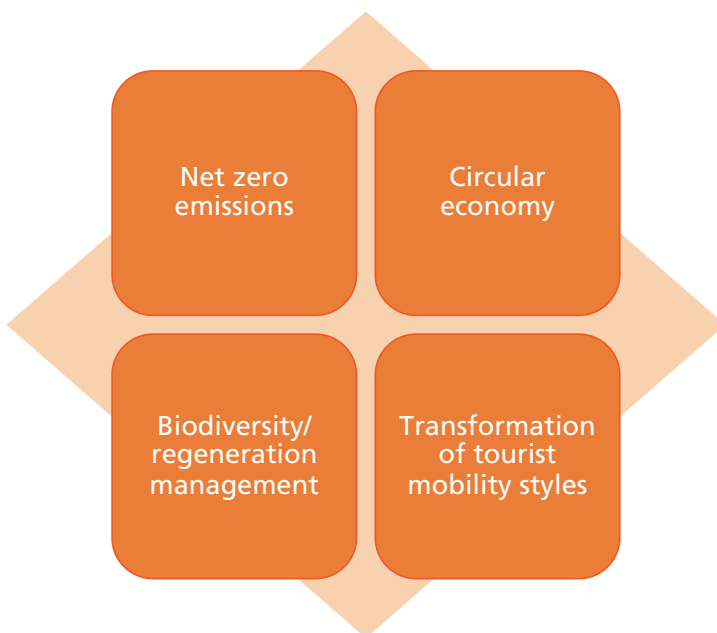
- Net zero emissions
- Circular economy
- Biodiversity/ regeneration management
- Transformation of tourist mobility styles

Source: Federal Ministry for Economic Affairs and Climate Action, Competence center for green tourism transformation

2.2 Sustainability is supply-driven. It is not the travelers, but the providers who must set an example.

The booking behavior of many travelers reveals a clear contradiction between their expectations and reality. Scientists refer to this as an "attitude-behaviour gap". Although awareness of the need for sustainability measures appears to be growing among many travelers, this awareness is only reflected to a limited extent in reality.
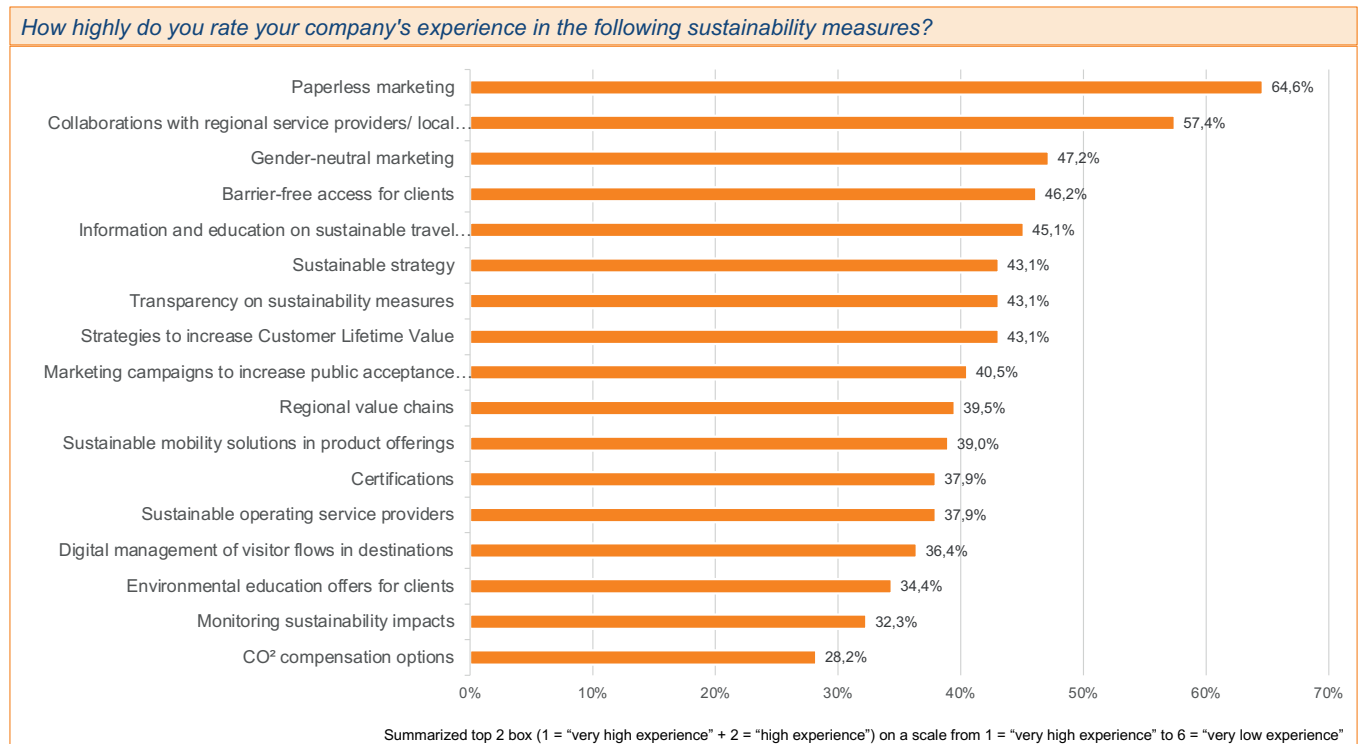
Sustainability criteria are not decisive
Recent developments also show that sustainability criteria are only rarely a decisive factor when booking a holiday. Studies show that this only accounts for a single-digit percentage. The attractiveness of the destination and the price remain far more important for the decision. Developments since the end of the COVID-19 pandemic have once again confirmed this

behavior: Although the issue of sustainability remains on the tourism agenda, the total number of kilometers traveled by air is steadily increasing again and is now at a record level. To fulfill the diverse expectations and demands on the topic of sustainability, it, therefore, remains an important task for tourism providers to step up their activities and launch new initiatives.

Cost-effective options
This is not just about creating sustainable concepts and integrating them into the tourism product, but also about visualizing these services as part of their marketing strategy. The possibilities within this field of activity are manifold. In addition to capital-intensive solutions, many options can be implemented cost-effectively.

Experience in sustainability measures

How highly do you rate your company's experience in the following sustainability measures?

Measure	%
Paperless marketing	64,6%
Collaborations with regional service providers/ local…	57,4%
Gender-neutral marketing	47,2%
Barrier-free access for clients	46,2%
Information and education on sustainable travel…	45,1%
Sustainable strategy	43,1%
Transparency on sustainability measures	43,1%
Strategies to increase Customer Lifetime Value	43,1%
Marketing campaigns to increase public acceptance…	40,5%
Regional value chains	39,5%
Sustainable mobility solutions in product offerings	39,0%
Certifications	37,9%
Sustainable operating service providers	37,9%
Digital management of visitor flows in destinations	36,4%
Environmental education offers for clients	34,4%
Monitoring sustainability impacts	32,3%
CO² compensation options	28,2%

Summarized top 2 box (1 = "very high experience" + 2 = "high experience") on a scale from 1 = "very high experience" to 6 = "very low experience"

Source: ITB Travel & Tourism Radar

Attitude Behaviour Gap
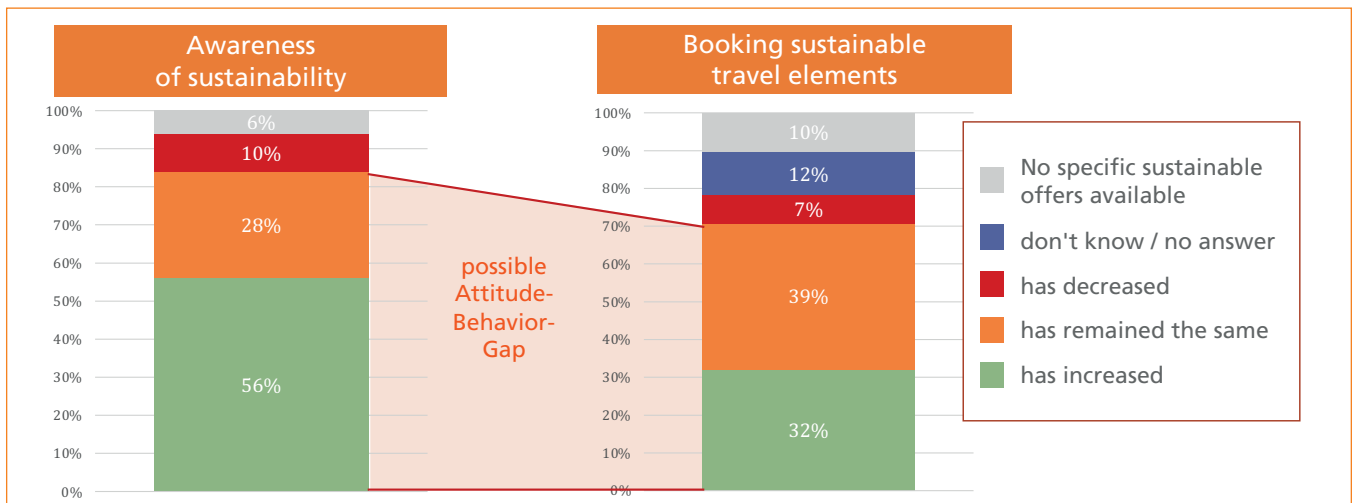
Awareness of sustainability

- No specific sustainable offers available: 6%
- has decreased: 10%
- has remained the same: 28%
- has increased: 56%

Booking sustainable travel elements

- No specific sustainable offers available: 10%
- don't know / no answer: 12%
- has decreased: 7%
- has remained the same: 39%
- has increased: 32%

possible Attitude-Behavior-Gap

Legend:
- No specific sustainable offers available
- don't know / no answer
- has decreased
- has remained the same
- has increased

Source: Federal Ministry for Economic Affairs and Climate Action, Competence center for green tourism transformation

Do you think a significantly higher tax on airline tickets and thus an increase in prices as a climate protection measure is a good thing or a bad thing?

- good: 71%
- bad: 26%
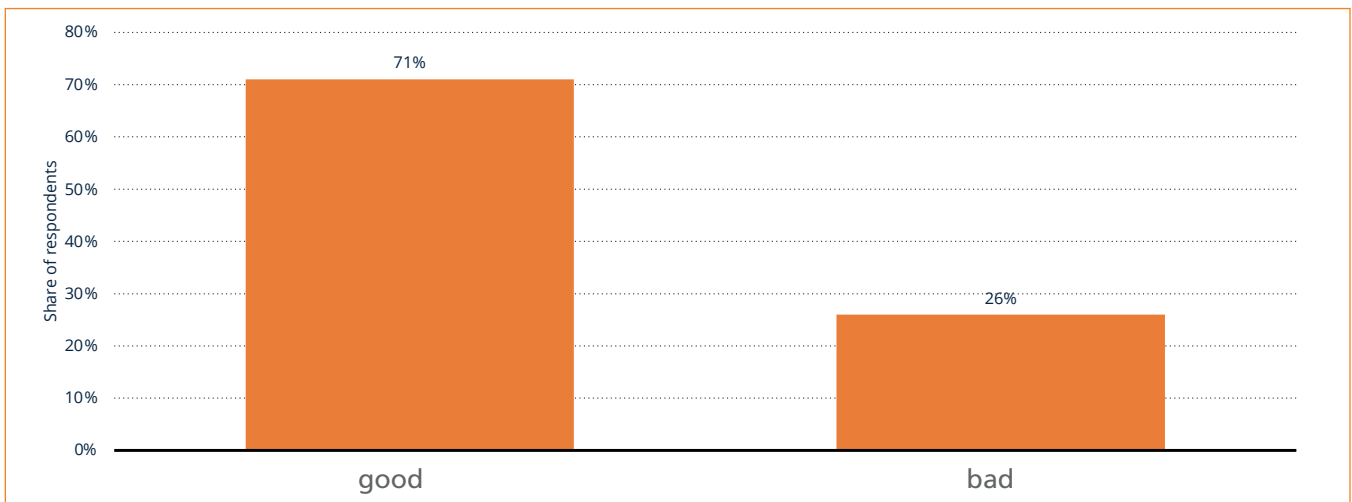
Source: ZDF Politbarometer 2019. Finden Sie eine deutlich höhere Steuer auf Flugtickets und somit eine Erhöhung der Preise als Klimaschutzmaßnahme eher gut oder eher nicht gut?

RECOMMENDATIONS

➔ Waste and resource management, ecological construction, the use of heat pumps, photovoltaics, electromobility, renewable energies, and investments in building and thermal insulation make important contributions to energy efficiency and resource conservation.

➔ Digital solutions for regulating and controlling visitor flows and, in extreme cases, banning undesirable tourist activities protect local structures.

➔ The creation of new attractions in less frequented areas and the increased marketing of offers in the off-season lead to time equalization and protect destinations from overuse and over-tourism.

➔ Industry-specific programs such as the DEHOGA energy campaigns provide orientation and support in developing your strategy.

2.3 The sustainability of one's organization is often overestimated

■ When discussing the topic of sustainability, parts of the tourism industry have a distorted perception. Most organizations consider themselves to be at a higher level than the rest of the industry when it comes to developing and implementing their own sustainability goals.

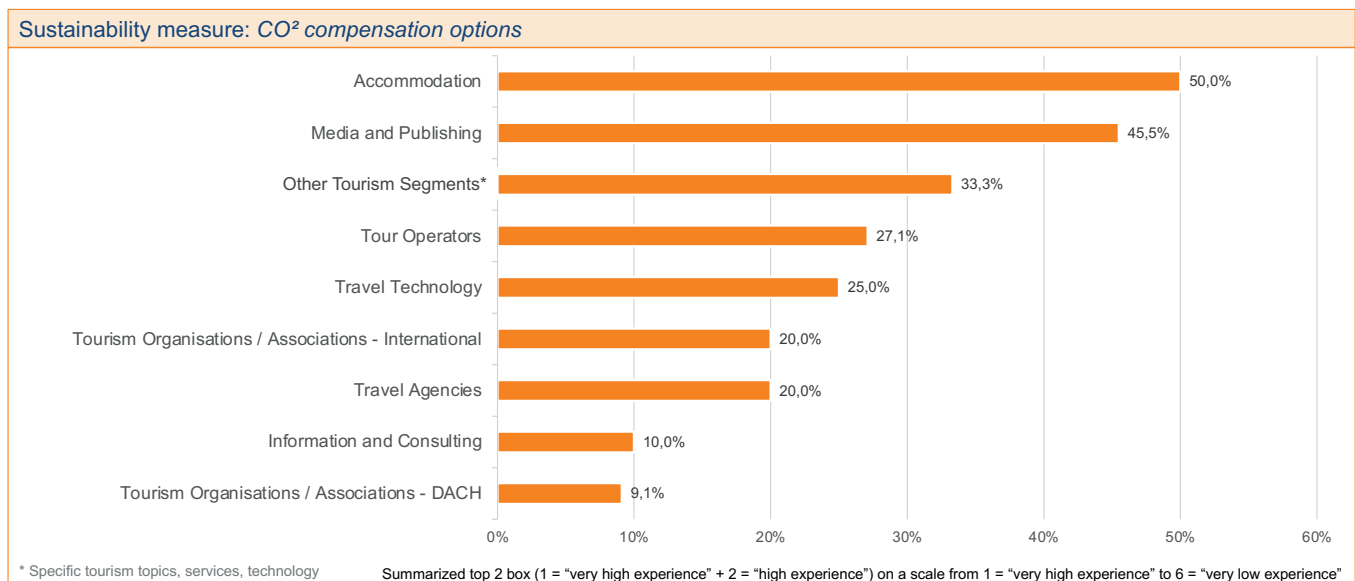**Central goals have not yet been realized**

Many organizations consider their standards to be significantly better than the average level of development in the industry. However, a closer look reveals that central sustainability strategies and goals have not yet been realized in these companies either. Only eleven percent of companies have successfully implemented measures from their sustainability strategy. The reason for this distorted perception is the fact that there is

still a lack of a standardized understanding of sustainability. What constitutes sustainability, how it can be implemented, and how it can be measured remains the subject of very subjective perceptions and judgments.

The need for comparable standards

While one player develops and implements extensive measures for climate protection, waste and resource utilization, energy generation, working conditions, and social projects, another considers and communicates itself to be particularly sustainable simply because the steaks come from the local butcher. To make progress, comparable standards are needed based on which a uniform understanding can be achieved within the industry.

Selected experiences in sustainability measures by market segment

Sustainability measure: *CO² compensation options*

Market Segment	Percentage
Accommodation	50,0%
Media and Publishing	45,5%
Other Tourism Segments*	33,3%
Tour Operators	27,1%
Travel Technology	25,0%
Tourism Organisations / Associations - International	20,0%
Travel Agencies	20,0%
Information and Consulting	10,0%
Tourism Organisations / Associations - DACH	9,1%

* Specific tourism topics, services, technology

Summarized top 2 box (1 = "very high experience" + 2 = "high experience") on a scale from 1 = "very high experience" to 6 = "very low experience"

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ Sustainability and decarbonization targets should be clearly defined. The creation of a roadmap for the implementation and control of the targets can structure the process.

➔ When creating a transformation concept, the current status, long-term goals, action plan, and savings concept should be clearly defined.

➔ Interactive tools such as the „Green Transformation Canvas" or the DEHOGA environmental check provide simple and understandable support for companies on their way to climate neutrality.

➔ At the destination level, there is a need to network the stakeholders to develop a common concept of sustainability.

Self-perception and external perception: The own organization is often rated as more sustainable than the tourism industry

Assessment "State of sustainability"

	5 =very high	4	3	2	1 =very low	=don´t know/ no answer
Industry	1%	6%	35%	47%	10%	1%
Company	8%	29%	40%	17%	4%	2%
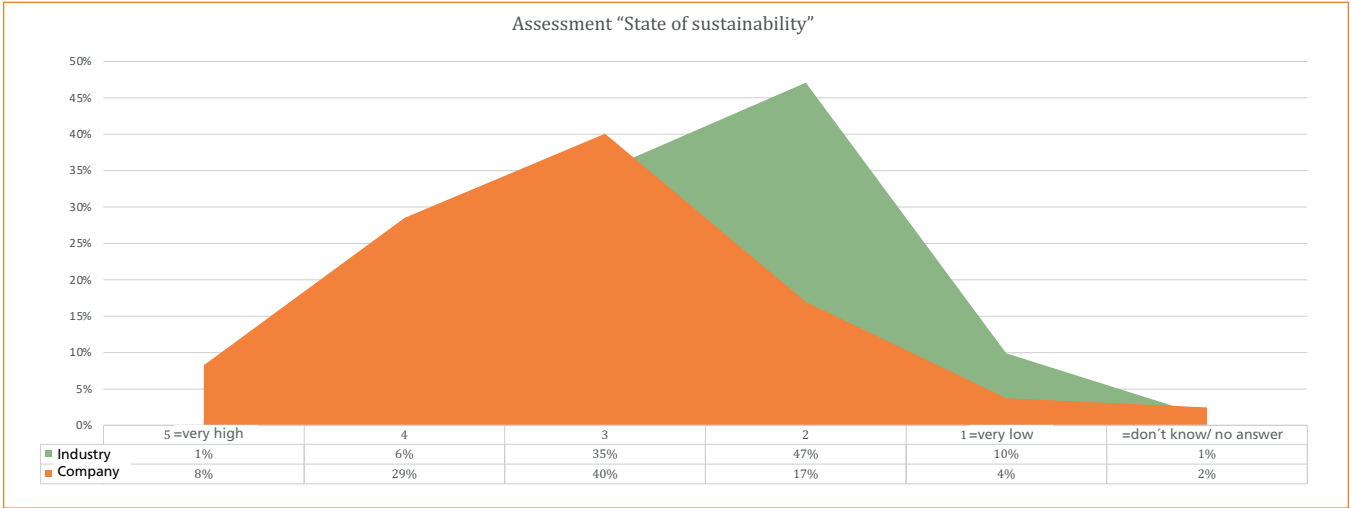
Source: Federal Competence Center for Tourism, Online Panel 1/22 "Climate Protection"

Only 11% of companies were able to successfully implement measures from their sustainability strategy

What level of maturity does your company have in terms of sustainability? (none of the options mentioned: 5%)

		Industry	Services	Trade
Target formulation	CO_2 balance recorded and controlled	95%	94%	90%
	Decarbonization targets formulated	82%	77%	80%
Roadmapping	CO_2 roadmap defined	71%	77%	70%
	Roadmap/targets anchored in organization, being implemented	42%	43%	20%
Realization	First projects being implemented	21%	28%	20%
	Significant CO_2 savings already implemented	8%	13%	20%

Source: Horváth 2023. Status quo der Nachhaltigkeitstransformation – Nachhaltig gegen alle Widerstände.
Retrieved on 11-02-2025 from www.horvath-partners.com/de/media-center/studien/status-quo-der-nachhaltigkeitstransformation

2.4 Sustainability is only an additional selling point in certain target group segments

When analyzing their target groups, many destinations and tourism businesses rely on socio-demographic factors, catchment areas, and income levels. Other target group models such as Sinus-Milieus are often used to take into account the specific travel motives and needs of potential guests. However, here too, the focus is often primarily on the volume of the respective target groups.
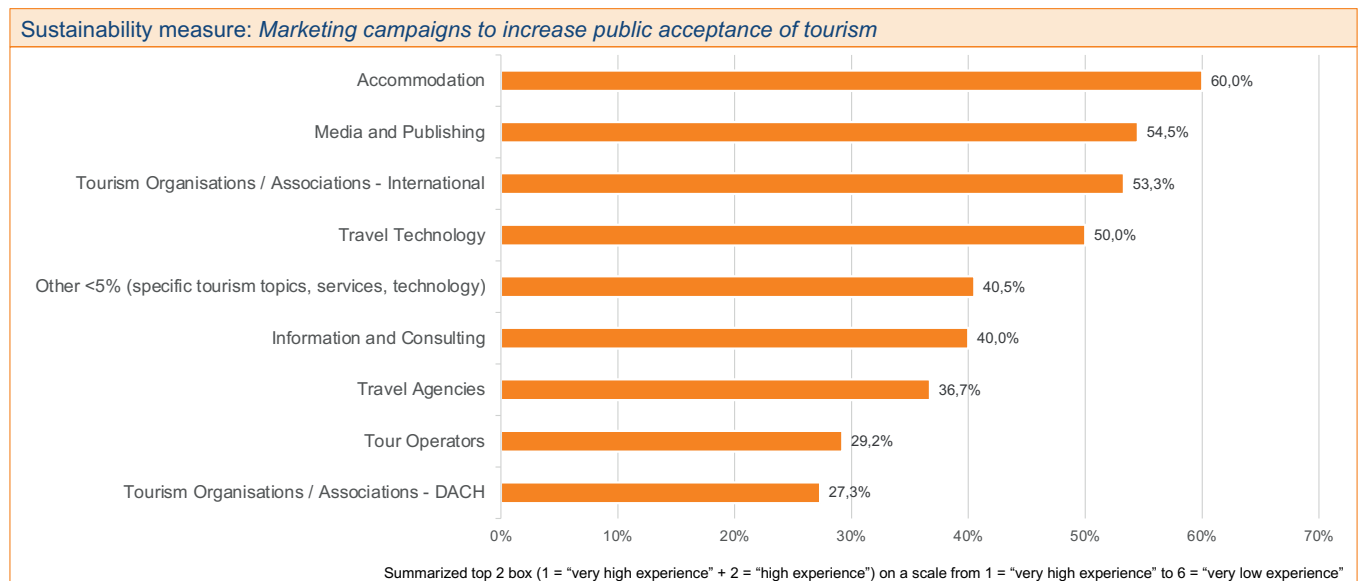
Central sales arguments
However, the target groups identified and addressed on this basis are often not those that can be reached with the central sales argument of sustainability. Based on the Sinus-Milieus, in many cases, the "adaptive-pragmatic" or the "nostalgic-bourgeois" milieu is placed at the center of destination marketing. These

milieus represent the center of society and stand for a large proportion of the overall population. For many target groups in the center of society, however, sustainability aspects are only of secondary importance when booking a holiday or they are not relevant at all. Communicating sustainability as a unique selling point could even have a deterrent effect on these milieus, as they have other preferences. In many cases, the marketing strategy for sustainability topics must therefore be adjusted more precisely.

Post-material and neo-ecological milieus
For example, an attempt can be made to take a closer look at post-material and neo-ecological milieus to develop targeted marketing strategies for these groups.

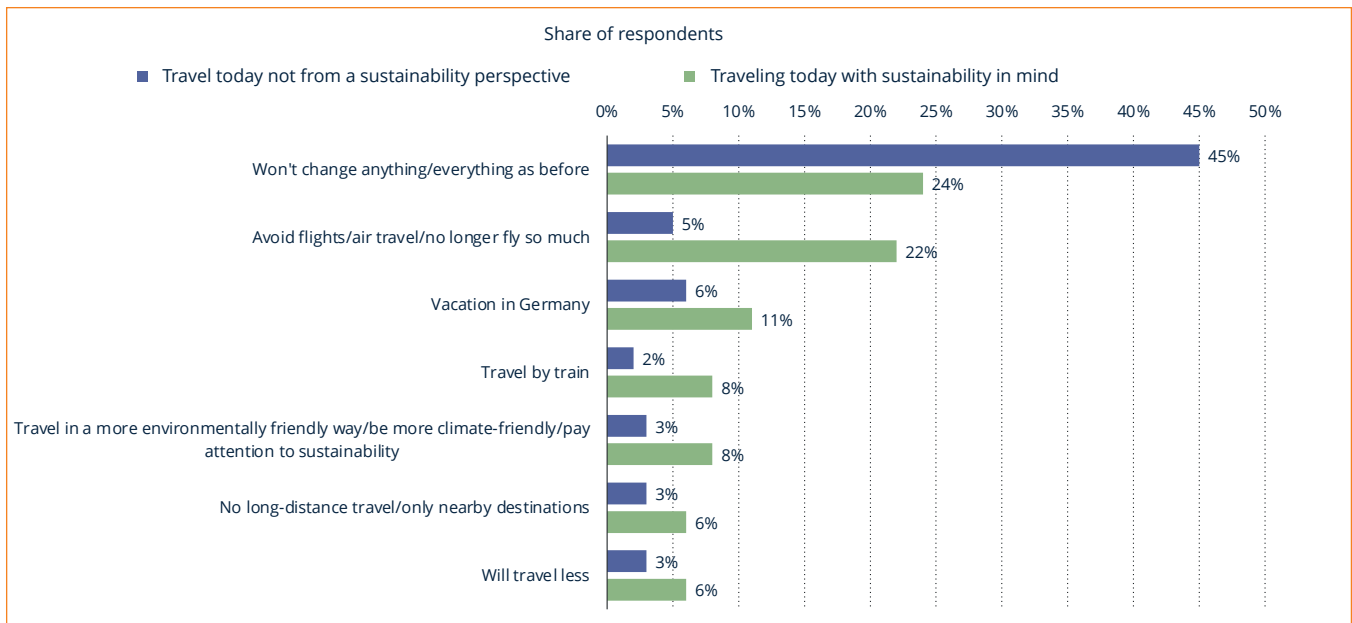## Selected experiences in sustainability measures by market segment

Sustainability measure: *Marketing campaigns to increase public acceptance of tourism*

Segment	Value
Accommodation	60,0%
Media and Publishing	54,5%
Tourism Organisations / Associations - International	53,3%
Travel Technology	50,0%
Other <5% (specific tourism topics, services, technology)	40,5%
Information and Consulting	40,0%
Travel Agencies	36,7%
Tour Operators	29,2%
Tourism Organisations / Associations - DACH	27,3%

Summarized top 2 box (1 = "very high experience" + 2 = "high experience") on a scale from 1 = "very high experience" to 6 = "very low experience"

Source: : ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ **The maturity level of your organization in terms of sustainability must be precisely identified. The importance of sustainable travel needs to be considered more closely when analyzing target groups.**

➔ **It must be very clearly weighed up how centrally sustainability is communicated and which type of communication suits which target group or for which target groups the company's marketing budget is used.**

➔ **Sustainability must be communicated as a central marketing message when addressing target groups.**
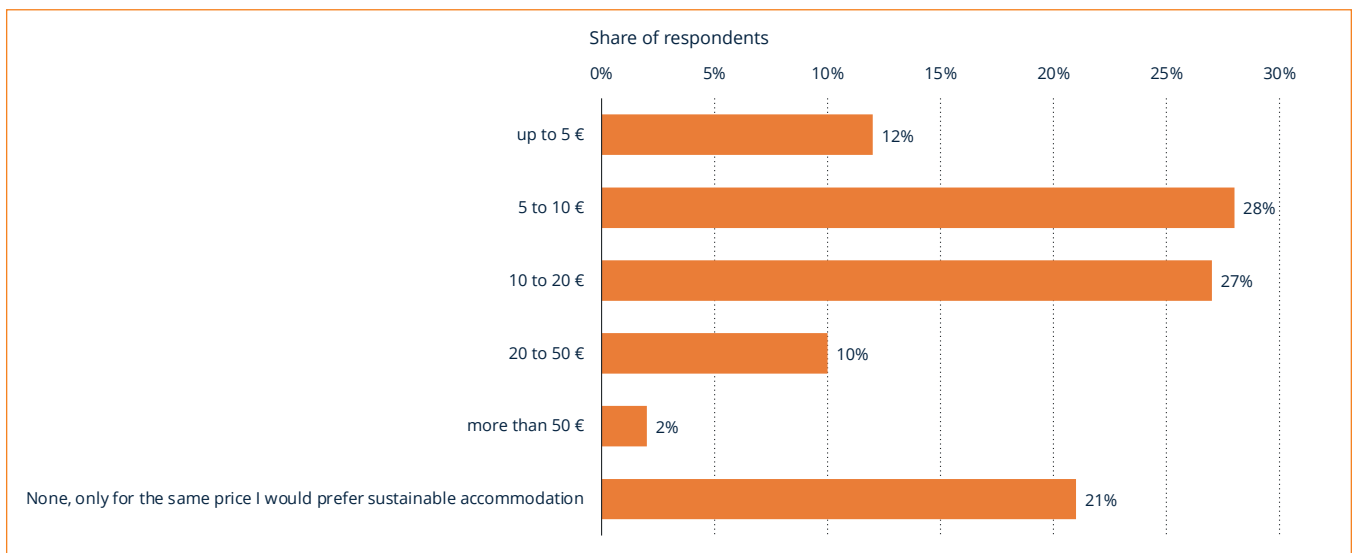
What will you personally change about your travel behavior in the future?

Share of respondents

- ■ Travel today not from a sustainability perspective
- ■ Traveling today with sustainability in mind

Category	Not from a sustainability perspective	With sustainability in mind
Won't change anything/everything as before	45%	24%
Avoid flights/air travel/no longer fly so much	5%	22%
Vacation in Germany	6%	11%
Travel by train	2%	8%
Travel in a more environmentally friendly way/be more climate-friendly/pay attention to sustainability	3%	8%
No long-distance travel/only nearby destinations	3%	6%
Will travel less	3%	6%

Source: Bayerisches Zentrum für Tourismus (2021). Reisen in Zeiten von Corona.
Retrieved on 27-01-2025 from bzt.bayern/wp-content/uploads/2021/04/Reisen-in-Zeiten-von-Corona-BZT_April_2021.pdf

How much extra would you pay for an overnight stay in sustainable accommodation?

Share of respondents

Category	Share
up to 5 €	12%
5 to 10 €	28%
10 to 20 €	27%
20 to 50 €	10%
more than 50 €	2%
None, only for the same price I would prefer sustainable accommodation	21%

Source: Urlaubspiraten (2019). Welchen Aufpreis würdest du für eine Übernachtung in einer nachhaltigen Unterkunft zahlen?

2.5 Trust is the new currency in travel consulting

Due to the flood of information on the internet, the proportion of fake news, fake reviews, and manipulated campaigns is also growing. The increasing use of bots and other automated content providers also raises questions about credibility, authenticity, and authorship. In many cases, this is causing uncertainty and disorientation on the part of consumers.

Travelers are looking for testimonials
The travel industry is not unaffected by this megatrend. While travel agency employees and personal recommendations are used to help consumers make decisions, this task is now being taken over by review portals, social networks, and community platforms. However, as a result of increasingly bought reviews and manipulative algorithms, many of the major platforms have lost credibility and trust. Travelers are looking more than ever for testimonials and authentic sources that they can believe. To gain a competitive
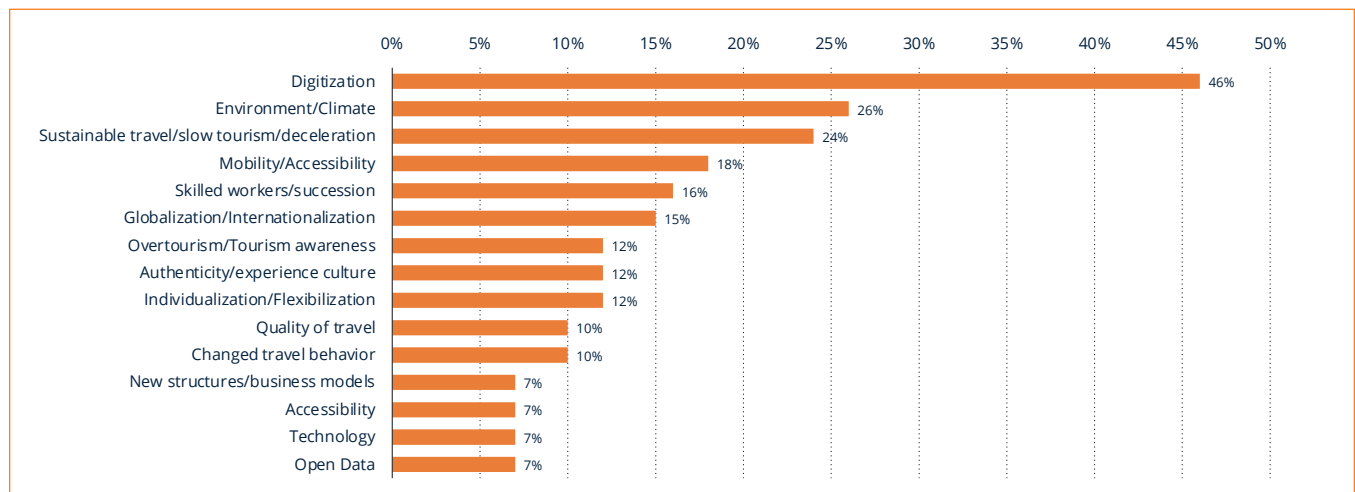
advantage under these conditions, it is becoming increasingly important for providers to build trusting relationships and sources of information.

Customer loyalty and brand profile
Building and maintaining reputable information forums are becoming important tools for customer loyalty and brand profiles. This also means that negative experiences should not be kept secret, but rather openly and constructively named. Regardless of the digitalization of customer relationships, personal conversations with customers are becoming more important again. Maintaining regular customers is also becoming more important. Regular customers create trust through authentic recommendations, ensure higher rebooking rates, and are loyal in times of crisis. In a world of manipulated reviews, they are becoming credible sources for travel decisions.

In your opinion, what are the three most important trends that will determine the development of tourism until 2030?

Survey on the most important trends in tourism in Germany up to 2030

Trend	%
Digitization	46%
Environment/Climate	26%
Sustainable travel/slow tourism/deceleration	24%
Mobility/Accessibility	18%
Skilled workers/succession	16%
Globalization/Internationalization	15%
Overtourism/Tourism awareness	12%
Authenticity/experience culture	12%
Individualization/Flexibilization	12%
Quality of travel	10%
Changed travel behavior	10%
New structures/business models	7%
Accessibility	7%
Technology	7%
Open Data	7%

Source: Federal Competence Center for Tourism

RECOMMENDATIONS

➔ **Asking your customers for honest reviews and responding openly to feedback creates authenticity and credibility in customer communication.**

➔ **Travel communities on platforms such as Reddit or Facebook are important platforms for sharing credible travel experiences.**

➔ **Loyalty discounts, little extras, and exclusive offers strengthen the loyalty of regular customers.**

➔ **Personalised support and individual contact via email or WhatsApp help to deepen relationships and generate referrals.**

3.1 Strategy and expertise are still the biggest areas where digitalization needs to catch up

■ Large parts of the travel industry still have a lot of catching up to do when it comes to digitalization. Important tasks such as the digitalization of products and processes, digital networking with partner organizations, or the development of an in-house digitalization strategy are still unresolved challenges in many companies. Only around forty percent of tourism companies would describe themselves as "advanced" when it comes to digitalization.
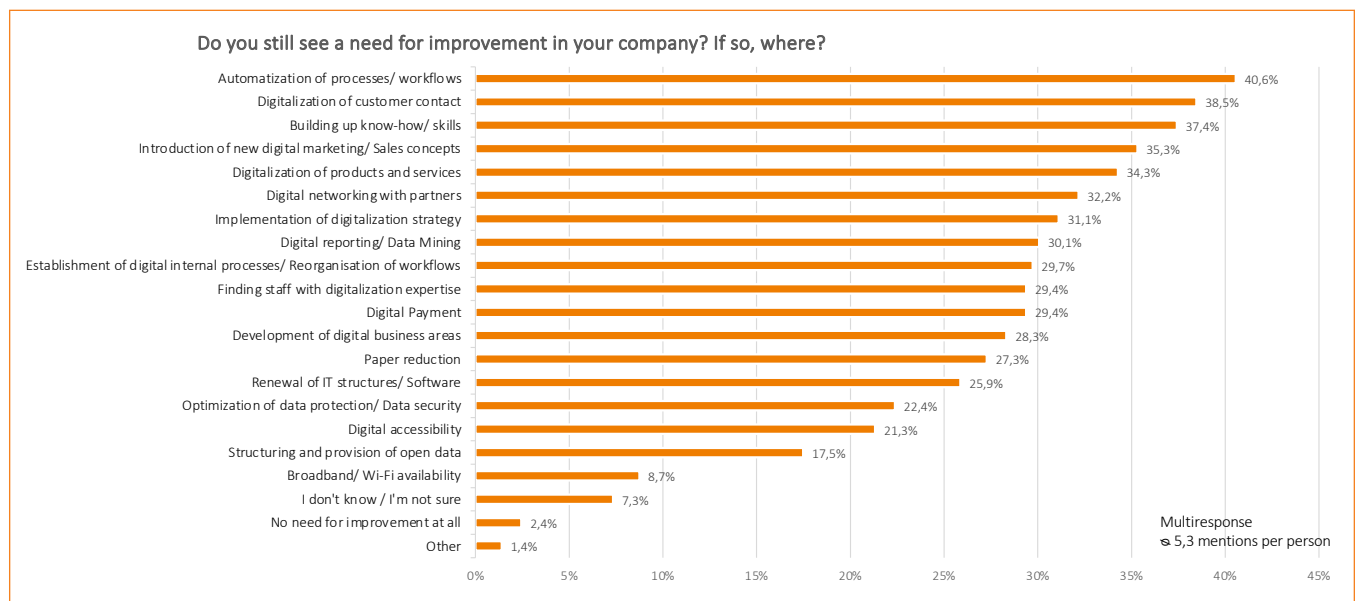
Lack of expertise and investment
Established providers in the ranks of tour operators and travel agencies in particular, but also many DMOs, are lagging in terms of development. The reasons for these deficits are manifold: a part of the market, including many medium-sized and owner-managed businesses, harbors a diffuse aversion to technology, shies away from the necessary investments, or does not

know how and where to find the right expertise. Given the dynamic technological development of the environment, these companies are at risk of falling further behind the competition.

Reorganization of work flow and work processes
To continue to be successful and overcome the challenges of transformation, extensive digital expertise is required. A high degree of entrepreneurial agility is also essential to hold one's own in a technology-driven market and against new competitors. The provision of the necessary investment capital, the reorganization of workflows and work processes, a pronounced focus on data and analysis as well as a corporate culture that enables flexibility and creativity are essential prerequisites for the development of a successful digitalization strategy.

Digitalization in General – Improvement

Do you still see a need for improvement in your company? If so, where?

Automatization of processes/ workflows	40,6%
Digitalization of customer contact	38,5%
Building up know-how/ skills	37,4%
Introduction of new digital marketing/ Sales concepts	35,3%
Digitalization of products and services	34,3%
Digital networking with partners	32,2%
Implementation of digitalization strategy	31,1%
Digital reporting/ Data Mining	30,1%
Establishment of digital internal processes/ Reorganisation of workflows	29,7%
Finding staff with digitalization expertise	29,4%
Digital Payment	29,4%
Development of digital business areas	28,3%
Paper reduction	27,3%
Renewal of IT structures/ Software	25,9%
Optimization of data protection/ Data security	22,4%
Digital accessibility	21,3%
Structuring and provision of open data	17,5%
Broadband/ Wi-Fi availability	8,7%
I don't know / I'm not sure	7,3%
No need for improvement at all	2,4%
Other	1,4%

Multiresponse
≈ 5,3 mentions per person

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ **Digitalisation requires the establishment of agile methods and management structures. Shorter decision-making paths and flatter hierarchies help to break up rigid structures.**

➔ **The development of expertise requires both internal and external measures. This includes the qualification and further training of our staff as well as the use of external IT service providers.**

➔ **The corporate culture must be attractive to skilled workers with digital expertise.**

➔ **A successful strategy requires a strong focus on data and analyses as well as the establishment of an efficient IT and interface structure.**

3.2 Digital and green transformation in tourism go hand in

■ A modern digital infrastructure and strategies based on it can make a decisive contribution to achieving sustainability goals. There are many untapped opportunities, particularly in digital communication with travellers to inform them about sustainable travel offers and travel practices.
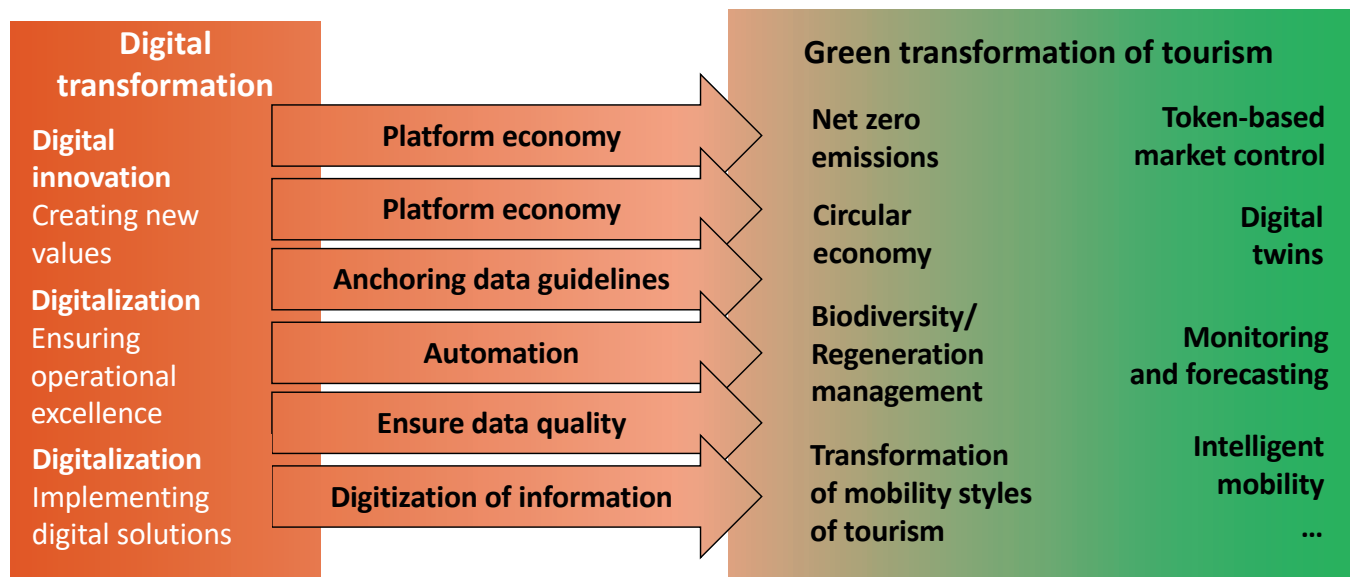
Information for tourists
According to surveys, many travellers still lack tailored offers on sustainability issues. From this perspective, the digital transformation is an opportunity to increase environmental sustainability. However, the necessary impetus for this must primarily come from the providers, as sustainability is not a priority for all customers when planning a trip. By utilising big data and artificial intelligence, tourism providers can help reduce the environmental impact of travel and promote the responsible use of resources.

AI offers extensive support
The reorganisation of a company's structure can make an important contribution to this: the introduction of hybrid working models and digital workplaces makes it possible to meet virtually, conserve resources and free up work capacity for other tasks. AI can provide helpful support in the provision of sustainability topics and guidelines on platforms and as part of marketing campaigns. AI-based predictive analytics make it possible to predict future trends and react proactively to changes. In this way, a variety of impulses for the transformation of mobility styles in tourism, the preservation of biodiversity or the improvement of the emissions balance can be communicated and anchored in the market.

Creating the conditions: Green transformation thanks to digital transformation

Digital transformation

Digital innovation
Creating new values

Digitalization
Ensuring operational excellence

Digitalization
Implementing digital solutions

Platform economy

Platform economy

Anchoring data guidelines

Automation

Ensure data quality

Digitization of information

Green transformation of tourism

Net zero emissions

Circular economy

Biodiversity/ Regeneration management

Transformation of mobility styles of tourism

Token-based market control

Digital twins

Monitoring and forecasting

Intelligent mobility

...

Source: Competence center for green tourism transformation, own illustration based on Aras, A. & Büyüközkan, G. (2023)

RECOMMENDATIONS

➔ Companies need to know and analyse the relevance of sustainability issues in the customer market.

➔ The use of AI offers a wide range of support for communicating topics and guidelines as well as for analysing future trends

➔ Hybrid working models support the green transformation in the company

3.3 The customer journey demands "seamless travel" through networking and personalization

The possibilities for personalizing the travel experience and the customer journey are now well-advanced thanks to technological innovation. This development is meeting with a customer market that is increasingly demanding these new possibilities. Recent surveys show that a majority of travelers expect individualized, tailored recommendations from providers based on past behavior and preferences.
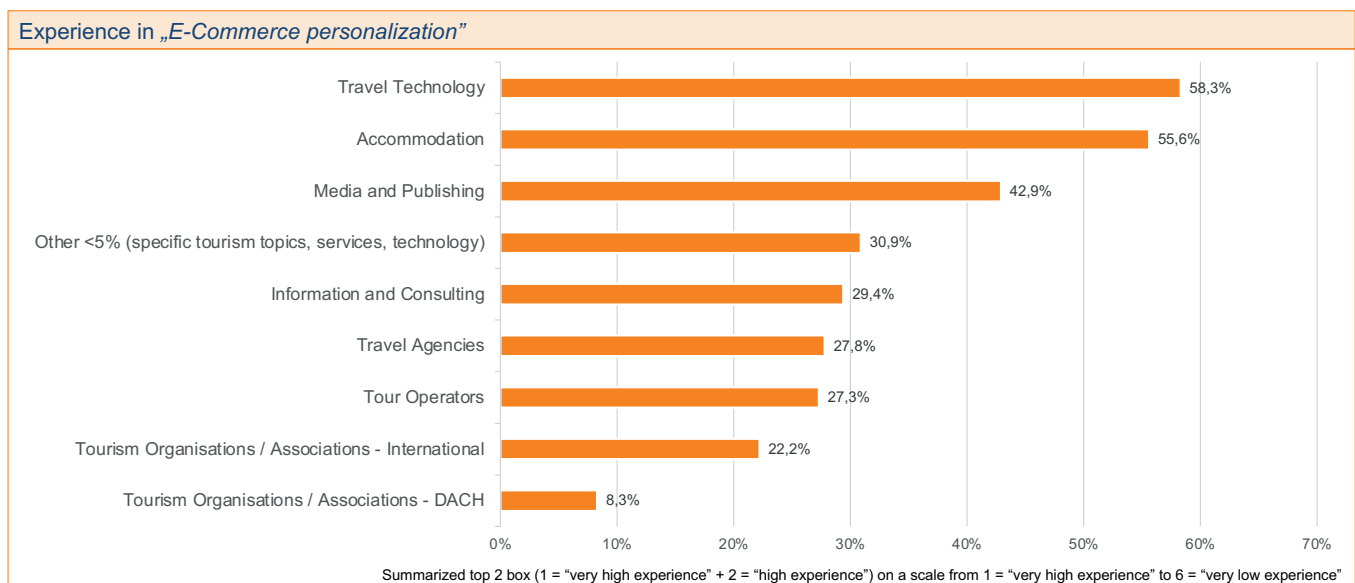
Need for real-time information
The experiences of the coronavirus pandemic have also led to a greater need for real-time information. Personalised travel recommendations and information therefore have a positive influence on purchasing decisions. This is particularly true for members of Generation Z and millennials, who favor seamless travel planning over traditional offers. Winning over young target

groups through personalized approaches opens up attractive regular customer business in the long term. A consistent strategy is required to align data collection, data management, and data analysis with these goals.

Personalized travel recommendations
Data analysis tools such as predictive analytics provide insights into preferences, behavior, and travel patterns. These form the basis for creating personalized travel recommendations, including tailored itineraries and suggestions based on specific interests. The analysis of historical and real-time data, data collection via social media tools, and offer design using AI-generated algorithms enable a personalized service that is experienced as authentic and individual.

Selected experiences in digitalization measures by market segment

Experience in „E-Commerce personalization"

Segment	Value
Travel Technology	58,3%
Accommodation	55,6%
Media and Publishing	42,9%
Other <5% (specific tourism topics, services, technology)	30,9%
Information and Consulting	29,4%
Travel Agencies	27,8%
Tour Operators	27,3%
Tourism Organisations / Associations - International	22,2%
Tourism Organisations / Associations - DACH	8,3%

Summarized top 2 box (1 = "very high experience" + 2 = "high experience") on a scale from 1 = "very high experience" to 6 = "very low experience"

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

→ Comprehensive data integration enables data compatibility and improves the quality of customer profiles. The combination of demographic data, historical data, and real-time data provides meaningful information.

→ Intensive engagement in social media improves the data basis: active interaction with users on social platforms – for example by responding quickly to comments – helps to understand the needs of users.

→ There is a need for greater cooperation between the public and private sectors to share real-time data such as delays or alerts.

→ Compliance with data protection and data security regulations should be communicated to customers.

3.4 Marketing requires standardised data collection

Data has become indispensable in the travel industry. It enables decision-making, planning, marketing and efficiency. It is the most important prerequisite for the further development of the company and its marketing strategy. What is not measured cannot be improved.
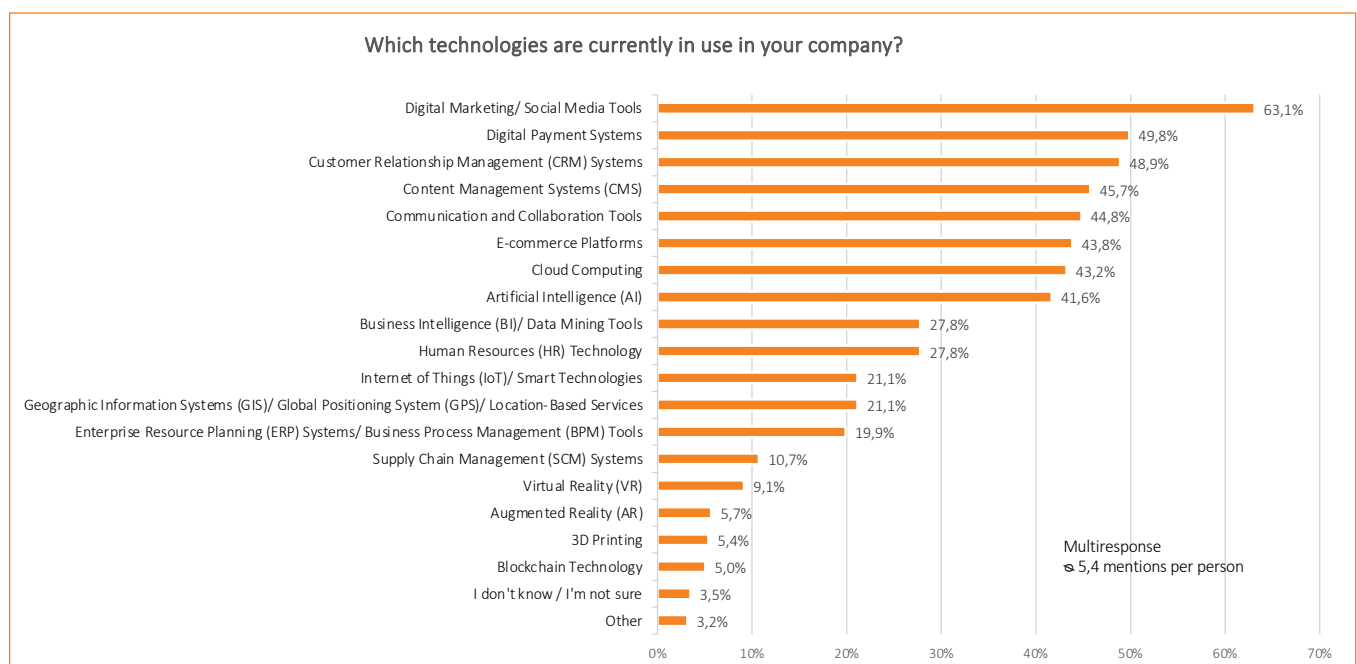
Analysis of existing customer data

Data-driven marketing gives destinations and companies the ability to anticipate and respond to evolving travel demand, optimise offers and improve the overall travel experience. In addition, standardised data collection enables a more efficient allocation of resources. By better targeting the relevant customer segments, the available marketing budget is optimised, improving cost efficiency and return on investment. Standardised data collection begins with the analysis of existing customer data to understand the behaviour, preferences and trends of your target groups.

Clear targets

The next step should be to define clear goals. These goals should be specific, measurable, relevant, achievable and defined in terms of time. As part of this objective, you can start collecting relevant data based on website analytics, social media and email campaigns. CRM systems help with the collection and organisation of this data. Building on this, effective data analysis helps to identify patterns and trends and segment them according to demographics, behaviour and preferences. These insights can form the basis for personalised marketing campaigns, generate target group-specific product recommendations or provide customer-relevant real-time information.

Digitalization in General – Technologies

Which technologies are currently in use in your company?

Technology	%
Digital Marketing/ Social Media Tools	63,1%
Digital Payment Systems	49,8%
Customer Relationship Management (CRM) Systems	48,9%
Content Management Systems (CMS)	45,7%
Communication and Collaboration Tools	44,8%
E-commerce Platforms	43,8%
Cloud Computing	43,2%
Artificial Intelligence (AI)	41,6%
Business Intelligence (BI)/ Data Mining Tools	27,8%
Human Resources (HR) Technology	27,8%
Internet of Things (IoT)/ Smart Technologies	21,1%
Geographic Information Systems (GIS)/ Global Positioning System (GPS)/ Location-Based Services	21,1%
Enterprise Resource Planning (ERP) Systems/ Business Process Management (BPM) Tools	19,9%
Supply Chain Management (SCM) Systems	10,7%
Virtual Reality (VR)	9,1%
Augmented Reality (AR)	5,7%
3D Printing	5,4%
Blockchain Technology	5,0%
I don't know / I'm not sure	3,5%
Other	3,2%

Multiresponse
ⵗ 5,4 mentions per person

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

→ **Investments in a solid and robust data infrastructure support marketing.**

→ **Tools such as Google Analytics help to collect demographic data and interests.**

→ **By utilising geo and location data, companies can provide more relevant information.**

→ **Investments in technologies that enable real-time data processing ensure greater flexibility.**

3.5 Crisis management, adaptability, and change management are an expression of resilience in tourism

For many of the companies surveyed, crises and geopolitical tensions represent decisive hurdles for operations and marketing. Many of them also see crisis communication as a central component of their marketing mix. Compared to other sectors, the tourism industry proves to be very susceptible to crises. Nevertheless, it manages to recover time and again and achieve or even exceed past booking figures.

Positive effects of the crisis
However, recent events have shown that the industry must strengthen its resilience in the future. This is particularly true in light of the coronavirus pandemic, during which many employees left the tourism industry and did not return. However, positive effects of the crisis have also been observed in parts of the industry. The abrupt halt to the daily work routine during the pandemic opened up the opportunity to scrutinize previous working methods and habits, say goodbye to outdated processes, or develop new approaches. In the best-case scenario, crises can provide the impetus for a comprehensive change process, such as a comprehensive restructuring of content or organization.

New networks and cooperations
Another positive effect of the past crisis is that many tourism networks and the cooperation within these networks have become stronger and more resilient. Strengthening cooperation and networks will also contribute to greater resilience in tourism in the future.

Selected marketing challenges by market segment

Challenge: „Crisis management"

Segment	Value
Tourism Organisations / Associations - International	28,6%
Information and Consulting	25,0%
Travel Agencies	20,0%
Other <5% (specific tourism topics, services, technology)	12,7%
Tour Operators	10,0%
Tourism Organisations / Associations - DACH	7,7%
Media and Publishing	5,6%
Accommodation	3,2%
Travel Technology	0,0%

Summarized agreement (top 2 box: 1 = "strongly agree" + 2 = "agree") on a scale from 1 = "strongly agree" to 6 = "strongly disagree"

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ Preparation for future crises must be improved. Previous reactions to crises should be analyzed about their suitability for the future and adapted if necessary. Crisis management, crisis review, and crisis prevention belong together.

➔ The expansion of networks and relationships strengthens the company's resilience and flexibility. This applies both to internal structures about managers and employees and to external relationships with other organizations and partner companies.

➔ Transparent and honest internal communication strengthens the team and employee loyalty.

➔ Precise knowledge of your key figures enables active and flexible crisis management.

4.1 The shortage of labor requires cultural change management

The skills and labor shortage continues, particularly in the hotel and catering industry and in tourism training occupations in general. The tourism industry has a considerable image problem as an employer and is associated with weekend work, unattractive working hours, and comparatively low salaries. The labor shortage has worsened in many companies during the coronavirus crisis.
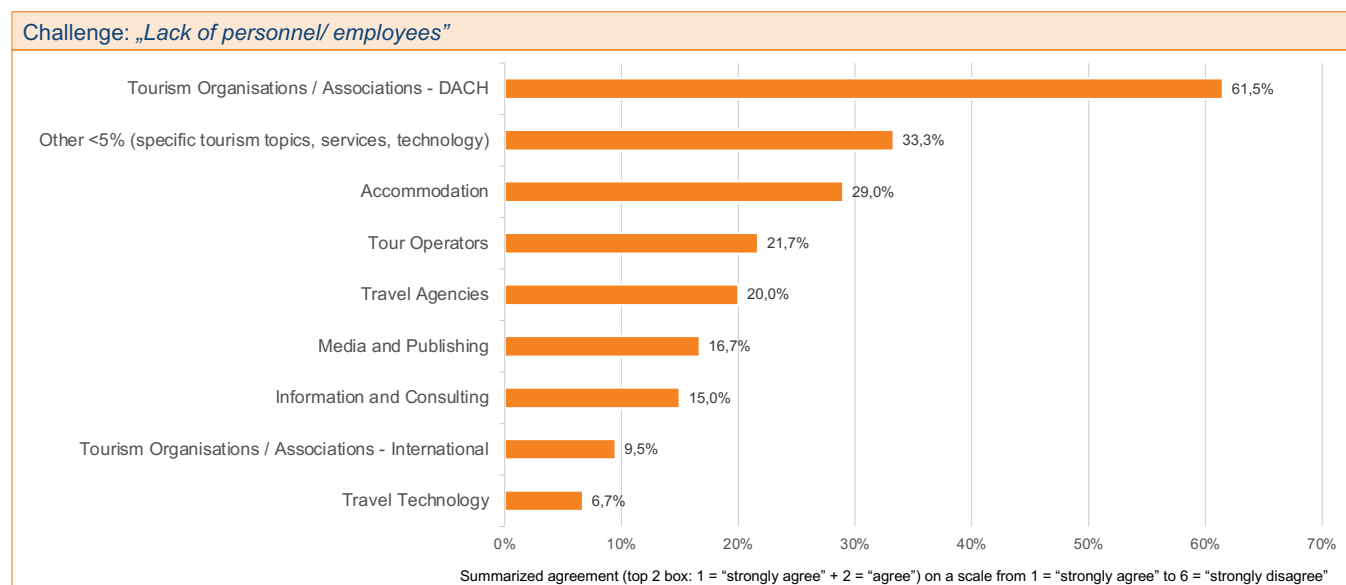
Salary increases are almost impossible
As profit margins have been under pressure for years, salary increases are in many cases almost impossible to realize economically. And other attractive offers for employees, such as working from home or flexible working hours, are often not realistic for the industry. When further developing its own corporate culture, high priority must therefore be given to the issues

of staff recruitment and staff retention. The tourism industry must realize that as an employer it competes with other sectors that are often perceived as more attractive. In practice, this means a conflict between different corporate cultures, which the tourism industry must increasingly face up to.

The needs of different generations
Against this backdrop, strategies must be developed to harmonize opposing cultures to promote synergies, innovation, and mutual understanding. It is also important to scrutinize and renew one's own corporate culture. Another "culture clash" exists between the needs and views of different generations. Here, too, bridges must be found to address and attract the talents of the future.

Selected marketing challenges by market segment

Challenge: „Lack of personnel/ employees"

Segment	Value
Tourism Organisations / Associations - DACH	61,5%
Other <5% (specific tourism topics, services, technology)	33,3%
Accommodation	29,0%
Tour Operators	21,7%
Travel Agencies	20,0%
Media and Publishing	16,7%
Information and Consulting	15,0%
Tourism Organisations / Associations - International	9,5%
Travel Technology	6,7%

Summarized agreement (top 2 box: 1 = "strongly agree" + 2 = "agree") on a scale from 1 = "strongly agree" to 6 = "strongly disagree"
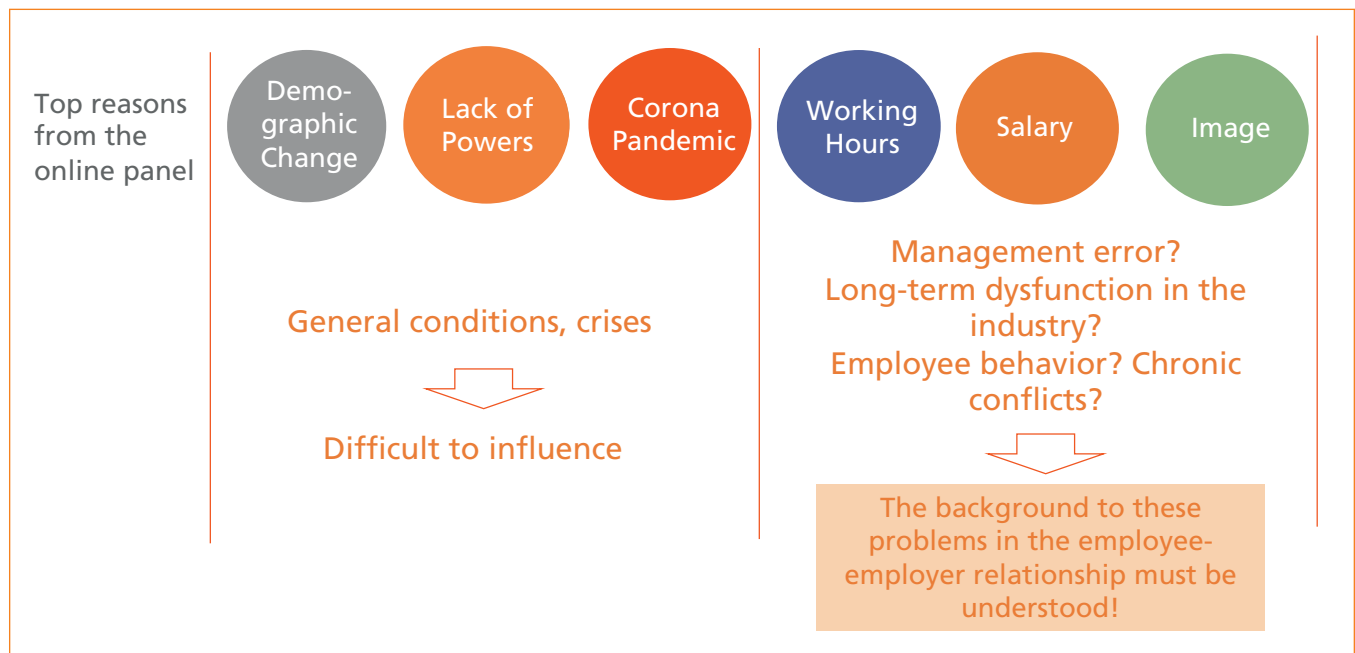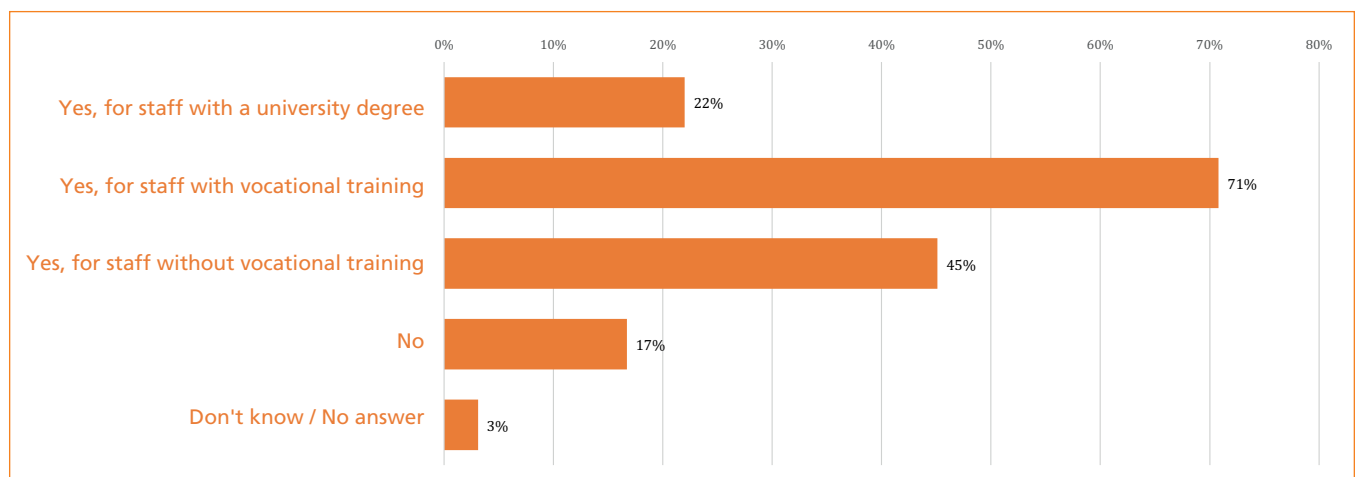
Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ A situation analysis involving workshops with employees helps to identify the strengths and weaknesses of the employer brand.

➔ Positioning your own company as an employer brand raises its profile. Positive features of your job offer must be identified and emphasized.

➔ The needs and wishes of the younger generation in the workplace must be taken seriously. The dialogue with millennials and Generation Z helps to understand, reach, and retain young talent.

➔ Middle decision-making levels in the company should be actively involved in personnel issues.

Reasons for the staff shortage

Top reasons from the online panel

- Demo-graphic Change
- Lack of Powers
- Corona Pandemic
- Working Hours
- Salary
- Image

General conditions, crises

⬇

Difficult to influence

Management error?
Long-term dysfunction in the industry?
Employee behavior? Chronic conflicts?

⬇

The background to these problems in the employee-employer relationship must be understood!

Source: Federal Ministry for Economic Affairs and Climate Action, Competence center for green tourism transformation, Online Panel 2/2022 "Labor/skills shortage"

Do you currently have labour/skilled labour shortages in your organization?

Category	Percentage
Yes, for staff with a university degree	22%
Yes, for staff with vocational training	71%
Yes, for staff without vocational training	45%
No	17%
Don't know / No answer	3%

Source: Federal Ministry for Economic Affairs and Climate Action, Competence center for green tourism transformation, Online Panel 2/2022 "Labor/skills shortage"

5.1 High-yield tourism is a contribution to risk provisioning

In most cases, growth strategies in tourism companies are aimed at increasing the number of bookings and guests. Given the generally low margins in the tourism industry, current crises, and the increasing problem of over-tourism, it seems sensible to focus on a more qualitative orientation of one's own business. This assessment can also be observed in the survey. Many of those surveyed believe that revenue per traveler is more important than the total number of travelers. As part of this approach, high-yield tourism represents a strategic approach for destinations and companies that can be used to achieve balanced growth.

High-quality experiences and personalized service
 The aim is to address, acquire, and retain high-yield customer groups. These target groups are of growing importance for sustainable and equitable tourism development. High-yield customers are looking for high-quality experiences, value exclusive additional services, and appreciate personalized and individual service. Compared to other customer groups, they have significantly greater purchasing power and willingness to spend. The customer market spans all market segments, including leisure, business, and VFR travel as well as niche offers in areas such as medical or educational tourism.

Several positive economic effects
The realization of this approach is associated with the hope of several positive economic effects: Higher spending by high-yield tourists per visit compared to other visitor groups, higher regional economic effects, more revenue with fewer visitors, and an increase in sustainability.

Selected statements by market segment

Statement: „*The number of visitors is less important for my company than the value of the individual visitor*"

Segment	Value
Information and Consulting	60,0%
Tour Operators	51,7%
Travel Agencies	50,0%
Media and Publishing	44,4%
Tourism Organisations / Associations - International	42,9%
Other <5% (specific tourism topics, services, technology)	36,5%
Accommodation	32,3%
Travel Technology	26,7%
Tourism Organisations / Associations - DACH	23,1%

Summarized agreement (top 2 box: 1 = "strongly agree" + 2 = "agree") on a scale from 1 = "strongly agree" to 6 = "strongly disagree"
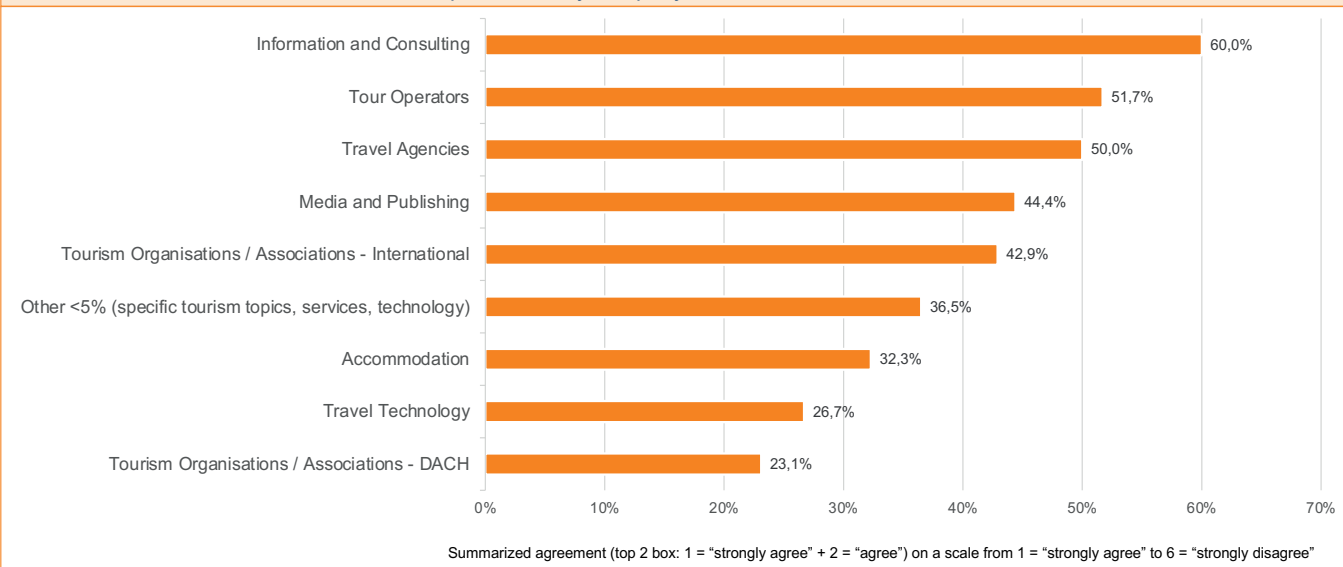
Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ High-quality hotel and accommodation offers are indispensable for addressing high-yield travelers.

➔ Exclusivity, VIP experiences, and personalized offers stand for added value.

➔ Observe the market segment on the internet. Social media and influencers have a major influence on the travel decisions of many high-yield tourists.

➔ The determination of relevant key figures (yield rate percent, employment generated per thousand visitors, gross operating surplus) facilitates the calculation.

6.1 AI revolutionises customer communication and booking processes

Artificial intelligence is not only changing the customer journey through personalization and automation but also through a new type of search logic. A growing number of consumers are communicating primarily in the context of AI-supported dialogue (e.g. with chatbots or voice assistants), which means that traditional search results and alternative travel offers are increasingly being pushed out of the spotlight. AI-supported search engines and assistants such as Google Travel, ChatGPT, or voice assistants reduce the variety of available offers by presenting only a selected number of results.

Fundamental changes and new rules
Websites that do not provide AI-optimised content are no longer recommended by the AI systems, which fundamentally changes the competition and the rules of digital visibility. Instead of a broad selection from tradi-

tional search engines or online travel agencies (OTAs), the customer is presented with a curated, algorithmically optimized suggestion in the AI dialogue – often based on preferences, user behavior, and existing data partnerships between the big tech companies.

The role of large platforms
The winners of this development are large platforms with their own AI, such as Google, Amazon or Booking, as well as companies that optimize their content for AI-supported systems. Traditional providers, on the other hand, are threatened with marginalization. They are losing market share because customers are booking directly via AI-optimised systems without actively comparing alternative offers. Providers who leave their content unchanged and are therefore no longer prioritized by the AI models will be the losers.

AI – Benefits
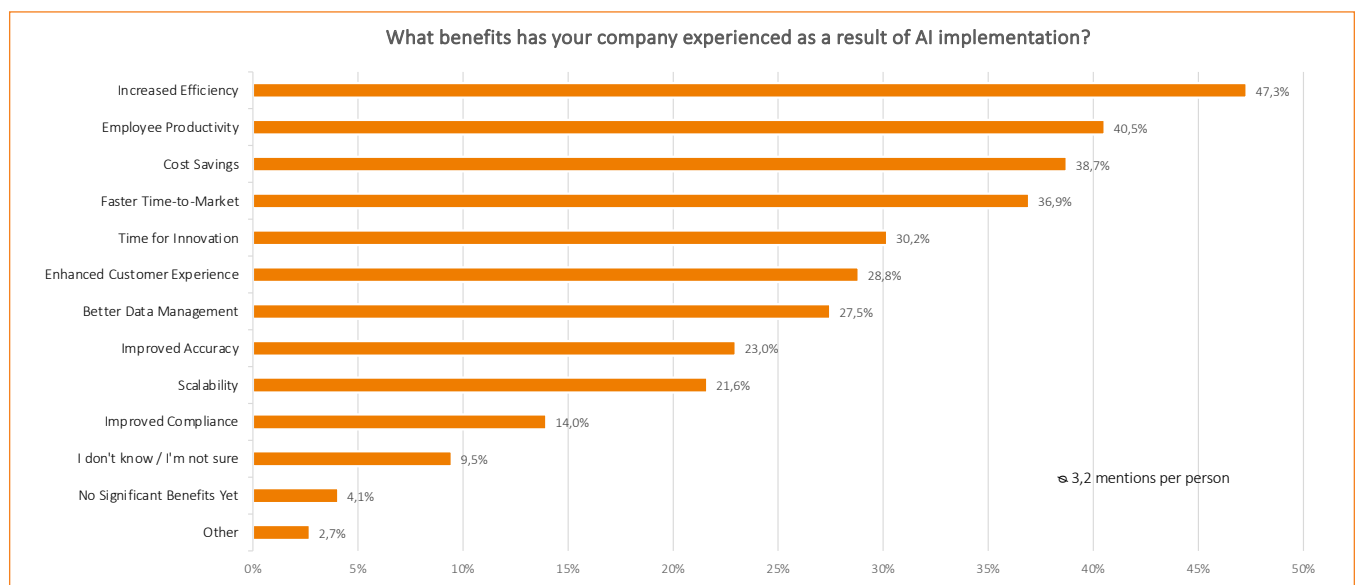
Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

➔ AI-optimised offers require website content to be adapted for AI-supported search systems (structured data, natural language, relevant keywords).

➔ Providing FAQ sections and informative articles on common customer questions that can be captured by AI systems increases visibility.

➔ The implementation of AI-supported chatbots and automated advisory systems promotes dialogue with customers.

➔ Personalised travel suggestions based on previous bookings and preferences strengthen customer loyalty.

6.2 AI competencies in tourism are insufficient. The disruption of the industry through AI requires decisive action

■ AI is becoming the basis for processes and business models in more and more sectors of the economy. However, the actual use of AI is often only superficial or fragmented. The tourism industry is no exception. Many companies only use AI selectively by using chatbots or automated analyses.

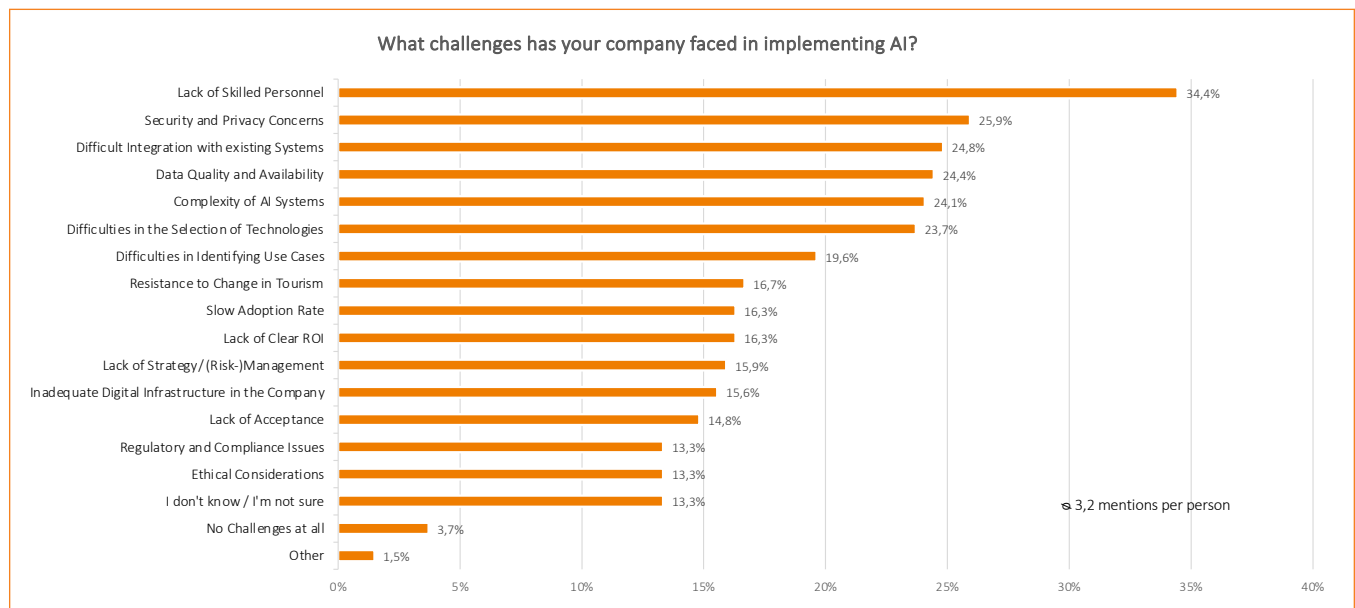### Deeper integration into the value chain
However, deeper integration into value chains, marketing strategies, or decision-making processes is still far too rare. Given the rapidly changing competitive environment due to AI, these measures should be given high priority. However, many tourism companies do not yet have the necessary resources and expertise. According to studies, there is a lack of experts for AI implementation and strategy in many areas, which slows down the pace of development. In addition, there is a lack of clarity in many boardrooms about the

goals to be achieved. Although many companies use AI tools, they do not have a long-term strategy for scaling the technology effectively.

Regulations and legal requirements
There is also uncertainty about regulations and legal requirements: Unresolved issues regarding ethical aspects, data protection, and data security mean that companies are hesitant to invest in AI. Against this backdrop, the imbalances in the market threaten to become pronounced: While large tech corporations such as Google or Amazon have comprehensively integrated AI into their business models, traditional SMEs remain at the level of pilot projects and isolated applications. These companies urgently need to invest in AI expertise, strategic integration, and further training to close the gap between urgency and actual utilization.

AI – Challenges

What challenges has your company faced in implementing AI?

Challenge	Percentage
Lack of Skilled Personnel	34,4%
Security and Privacy Concerns	25,9%
Difficult Integration with existing Systems	24,8%
Data Quality and Availability	24,4%
Complexity of AI Systems	24,1%
Difficulties in the Selection of Technologies	23,7%
Difficulties in Identifying Use Cases	19,6%
Resistance to Change in Tourism	16,7%
Slow Adoption Rate	16,3%
Lack of Clear ROI	16,3%
Lack of Strategy/(Risk-)Management	15,9%
Inadequate Digital Infrastructure in the Company	15,6%
Lack of Acceptance	14,8%
Regulatory and Compliance Issues	13,3%
Ethical Considerations	13,3%
I don't know / I'm not sure	13,3%
No Challenges at all	3,7%
Other	1,5%

⌀ 3,2 mentions per person

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

→ The development of a holistic AI strategy must encompass processes, marketing, and decision-making.

→ Scalable findings from smaller pilot projects can be systematically integrated into other business areas.

→ Optimising your website and booking systems for AI-supported systems (e.g. through structured data and API interfaces to AI platforms) increases discoverability.

→ Cooperations with AI-enabled platforms (e.g. Google Travel, voice assistants) help us to remain visible.

→ Customer loyalty through personalized recommendations and automated AI-supported advice strengthens direct sales.

6.3 AI is becoming a game changer between diffuse fears and new opportunities

In a dynamic competitive environment, medium-sized companies in particular are facing the acute challenge of implementing AI in their business processes. The basic willingness to take this step is present in many places: 58 percent of tourism players who have not yet used AI tools want to use the technology in the next two years. Despite this motivation, however, the obstacles are manifold: by far the most important obstacle is the lack of suitable specialized staff. In the survey, every third organization sees this as the biggest problem.
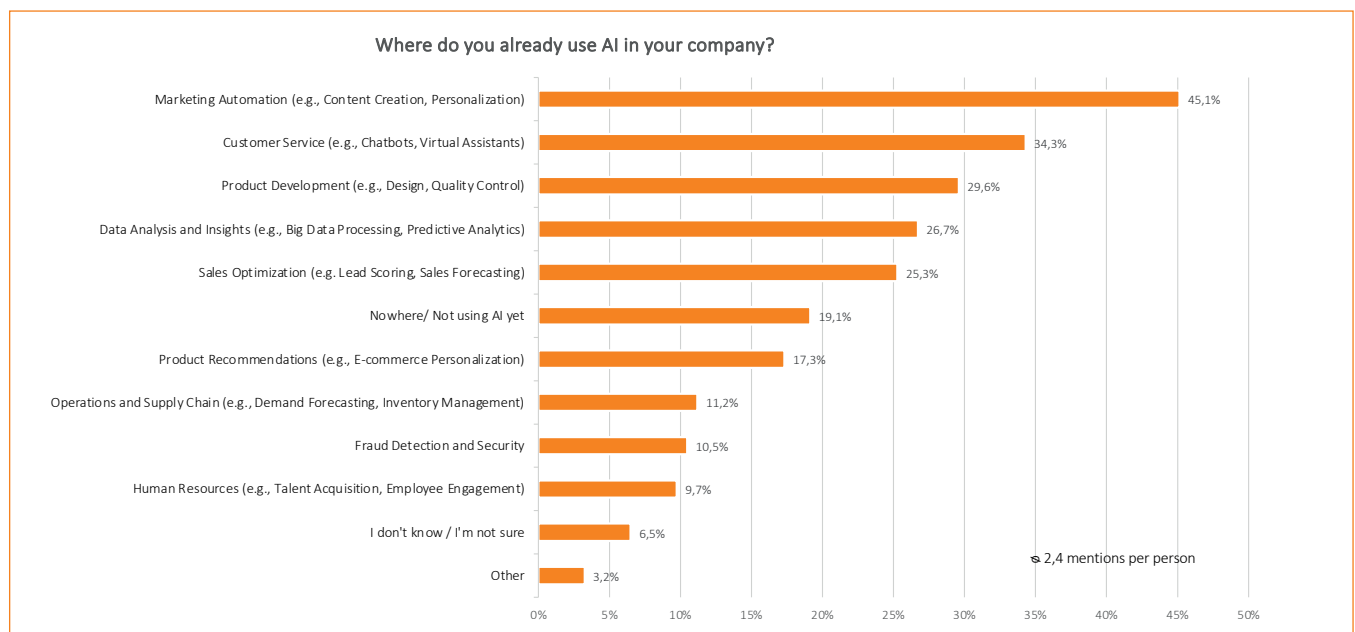
Data Protections and security concerns
The survey also revealed several other obstacles, ranging from data protection and security concerns and

ethical aspects to fundamental questions of practical feasibility. The survey results also reveal psychological barriers such as fear of change and uncertainty. The existing IT infrastructure still appears to be working well for the company's business model, which means that a comprehensive restructuring process is being shied away from. However, the speed of the transformation triggered by AI is massively underestimated.

Rapidly changing market
A fundamental change in mentality within the company and greater acceptance of the current transformation appear to be urgently required. The first steps may be particularly difficult, but they are essential to survive in a rapidly changing market.

AI – Use

Where do you already use AI in your company?

Category	Percentage
Marketing Automation (e.g., Content Creation, Personalization)	45,1%
Customer Service (e.g., Chatbots, Virtual Assistants)	34,3%
Product Development (e.g., Design, Quality Control)	29,6%
Data Analysis and Insights (e.g., Big Data Processing, Predictive Analytics)	26,7%
Sales Optimization (e.g. Lead Scoring, Sales Forecasting)	25,3%
Nowhere/ Not using AI yet	19,1%
Product Recommendations (e.g., E-commerce Personalization)	17,3%
Operations and Supply Chain (e.g., Demand Forecasting, Inventory Management)	11,2%
Fraud Detection and Security	10,5%
Human Resources (e.g., Talent Acquisition, Employee Engagement)	9,7%
I don't know / I'm not sure	6,5%
Other	3,2%

ø 2,4 mentions per person

Source: ITB Travel & Tourism Radar

RECOMMENDATIONS

→ Transparent communication and targeted training programs can reduce fears and reservations and increase acceptance of AI.

→ Gradual implementation using pilot projects helps to gain initial experience and demonstrate the benefits of AI in your own company.

→ Cooperation with research institutions or specialized service providers enables companies to compensate for a lack of expertise and benefit from best practices.

Study

The Travel and Tourism Radar Study, a collaborative initiative of ITB Berlin and Ostfalia University of Applied Sciences, is based on regular online surveys of the global travel community. To date, three waves of surveys have been conducted:

1st Online Survey
• Period: 05.06. – 19.06.2024
• 18 Questions
• Topic: Business Climate & Sustainibility
• Convenience Sampling: ITB Community (Newsletter and Social Media)
• Sample Size: 414
• Fully Completed Surveys: 332

2nd Online Survey
• Period: 07.10. – 20.10.2024
• 20 Questions
• Topic: Digitalization & AI
• Convenience Sampling: ITB Community (Newsletter and Social Media)
• Sample Size: 433
• Fully Completed Surveys: 332; 59 Screenouts (Question 8)

3rd Online Survey
• Period: 06.01.2025 – 28.01.2025
• 18 Questions
• Topic: Specific Marketing Knowledge
• Convenience Sampling: ITB Community (Newsletter and Social Media)
• Sample Size: 281
• Fully Completed Surveys: 191

Tools: LamaPoll via Messe Berlin, SPSS Statistics

Imprint

A brand of

MESSE BERLIN

Ostfalia Hochschule für angewandte Wissenschaften

neusta Grafenstein