

IDEAS that travel:

How tourism brands win the race
for tomorrow's customers

TOURISE

TOURISM RISING



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Introduction

Developed in collaboration with TOURISE, this report examines the state of marketing and creativity in the tourism industry.

Our study draws on a global consumer survey of international travelers, in-depth interviews with sector leaders, and analysis of LIONS’ knowledge bank of marketing research and case studies to form a comprehensive perspective of the current state of tourism marketing.

The result is a practical playbook designed to help tourism brands take a decisive step forward.

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Foreword from TOURISE



His Excellency Ahmed Al Khateeb

Minister of Tourism and
Chairman of TOURISE

Tourism is undergoing one of the most significant transformations in its modern history. Competition is no longer defined solely by destinations, but by the experiences, narratives, and emotional connections that shape how travelers engage with the world.

The sector continues to demonstrate remarkable momentum. Travel demand is rising, younger generations are prioritizing experiences over possessions, and emerging destinations are gaining international attention at unprecedented speed. At the same time, traveler expectations are evolving rapidly. People increasingly seek experiences that feel personalized, relevant, and aligned with their values and aspirations.

As tourism competes within the broader experience economy, travelers are looking for more than places to visit. They are seeking meaning, connection, perspective, and cultural relevance. In this environment, creativity becomes far more than a communications tool; it is a strategic driver of differentiation, competitiveness, and long-term value.

The IDEAS framework offers a valuable lens through which destinations can respond. By focusing on investment, distinctiveness, engagement, authenticity, and seamlessness, it highlights the capabilities needed to build trust, strengthen emotional connections, and deliver exceptional experiences.

At the same time, artificial intelligence, personalization tools, and connected digital ecosystems are reshaping how travel is discovered, planned, and experienced. As destinations compete for attention in increasingly AI-mediated environments, relevance will become as important as visibility. Yet one principle remains unchanged: the future of tourism will continue to depend on human creativity, authentic storytelling, and meaningful experiences.

At TOURISE, we believe the future of tourism will be shaped through collaboration across industries and disciplines. The destinations that succeed will be those that build meaningful, trusted, and memorable experiences that endure long after the journey ends.

Foreword from LIONS



Paul Coxhill

Chief Operating Officer &
President, LIONS

At LIONS, we know creativity is a commercial advantage.

We see it every day in the award-winning work recognized at Cannes Lions and Effie, in the evidence captured by WARC, and in the ideas tracked by Contagious.

The data also proves it. Numerous empirical studies evidence creativity's role in business growth. In one recent study commissioned by LIONS, Interbrand analyzed more than 40,000 data points across 50 publicly traded, Lion-winning brands. It found that, within 12 months of receiving creative recognition, those companies delivered an average 2.7% increase in EBIT and a 4.7% increase in market capitalization above the traded average.

High-quality creativity strengthens competitive advantage in the market.

At the heart of that advantage are some enduring communications principles. Distinctiveness makes a brand easier to recognize and choose. Emotion makes it easier to remember. Consistency builds memory over time.

The tourism sector is fertile ground for creative effectiveness. Few categories deal so directly in

emotion, experience, and memory. The product is a lived, immersive experience. It's chosen for its distinctive culture or attractions. It's highly anticipated beforehand and remembered for a lifetime after.

Yet that does not make tourism communications simple. The sector straddles government, technology, society, and entertainment. All of which are in constant state of change. And in recent years, the sector has seen massive shifts in how people discover, book, and engage with destinations. And while demand is rising, so is competition and complexity.

This study, done in partnership with TOURISE, was designed to make sense of that changing landscape. It brings together consumer research, expert perspectives, evidence and case studies for a comprehensive look at the direction the sector is headed.

In this report, we identify five emerging trends disrupting the tourism sector and how marketers must evolve their practice in order to turn those shifts into commercial advantage. The result is the IDEAS framework: principles for tourism marketers to achieve creative effectiveness.

We hope the report is a useful tool to help destination and brand marketers harness the immense opportunity that exists in tourism marketing.

Consumer survey

This research is based on an online survey conducted in December 2025.

The survey consisted of 8,374 respondents across 13 markets globally.

Respondents were consumers who had traveled overseas in the previous 12 months.

Global sample in this consumer survey was as follows:
UK (n = 858), KSA + UAE (n = 850), Germany (n = 841), China (n = 837), France (n = 835), India (n = 830), USA (n = 819), Brazil (n = 447), South Africa (n = 424), Canada (n = 410), South Korea (n = 409), Japan (n = 408), and Australia (n = 406).

Expert perspectives

To contextualize the findings, we incorporated perspectives from industry leaders on the future of travel and tourism



Ageel Alshaibani
CEO
Saudi Tourism Authority



Gonzalo Brujó
CEO and Global Chairman
Interbrand



David Droga
Vice Chair
Accenture



Tony Fernandes
CEO, Capital A
Co-Founder, AirAsia



Jane Sun
CEO
Trip.com Group



Martin Nydegger
CEO
Switzerland Tourism



Miguel Sanz Castedo
CEO
Turespaña



Joanne Chehab
Head of MENA Global
Business Solutions
ByteDance / TikTok



Caspar Lee
Co-founder and CVO
Influencer.com



Christie Travers-Smith
Director of EMEA
Strategic Partnerships
Google

Report overview

1 Five forces reshaping travel demand

Travel demand is rising, but the way travelers choose destinations is changing. This chapter identifies five forces reshaping the category: rising demand, more personal intent, story-led discovery, fragmented trust, and AI-accelerated expectations.

2 IDEAS that travel: the new playbook for growth

Tourism marketing needs to evolve fast enough to match these shifts in traveler behavior. This chapter introduces the **IDEAS** framework, examining where the industry is falling behind and how brands can respond with **investment, distinctiveness, engagement, authenticity and seamlessness**.

3 IDEAS in practice

This chapter brings the IDEAS framework to life through a showcase of winning case studies from brands putting it into practice.

The race for tomorrow's travel customer

Travel & tourism is vital to the global economy, accounting for 9% of GDP and supporting more than 366 million jobs worldwide.

Tourism is not an isolated economic engine, but the central spoke in a wider system that drives sustainable, long-term prosperity: strengthening communities, enhancing infrastructure, elevating culture, and amplifying global influence.



Direct Benefits:

Tourism revenues and employment.

Support and stimulus for local businesses.

Catalyst for infrastructure upgrades.

Magnet for inward investment.



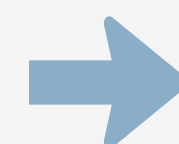
Indirect Benefits:

Additional source of national pride and identity.

Increased cultural influence and soft power.

Greater probability of hosting major events.

Stronger international relations.



This growth, however, is not guaranteed or evenly distributed. Tourism destinations and brands must take the necessary steps to capture this opportunity.

1 Five forces reshaping travel & tourism

This chapter outlines the shifts facing tourism by examining how traveler demand, motivations, and behaviors are evolving.



Force 1: Travel demand is rising

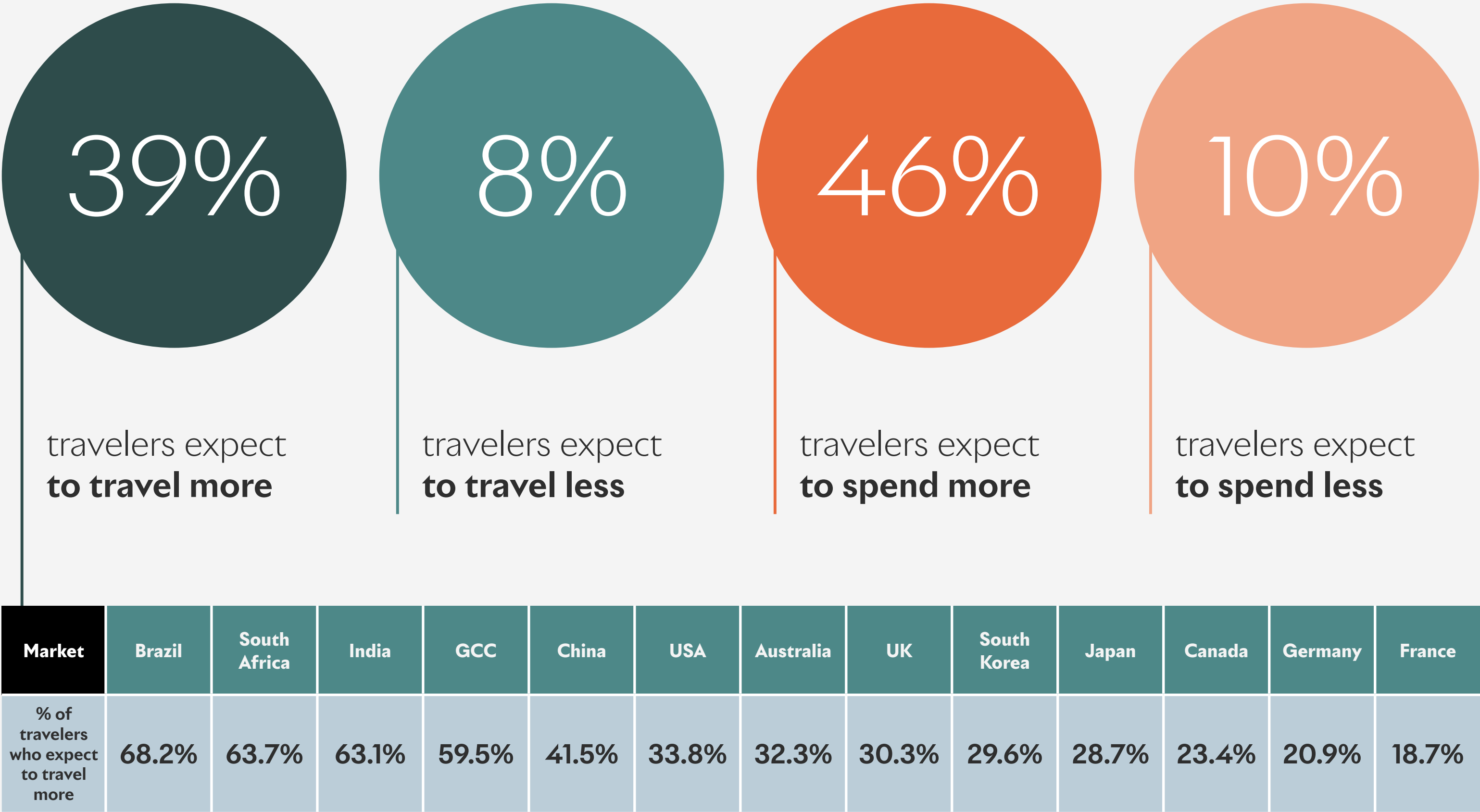
More travel, more spend

Travel intent and spend are rising globally, especially among younger travelers and emerging markets.

In exclusive research commissioned for this report, 39% of people say they expect to travel more in the next 12 months than they did in 2025. Just 8% expect to travel less. Emerging markets such as Brazil and India are leading the next wave of travel growth.

Younger generations are particularly inclined to travel, with 51% of Gen Z and 47% of Millennials planning to travel more in the coming year.

Travel budgets are increasing with demand. Almost half of global travelers expect to spend more on travel in 2026. Only 10% plan to decrease their spend this year.



Source: LIONS Advisory & Saudi Tourism Authority, 'International Travelers Survey', December 2025.

Force 2: Intent is increasingly personal

Driven by individuality

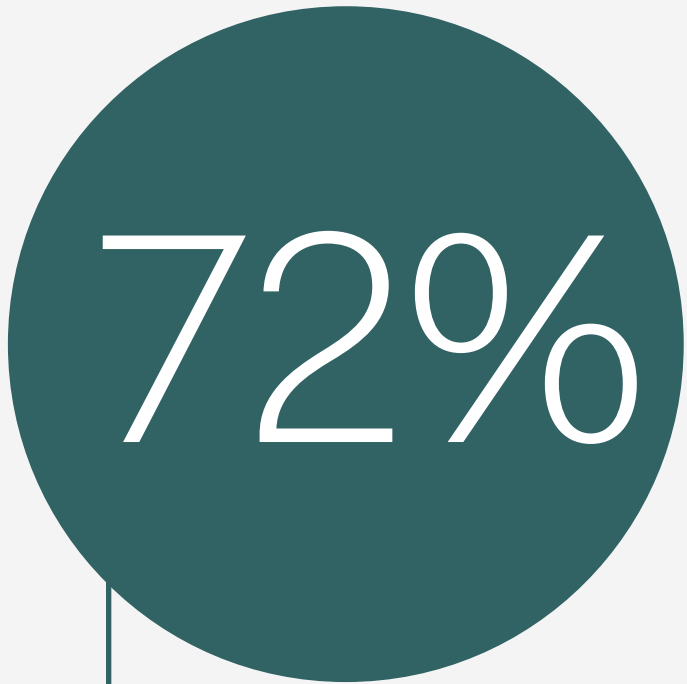
As travelers seek experiences that feel unique, appetite for travel has expanded beyond generic destinations.

While broad motivations such as relaxation, value and escape remain foundational, travelers also seek experiences that reflect their interests, identities, and aspirations.

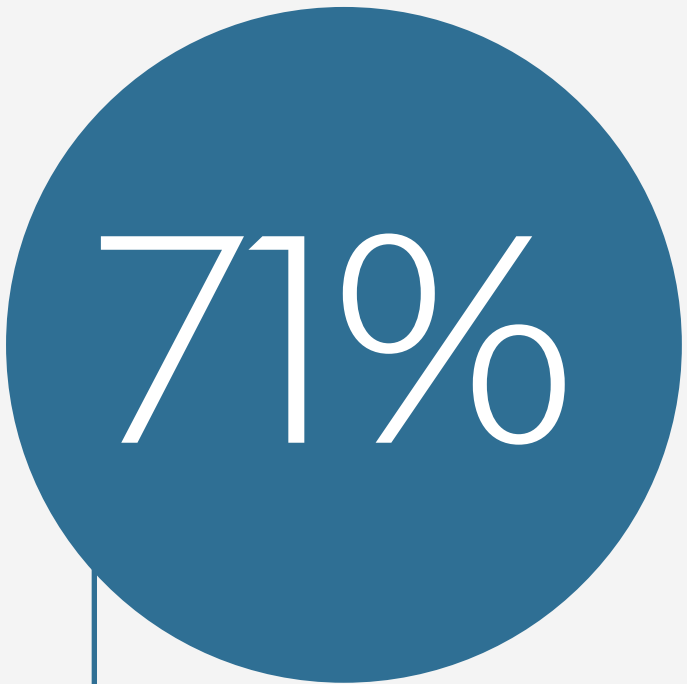
Our research shows that 72% of travelers expect brands to recommend experiences based on their interests, from culture and adventure to wellness and entertainment.

Nearly three in four travelers say they are considering visiting emerging or less-traveled destinations in the next year. This does not mean traditional tourism hotspots are disappearing: McKinsey has noted that 80% of travelers still visit just 10% of destinations globally.

This signals a growing openness to destinations that feel more distinctive. In a choice-rich environment, travelers desire destinations with a clear sense of character, culture and difference.



of travelers expect brands to **recommend experiences based on their interests**
For example, sport, history, entertainment, wellness, adventure, culture, etc.



of travelers are considering **visiting an emerging or less-traveled destination** in the coming year

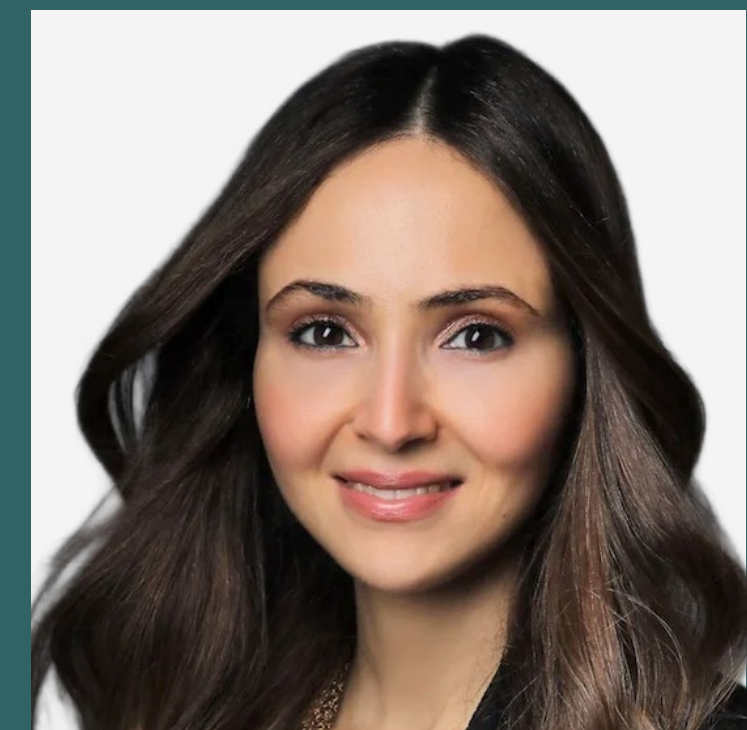
Foundational motivators				
Needs many destinations can satisfy				
Relaxation and escape	Value for money	Safety and convenience		

Differentiating motivators				
Experiences shaping preference and choice				
Culture and history	Adventure and exploration	Passions and interests (e.g., sports & entertainment)	Community and social connection	Wellness and transformation

Source: LIONS Advisory & Saudi Tourism Authority, ‘International Travelers Survey’, December 2025

“The biggest shift is that people are travelling before they travel: The first journey is virtual, the second is physical. The next wave of tourism will belong to those who master the full journey.”

Joanne Chehab
Head of MENA Global Business Solutions
ByteDance / TikTok



Force 3: Discovery is story-led

Intent forms before planning begins

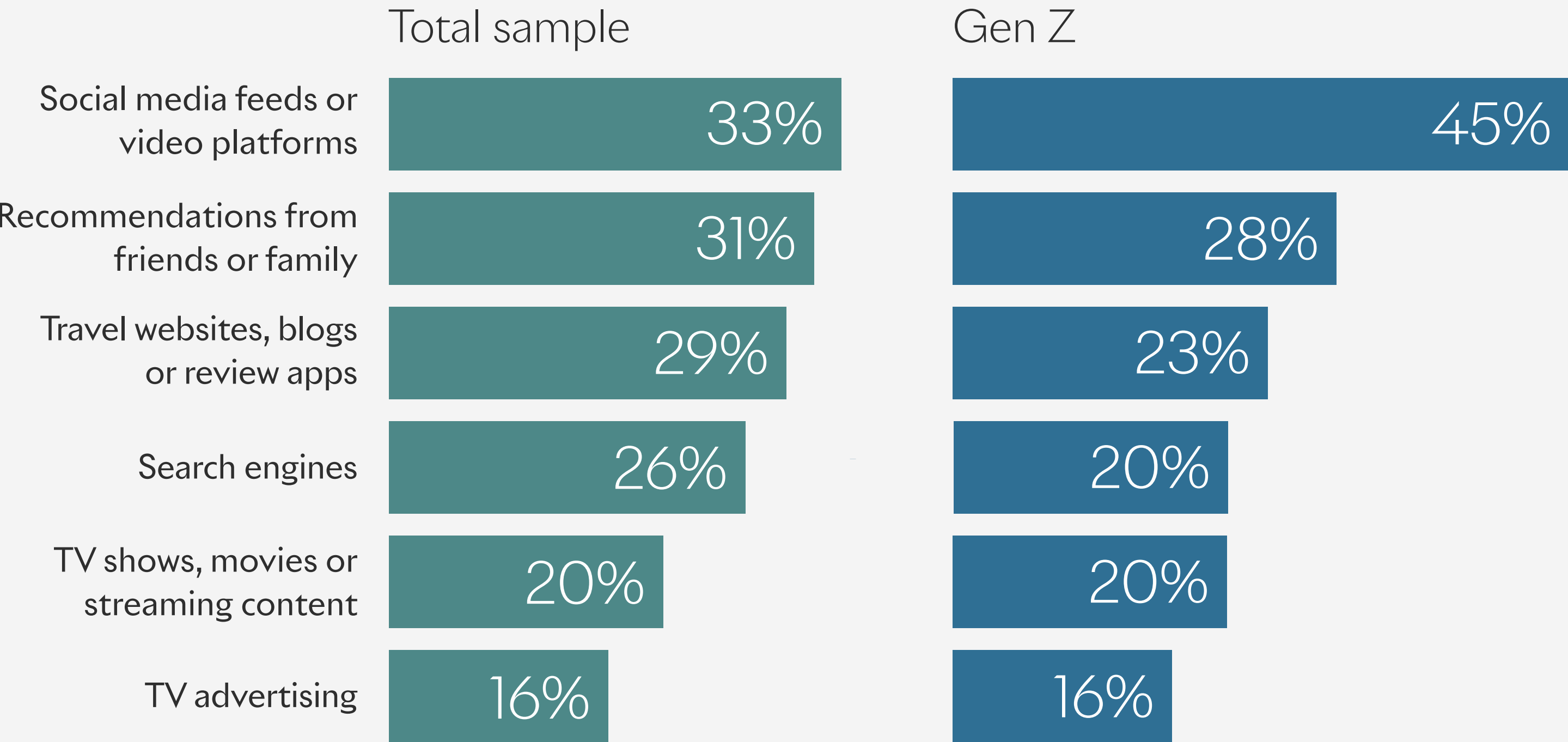
Travel discovery is driven by story-led, perspective-driven content.

Social media is now the leading source of discovery for holiday planning, particularly among younger travelers.

Travel intent now forms before active planning begins, shaped by the content, perspectives and environments they encounter every day.

The influence of social channels extends beyond inspiration: 42% of Gen Z use social platforms to research and plan trips, compared with fewer than 25% who rely on search engines.

Where travelers find inspiration and ideas for travel



Source: LIONS Advisory & Saudi Tourism Authority, 'International Travelers Survey', December 2025.

“More and more journeys begin with a concert ticket, a film location or a dish discovered online. Inspiration and booking now sit side by side. The destinations that connect their stories and experiences to the passions that inspire people will be best placed to shape the next generation of travel.”

Jane Sun
CEO
Trip.com Group



Force 4: Trust is fragmenting

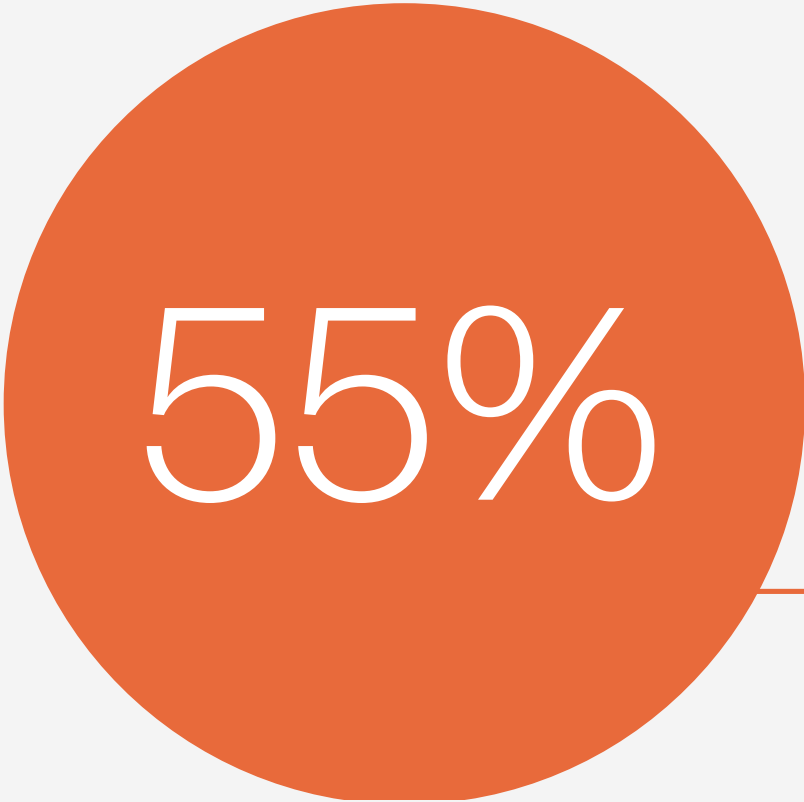
No single source owns trust

Travelers use multiple sources like reviews, creators, communities, AI tools and official channels before committing to travel decisions.

Despite an abundance of information and new tools, more than half of travelers still struggle to identify trustworthy information when travel planning.

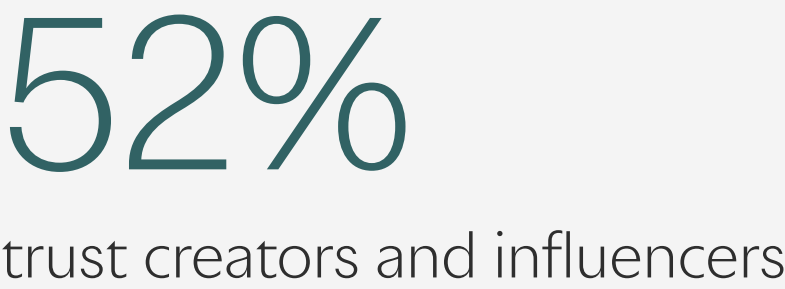
While travelers adopt emerging sources like social platforms and AI tools, they still place strong trust in familiar sources such as friends and family, tourism websites and review platforms.

As discovery fragments, travelers validate decisions by collecting multiple signals rather than relying on any single source.



of travelers agree that it's **difficult to find trustworthy information** when travel planning

Leading discovery sources



Growing influence among travelers 18-44

Leading validation sources



Primary sources for decision validation among travelers 18-44

Source: LIONS Advisory & Saudi Tourism Authority, 'International Travelers Survey', December 2025.

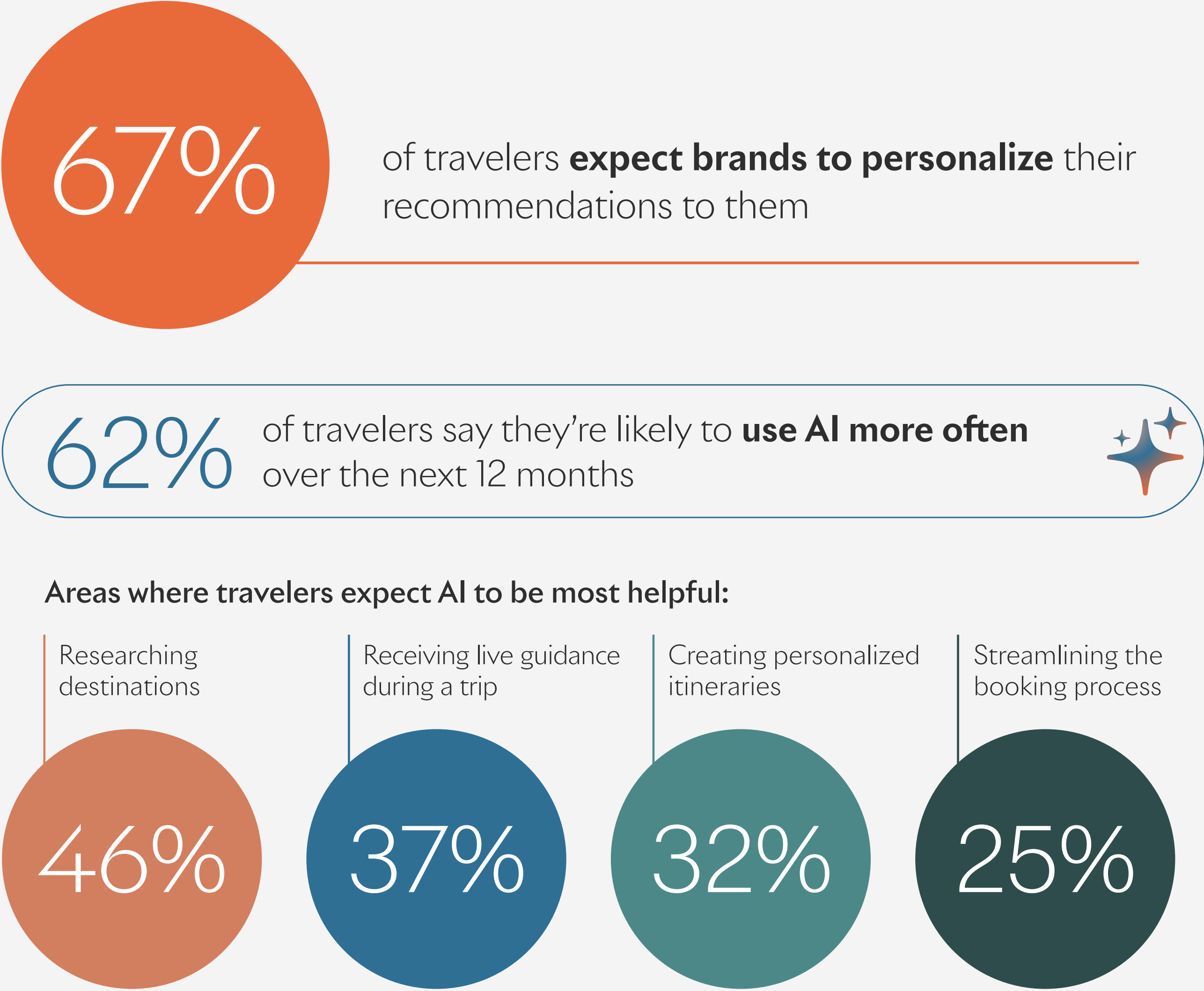
Force 5: The customer journey has been disrupted by AI

AI is reshaping expectations

Travelers expect journeys to feel personalized, intuitive and connected.

AI disruption has already reshaped the travel landscape. More than half of travelers (55%) report using AI in holiday planning, rising to more than three-quarters of Gen Z travelers. Consumers expect to use it across the travel journey, from planning to in-trip guidance.

With access to such personalized tools, consumers expect travel experiences to feel personalized, intuitive and connected. According to our research, 67% expect personalization in their brand communications.



Source: LIONS Advisory & Saudi Tourism Authority, 'International Travelers Survey', December 2025.

“The biggest challenge going forward will be AI. Destinations will need to differentiate themselves as much as possible if they want AI to recommend them.”



Gonzalo Brujó
CEO and Global Chairman
Interbrand

“Social media has changed the game so drastically, it’s left official tourism advertising behind. The sector needs to lift its game.”



David Droga
Vice Chair
Accenture

Tourism marketing must evolve with these forces

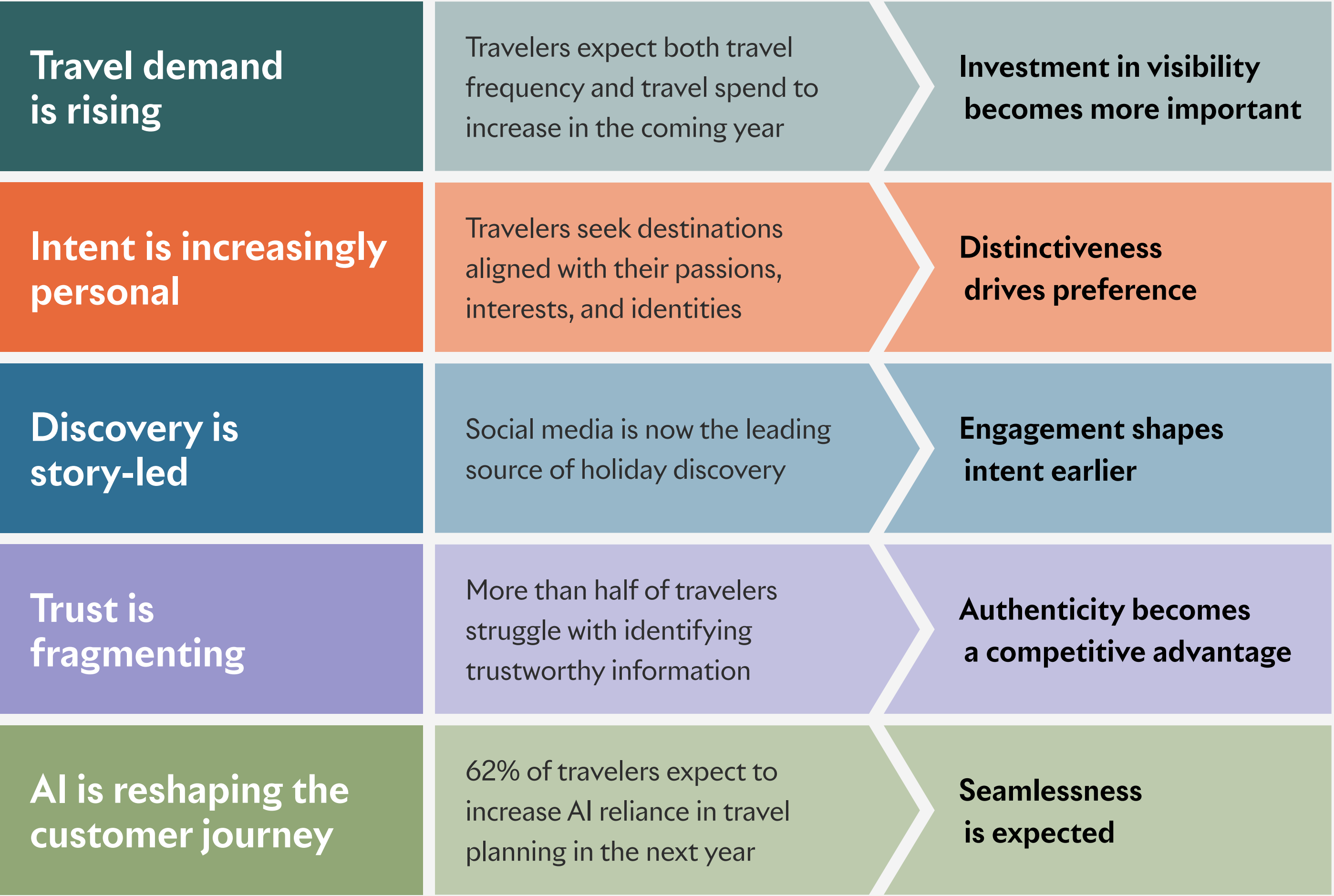
The next era of tourism growth will belong to brands that read these signals early and adapt to meet evolving consumer needs.

The travel market may be growing, but so is its complexity and competition.

Travelers are discovering destinations earlier, through more fragmented sources, with higher expectations for relevance, trust and experience.

These shifts are creating a gap between growing traveler demand and the industry’s ability to capture it.

Five forces reshaping travel and tourism



“Tourism sits at the heart of the experience economy. People aren’t looking for just ‘trips’; they’re seeking stories, memories, and meaning. For destinations to win the hearts (and wallets) of modern travelers, marketing communications must evolve toward immersive experiences and emotional resonance.”

Ageel Alshaibani
CEO
Saudi Tourism Authority



2 IDEAS that travel – A new playbook for growth

Tourism brands have substantial opportunity to convert rising demand into growth, but marketing has not evolved fast enough to match traveler behavior.

This chapter explores five drivers tourism brands can use to unlock effective growth.



Tourism brands need a new playbook for growth

The forces reshaping traveler behavior are changing how tourism brands capture attention, build preference and sustain growth across social platforms, creator ecosystems, AI-powered discovery and lived experiences.

For tourism brands, future growth will depend on how effectively they build visibility, create distinction, earn trust, sustain engagement, and deliver connected experiences across the customer journey.

The **IDEAS** framework brings these principles together into a practical lens for responding to the changing realities of modern tourism marketing.

Five drivers of effectiveness for modern tourism brands

I	Investment	Sustained brand presence to capture demand
D	Distinctiveness	A clear and memorable identity that aligns with traveler motivations
E	Engagement	Creative storytelling that earns attention and drives emotional connection
A	Authenticity	Experiences and perspectives that feel credible, lived, and trustworthy
S	Seamlessness	Connected experiences that balance intelligent automation with human delivery

“Global travel is more resilient than ever, creating an opportunity to share the benefits of growth more broadly across destinations and communities. Travelers are increasingly looking beyond the familiar to discover new destinations and experiences. By sharing insights and deepening collaboration, tourism boards and travel platforms can help translate strong demand into more balanced growth, opening up opportunities for more destinations and communities to benefit from tourism.”

Jane Sun
CEO
Trip.com Group



Investment: Sustained brand presence to capture demand

Demand is growing faster than visibility

Future growth depends on remaining visible as competition intensifies.

The COVID-19 pandemic caused tourism media investment to collapse, falling from \$20.8 billion in 2019 to \$13 billion in 2020.

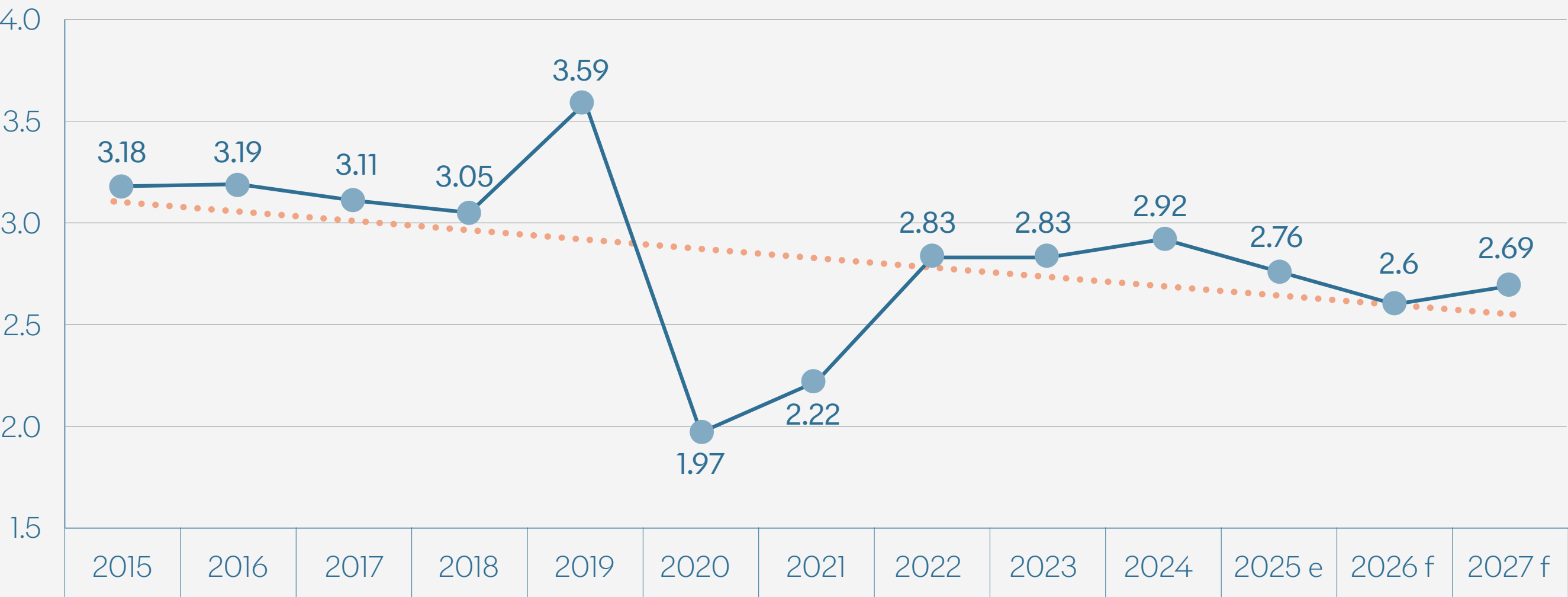
Although spend has since rebounded to an estimated \$32.4 billion in 2025, category share of voice remains below pre-pandemic levels. This means tourism brands are competing for growing demand with comparatively less visibility.

This matters because excess share of voice (ESOV), when a brand’s share of voice exceeds its market share, is strongly linked to long-term growth.

Brands that maintain visibility are more likely to strengthen future preference and capture growth as travel demand expands.

An \$11 billion marketing investment gap

Global travel & transport spend as % of total global ad spend



To restore category SOV to 3%, forecasts show the industry would need to invest \$43.4 billion in 2027.
That’s an increase of \$11 billion – or more than a third – in just two years.
The implication is not simply that brands need to spend more, but that visibility is harder to maintain as travel demand expands and competition intensifies.

Source: WARC & Nielsen

Investment: Sustained brand presence to capture demand

Discovery has moved, investment hasn't

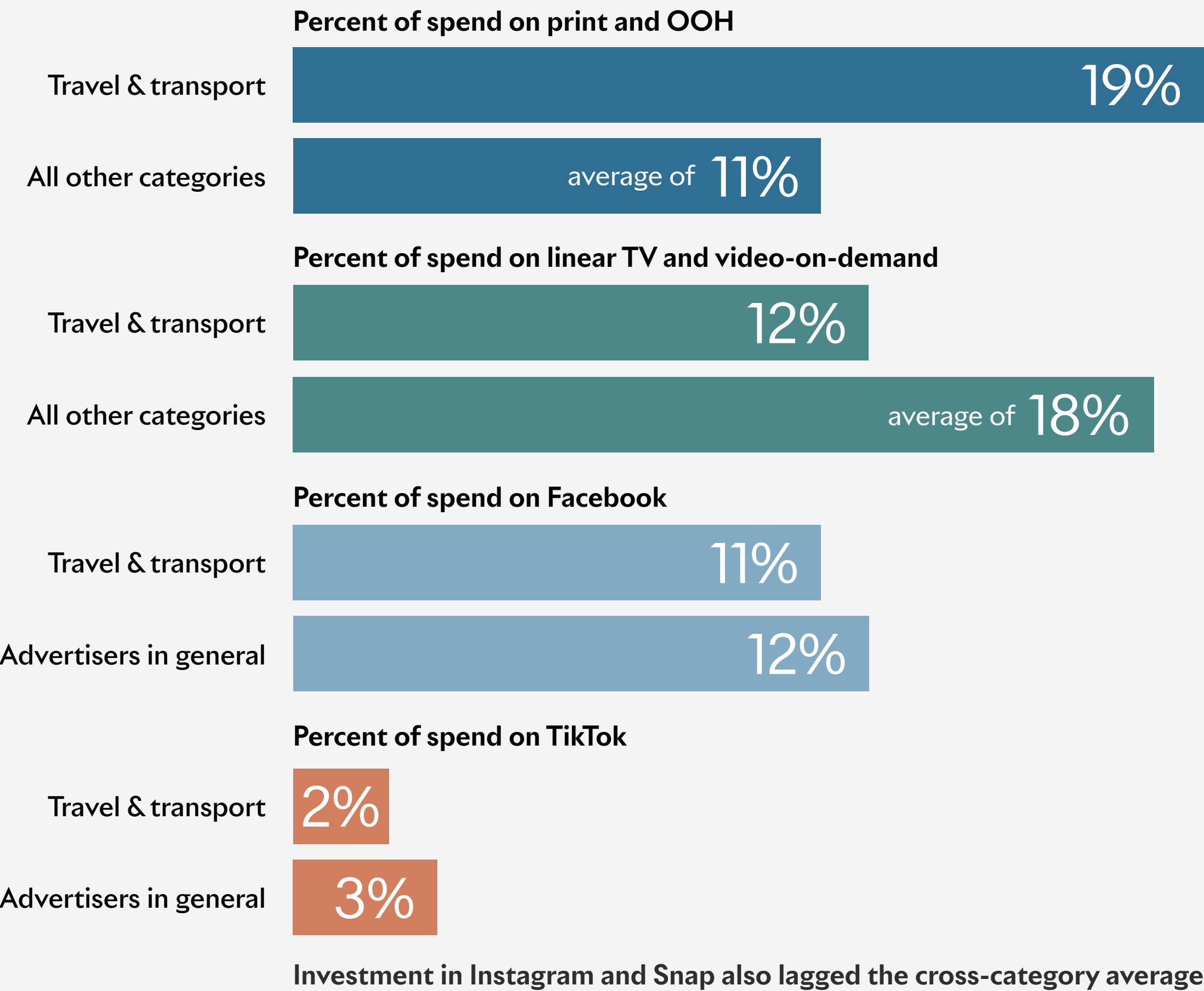
Travel intent now primarily forms in environments where many tourism brands remain underrepresented.

Building brand visibility is not only a question of scale, but of allocation.

WARC Media benchmarks suggest that despite tourism discovery channels evolving, media spend has not followed suit. Compared with other sectors, tourism under-indexes on investment in social, creator, video and entertainment-led environments.

As discovery becomes more fragmented and story-led, tourism brands need investment strategies that build visibility in the environments where intent is shaped.

Category media spend in 2025



All other categories analyzed: Alcoholic Drinks, Automotive, Business & Industrial, Clothing & Accessories, Financial Services, Food, Household & Domestic, Leisure & Entertainment, Media & Publishing, Nicotine, Government & Non-Profit, Pharma & Healthcare, Politics, Retail, Soft Drinks, Technology & Electronics, Telecoms & Utilities, Toiletries & Cosmetics, Travel & Transport

Investment: Sustained brand presence to capture demand

Investment

The gap

Rising demand only creates growth for brands that remain top of mind when travel choices are being formed.

Tourism's investment challenge is not simply to spend more. It is to make smarter choices about where visibility is needed, where demand is most likely to grow, and where spend can work hardest.

The step forward

Build brand visibility

Sustain a consistent brand presence as competition for travel demand intensifies.

Reallocate toward modern discovery

Consider shifting investment toward social, creator, video and entertainment-led environments where travel intent forms.

Balance short- and long-term goals

Balance conversion-focused activity with investment in future brand growth.



“You have to come up with new ways to engage audiences every day. They’re used to very high-quality content on TikTok and Instagram. The algorithm only serves them interesting stuff, so brands have to be equally interesting.”



Caspar Lee
Co-founder and CVO
Influencer.com

“Social selling is still under-utilized... we’re in an age where selling is in the hands of the people, but they can’t sell if you don’t give them the connectivity they need.”



Tony Fernandes
CEO, Capital A
Co-Founder, AirAsia

Distinctiveness: A clear and memorable identity that aligns with traveler motivations

The sea of sameness

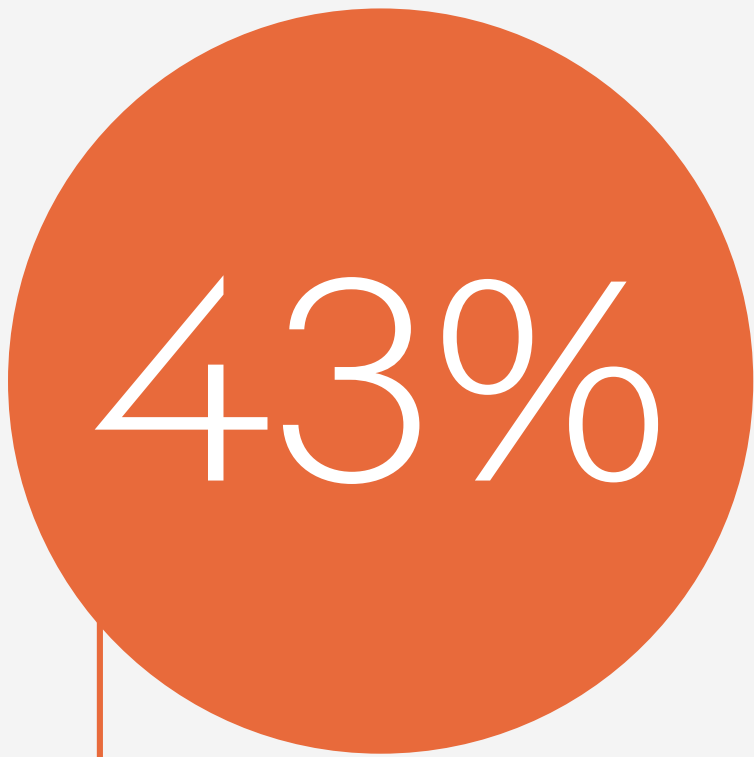
As travelers seek destinations that reflect their interests, values and identities, broad positioning becomes less effective.

Our research found that 60% of travelers agree that the travel ads they see are similar, and 43% agree that they find it hard to distinguish between brands in the sector. This signals significant headroom for travel brands to sharpen their distinctiveness and build stronger ownership of their messaging.

To win share in travel and tourism requires brands to achieve clear and memorable branding that cuts through a crowded sector.



of respondents agreed that **many travel ads look similar to one another**



of respondents agreed that **they find it hard to distinguish between different travel brands**

These perceptions were consistent across age groups and geographies, suggesting an industry-wide need for tourism brands to stand out clearly, create strong salience, and drive preference among consumers.

Source: LIONS Advisory & Saudi Tourism Authority, ‘International Travelers Survey’, December 2025

Distinctiveness: A clear and memorable identity that aligns with traveler motivations

Distinctiveness

The gap

As travel decisions become more personal, broad positioning and interchangeable messaging become easier to ignore.

The strongest tourism brands build clear associations around specific experiences, perspectives and emotional territories.

Clear identities, recognizable assets, and consistent messaging make brands easier to remember, recognize, and choose.

The step forward

Clarify what the brand is known for

Move beyond broad promises toward a sharper point of view rooted in culture, character or experience.

Build recognizable brand signals

Leverage distinctive assets, language and identity to help make the brand easier to recognize and recall.

Apply the identity consistently

Commit to consistency across campaigns, creators and channels to strengthen memory over time.



Engagement: Creative storytelling that earns attention and drives emotional connection

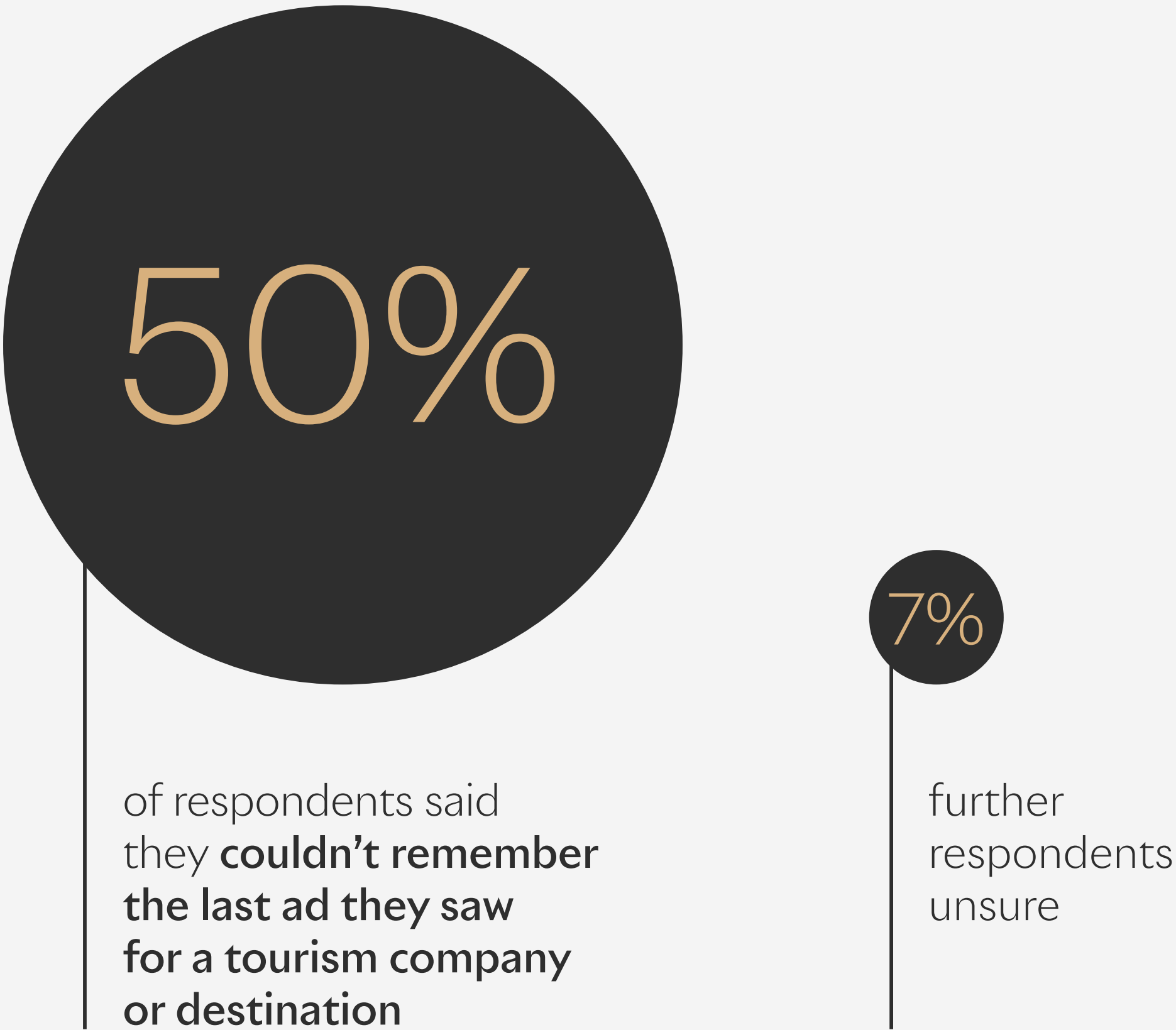
The race for attention

In a media environment shaped by creators, entertainment and algorithmic feeds, tourism brands are competing with more content than ever for attention and interest.

According to our study, nearly half of travelers cannot recall the last tourism advertisement they saw.

Despite being one of the world’s richest emotional categories, much tourism marketing still relies on passive or functional communication approaches that struggle to compete in social, creator, and entertainment-driven environments.

As discovery shifts further into social, creator and entertainment environments, this creates growing pressure for tourism brands to produce work that audiences actively remember, engage with and share.



Source: LIONS Advisory & Saudi Tourism Authority, ‘International Travelers Survey’, December 2025.

Engagement: Creative storytelling that earns attention and drives emotional connection

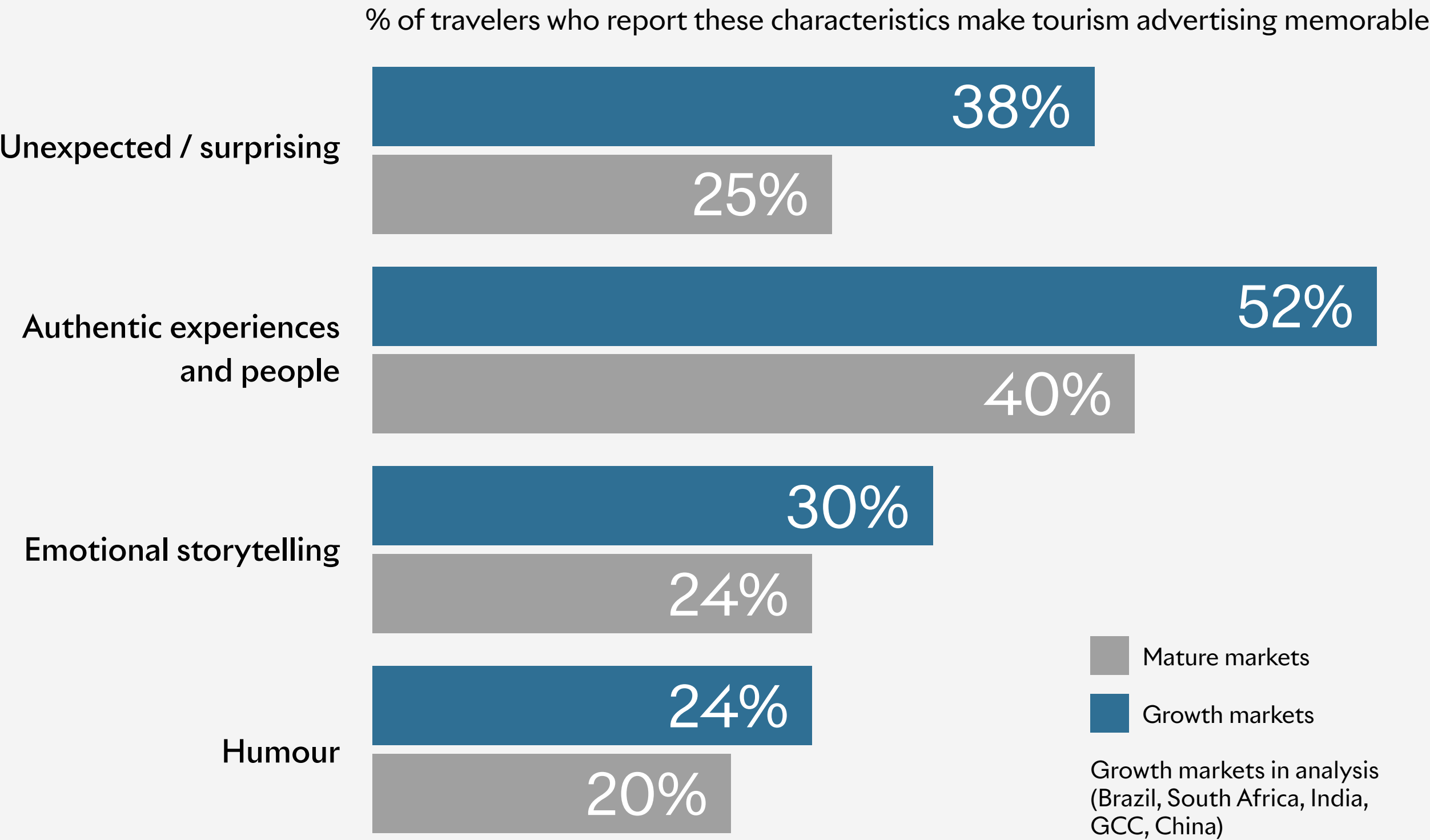
Future travelers expect richer storytelling

The strongest tourism creative creates emotional connection through perspective, emotion, and storytelling.

Our research shows that growth markets, the markets with the highest intent to travel, over-index on creative attributes. They prefer creative that showcases authentic experiences, unexpected creative approaches, and emotional storytelling, signaling a shift away from conventional destination marketing toward work that feels more immersive and lived-in.

For tourism brands, more effective creative will increasingly depend on storytelling that earns attention through emotion, authenticity and cultural resonance.

Emotional and authentic storytelling resonates more strongly in growth markets



Source: LIONS Advisory & Saudi Tourism Authority, 'International Travelers Survey', December 2025.

Engagement: Creative storytelling that earns attention and drives emotional connection

Engagement

The gap

Discovery is shifting toward social content, creators and entertainment platforms. Tourism brands face growing pressure to create stories and experiences audiences want to watch, share and talk about.

More effective tourism creative does not simply communicate destination features – it features engaging, emotionally resonant storytelling that travelers want to watch, remember, and share. 0

The step forward

- Move beyond place to perspective**
Focus less on destination features alone and more on experiences, emotion, and lived perspective.
- Generate buzz, not a broadcast**
Create work audiences actively want to engage with, share and talk about, not just passively consume.
- Create scalable creative platforms**
Develop flexible ideas and storytelling systems that can evolve across campaigns, creators and channels.



Authenticity: Experiences and perspectives that feel credible, lived and trustworthy

Experience should create advantage

Despite being an experience-driven category, tourism hasn’t capitalized on experience as a competitive advantage.

The tourism sector performs closer to average against other sectors when it comes to experience. According to KPMG’s Customer Experience Excellence research, the sector achieved a CEE score of 7.42 out of 10.

In a world shaped by reviews, creators and community recommendation, every travel experience becomes a driver of advocacy, reputation, and future discovery.

Travel & hotels ranks 7th out of 13 sectors for customer experience

1	Healthcare
2	Non-grocery retail
3	Grocery retail
4	Banking
5	Insurance
6	Restaurants
7	Travel & hotels
8	Entertainment & leisure
9	Automotive
10	Telecommunications
11	Logistics
12	Utilities
13	Public sector

Source: KPMG. Global Customer Experience Excellence 2025–2026.

Authenticity: Experiences and perspectives that feel credible, lived and trustworthy

Brand promises need to match lived experience

Destination perception is shaped as much by reviews, creator content and lived experiences as by official brand communications.

Edelman’s 2025 Trust Barometer found that alongside quality and value, the most important drivers of purchase consideration are trust, service, and reputation. This reinforces the growing commercial importance of brands building credibility through authenticity.

For tourism brands, authenticity depends on whether the experiences, perspectives and conversations surrounding the destination reinforce the story the brand tells.

In purchase decisions, consumers weigh trust alongside quality and value

Percent consumers who say when it comes to the brands I buy or use, this is important or a deal breaker



Source: [2025 Edelman Trust Barometer Special Report: Brand Trust, From We to Me.](#)

Authenticity: Experiences and perspectives that feel credible, lived and trustworthy

Authenticity

The gap

Tourism brands need to think beyond communications alone.

Credibility depends on whether traveler experiences, creator perspectives and public conversation reinforce the expectations marketing creates.

The step forward

Align promise with experience

Ensure marketing accurately reflects the destination and experience travelers will encounter.

Influence reputation beyond owned channels

Partner with creators, institutions, and communities that shape how destinations are experienced and discussed.

Treat trust as a growth driver

Partner with creators, institutions, and communities that shape how destinations are experienced and discussed.



“We still suffer from wanting to look pretty and show a perfect world... If we’re honest, a lot of the time you could swap the logos on ads and customers wouldn’t even notice.”



Martin Nydegger
CEO
Switzerland Tourism

“The question of trust is foundational. If travelers can’t trust what they see, the entire digital travel funnel – from inspiration to booking – collapses.”



Christie Travers-Smith
Director of EMEA Strategic Partnerships
Google

Seamlessness: Connected experiences that balance intelligent automation with human delivery

Balancing audience and agent

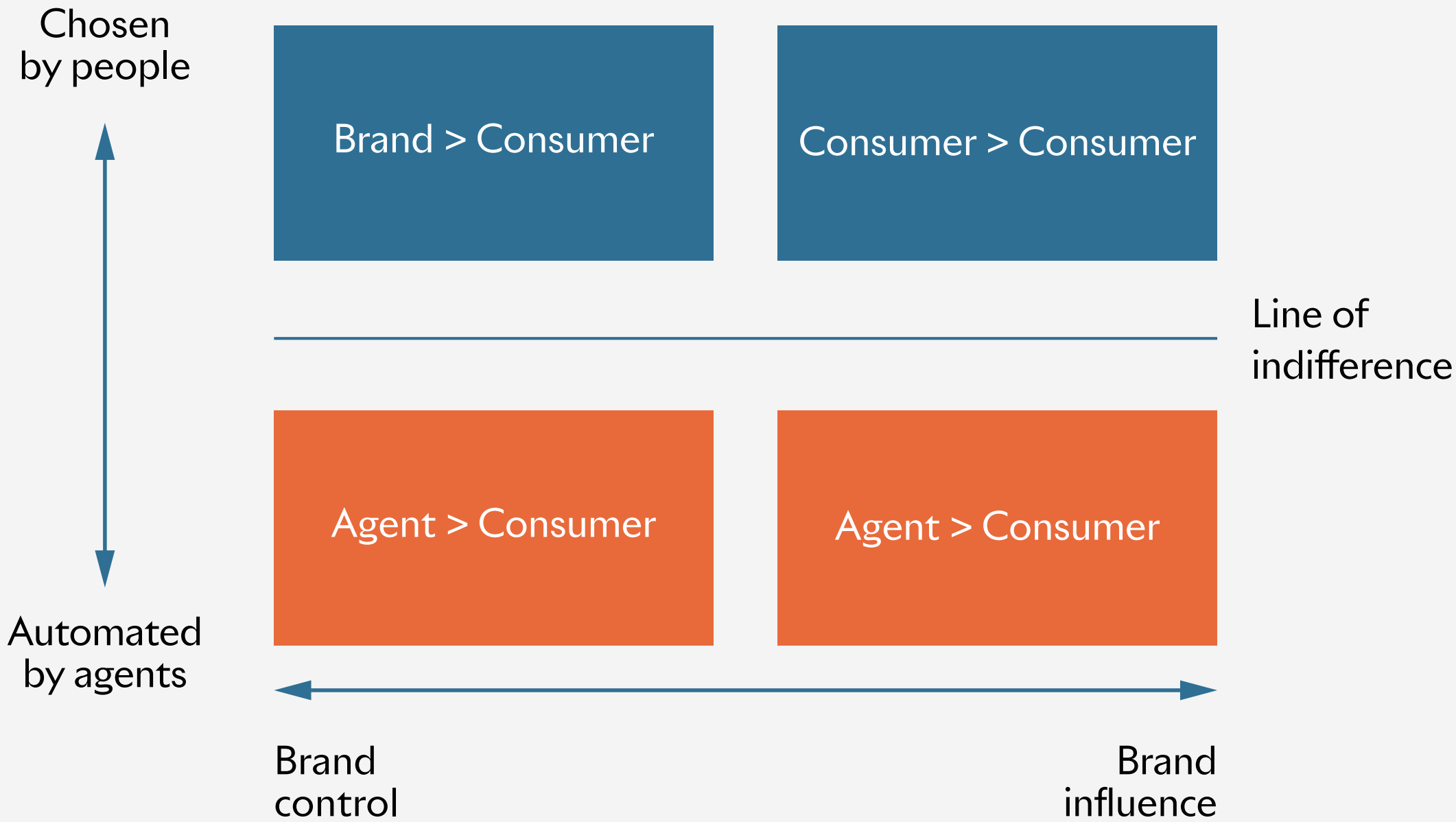
As AI assistants become more embedded into search, planning and booking journeys, tourism brands will need to influence two audiences simultaneously: travelers and the technology they use.

In traditional travel marketing, discovery was largely shaped between brand and consumer through advertising, or consumer to consumer through reviews and word of mouth. In the new journey, AI-powered assistants are beginning to filter options, summarize recommendations and curate itineraries on consumers’ behalf.

For tourism brands, this raises the importance of building both emotional relevance with people and computational clarity for AI systems, ensuring brands are not only memorable to travelers, but easy for AI systems to recognize, evaluate and recommend.

The four modes of modern marketing

How relationships change in an AI-driven world



Future-ready tourism brands must operate across all four modes

Source: WARC, AI causing structural shifts, and what marketers can do about it, December 2025.

Seamlessness: Connected experiences that balance intelligent automation with human delivery

AI rewards strong brands

AI agent recommendations are primarily driven by the fundamentals of brand building.

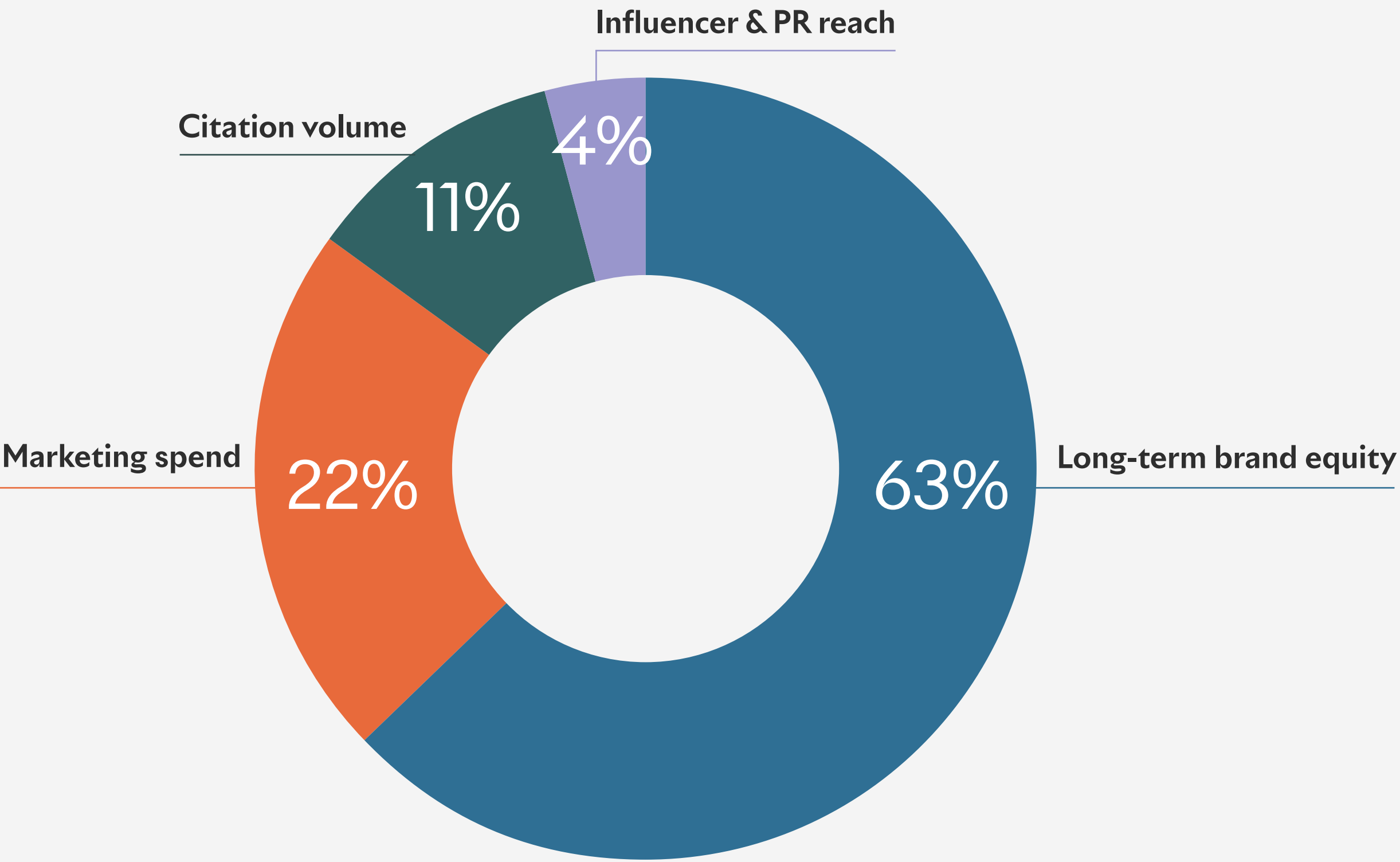
Research from digital agency Charlie Oscar across 30 brands and six categories shows that long-term brand equity accounts for almost two-thirds of Large Language Model (LLM) visibility.

Current marketing activity accounts for another 22%, while citation volume contributes just 11%.

For tourism brands, this suggests AI visibility is shaped less by isolated optimization tactics and more by the strength, consistency and recognizability of the brand across the wider ecosystem.

Brand building leads to LLM visibility

Two-thirds comes from long-term brand equity



Source: WARC, What really drives LLM visibility, and what brands can do about it, March 2026.

Seamlessness: Connected experiences that balance intelligent automation with human delivery

Five ways tourism brands can increase AI visibility

 Build trusted and distinctive brand signals	 Strengthen traveler advocacy and reviews	 Increase presence across trusted travel ecosystems	 Create culturally resonant, shareable experiences	 Optimize information for machine readability
As AI systems prioritize trusted and recognizable sources, tourism brands should invest in consistent brand positioning, strong reputation signals and long-term distinctiveness that machines can easily associate with credibility and quality.	AI assistants frequently surface reviews, ratings and traveler commentary when recommending destinations, hotels and experiences. Encouraging authentic customer reviews and positive traveler sentiment can help increase visibility in AI-mediated discovery.	Editorial coverage, creator partnerships, destination guides and third-party travel platforms all contribute to the signals AI systems use to evaluate relevance and authority. Brands should build broad visibility across credible travel environments.	Experiences that generate conversation, social sharing and creator storytelling are more likely to produce the digital signals that influence AI recommendations. Memorable moments function as discoverability infrastructure.	As AI agents help travelers compare and evaluate options, tourism brands should ensure core information – including pricing, availability, amenities, itineraries and reviews – is structured, accurate and consistently represented across platforms.

Seamlessness: Connected experiences that balance intelligent automation with human delivery

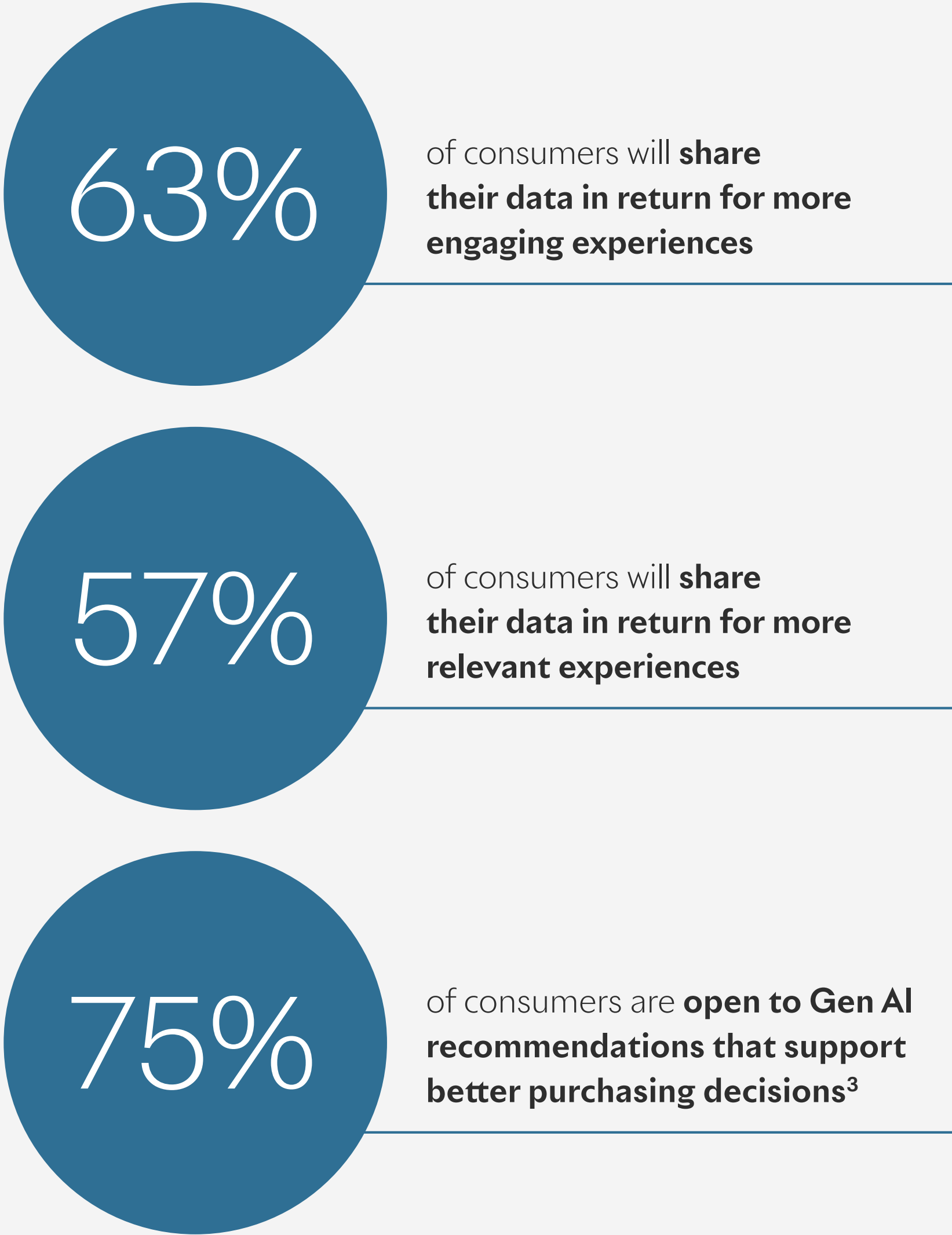
CX is a value exchange

Consumers are willing to exchange data for better experiences.

A 2024 study from Jack Morton found that 63% of consumers are willing to share data for more engaging experiences, while 57% would do so for experiences that feel more relevant.

For tourism brands, this raises the importance of designing connected experiences that combine intelligent automation with human reassurance. The opportunity is not simply to automate the journey, but to create experiences that feel seamless, anticipatory and emotionally intuitive across every touchpoint.

In an increasingly AI-mediated landscape, brands that can reduce friction while strengthening trust, personalization and service quality will be better positioned to influence both traveler satisfaction and future recommendation systems.



Source: WARC, What really drives LLM visibility, and what brands can do about it, March 2026.

Seamlessness: Connected experiences that balance intelligent automation with human delivery

Seamlessness

The gap

As AI influences how travel is discovered, planned and experienced, tourism brands need to create journeys that feel connected across both digital and human touchpoints.

The strongest brands will use technology not simply to automate interactions, but to improve discoverability, reduce friction and deliver more relevant customer experiences.

The step forward

Embrace the principles of brand building to drive LLM recommendations
Build consistent, recognizable brand signals across channels, content and experiences to strengthen AI visibility and recommendation potential.

Use data and automation to create customer value
Apply personalization and connected technologies in ways that feel genuinely useful, intuitive and relevant throughout the journey.

Balance intelligent automation with human delivery
Use technology to reduce friction and enhance service, while preserving the emotional connection and human experience travelers value most.



“It’s tough being a brand owner now. Expectations are very high. People want the lowest cost. They want the best value. And they still expect perfection.”

“AI will make everything much more efficient, but the mistake would be to think that marketing decisions are now just numbers-driven. Inspiration, creativity, and real empathy for travelers still matter. It’s the combination with data that gets results.”



Tony Fernandes
CEO, Capital A
Co-Founder, AirAsia



David Droga
Vice Chair
Accenture

Tourism marketing is evolving from destination promotion to experience systems

Historically, tourism marketing focused primarily on visibility, consideration, and conversion. But as discovery fragments, expectations rise and AI reshapes the customer journey, competitive advantage depends on how effectively brands connect every part of the experience ecosystem.

The strongest tourism brands will not simply market destinations more efficiently. They will build integrated systems of brand presence, storytelling, trust and customer experience that reinforce one another across the entire journey.

In this environment, effectiveness is no longer defined by individual campaigns or channels alone, but by how consistently the brand experience compounds over time.



Each part of the matrix is essential to increasing a brand’s Experience Equity, driving recommendation by AI models and agents, and making a destination feel irresistible to travellers.

3 IDEAS in practice

The next era of tourism growth will be shaped by brands that adapt faster to changing traveler expectations.

This chapter showcases tourism and travel brands applying the principles of modern marketing effectiveness.



Investment: Sustained brand presence to capture demand

Airbnb: Investing in fame to drive long-term growth

A tech company built on search and performance tactics, in recent years Airbnb has shifted its priorities to build long-term brand fame and emotional relevance.

This priority is evidenced in their 2024 Airbnb Icons campaign. Building on pop-culture partnerships including Barbie’s DreamHouse and Shrek’s Swamp, the company launched a series of immersive experiences inspired by music, film, television, sports and entertainment fandoms.

The campaign contributed to Airbnb’s most successful Q2 on record, generating 125.1 million nights and experiences booked alongside measurable lifts in global awareness, sentiment and app installs.



1.2bn	95m	550k	48k
Organic social impressions	Listing page views	Booking requests	Global press hits

Distinctiveness: A clear and memorable identity that aligns with traveler motivations

Tourism Australia: Building fame through distinctive assets

Tourism Australia launched Come and Say G'Day to accelerate post-pandemic tourism recovery despite limited share of voice and intense global competition.

Rather than relying on generic destination advertising, the campaign launched in 2022 to shine a light on distinctive Australian cultural assets, from the phrase “G'day” to iconic locations and the animated kangaroo character Ruby.

By combining blockbuster-style entertainment, broad-reach media and recognizable cultural cues, the campaign helped Australia stand out in one of the world’s most competitive tourism categories.



+36%	+20%	+\$1,361	23% faster
Increase in travel consideration	Visitor numbers vs. forecast	Increase in spend per visitor	US tourism recovery vs. Canada

“What’s unique about your destination, your culture? Get into that uniqueness and how it connects to what people are looking for in their lives. That’s the way to create something memorable.”



David Droga
Vice Chair
Accenture

“Creativity is critical in ensuring brands differentiate themselves. Storytelling needs to be very selective and very, very clear. Trust is about transparency and clarity, so brands need to be specific. They can’t be everything for everyone.”



Gonzalo Brujó
CEO and Global Chairman
Interbrand

Engagement: Creative storytelling that earns attention and drives emotional connection

Visit Sweden: Turning destination marketing into entertainment

Visit Sweden challenged traditional tourism advertising by transforming Swedish folklore into an immersive entertainment experience.

Facing competition from visually dramatic destinations like Norway and Iceland, the tourism board needed a new way to make Sweden’s quieter landscapes feel distinctive and emotionally compelling. Instead of relying on scenic imagery alone, the 2022 campaign, Spellbound by Sweden, used audio storytelling, geo-located experiences and narratives inspired by local myths and folklore to create a more emotionally immersive way of experiencing the destination.

The campaign tapped into broader cultural trends around mysticism, horror and immersive entertainment, helping Visit Sweden extend beyond traditional tourism advertising into culture, entertainment and social conversation.



1.3bn	+16%	+9%	+10.9%
People reached globally	Destination awareness	Increase in travel intent	Increase in international guest nights

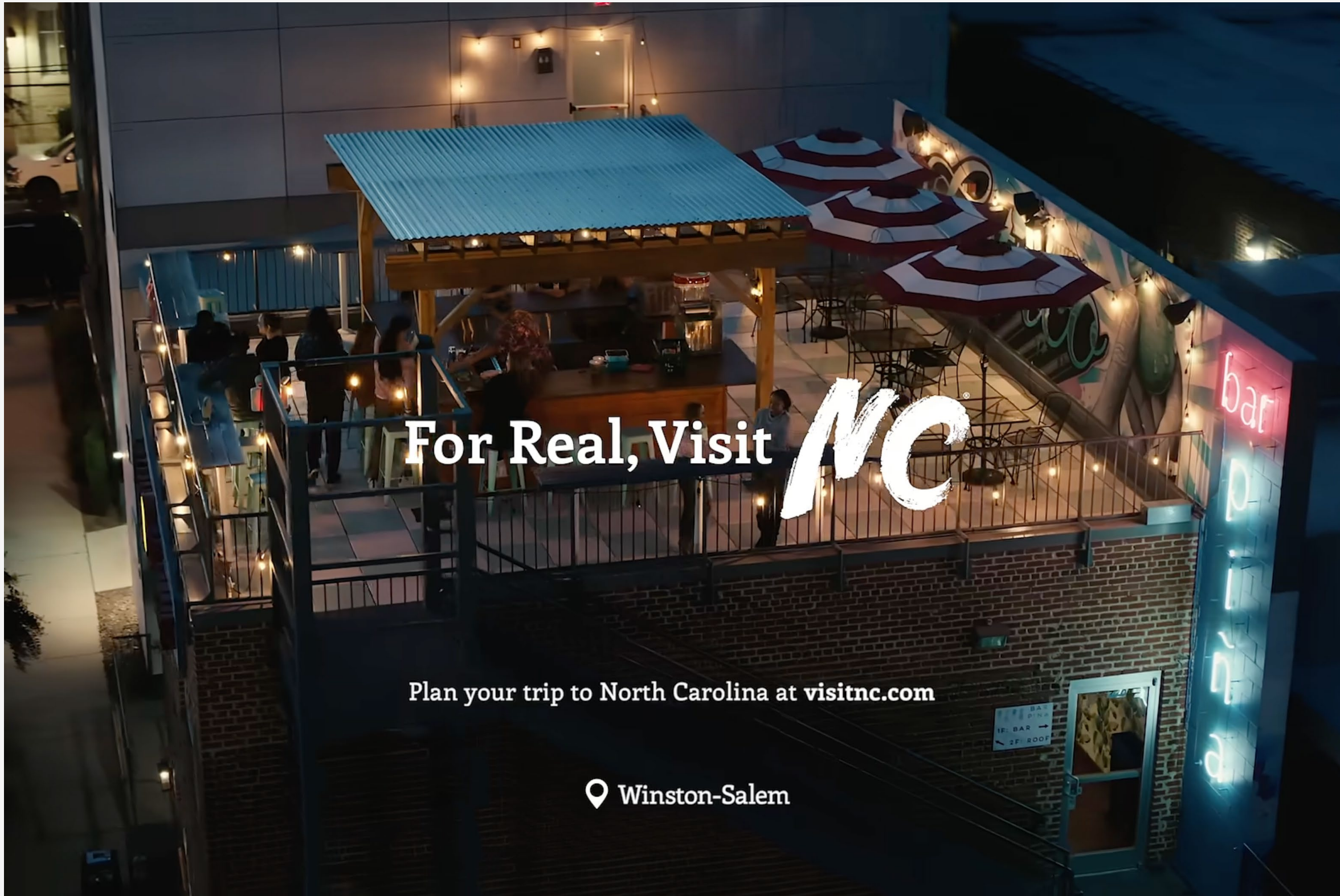
Authenticity: Experiences and perspectives that feel credible, lived and trustworthy

Visit North Carolina “For Real”

In the post-pandemic travel boom in 2023, Visit North Carolina launched “For Real” to differentiate itself in an increasingly crowded tourism market dominated by larger spending destinations and overly curated travel advertising.

Rather than competing on spend and polished spectacle, the campaign positioned North Carolina as the antidote to artificial tourism, using authentic storytelling, local voices and unfiltered experiences to build a more distinctive emotional identity.

The campaign combined immersive video, micro-influencers and audience-tailored storytelling to showcase North Carolina as a place for genuine connection, discovery and cultural immersion. By leaning into authenticity as a distinctive asset, the state strengthened both emotional relevance and long-term travel consideration.



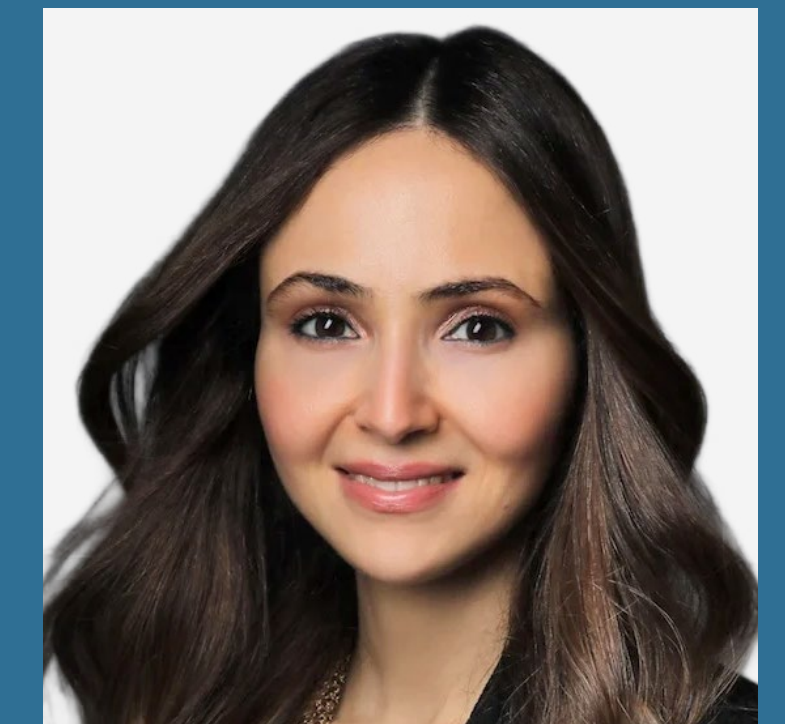
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Most-visited US state ranking	Visitor spending record	Lift in travel intent	ROI in ad-influenced spending

“The opportunity is to shift from a broadcast to a dialogue model. Destinations need to evolve from static identities to living brands... Content should be participatory and include emotions, feelings, experiences from both local people and travellers.”



Miguel Sanz Castedo
CEO
Turespaña

“The industry must shift from promoting places to curating experiences. Travellers today compare moments, not maps. They choose destinations based on how the experience makes them feel.”



Joanne Chehab
Head of MENA Global Business Solutions
ByteDance / TikTok

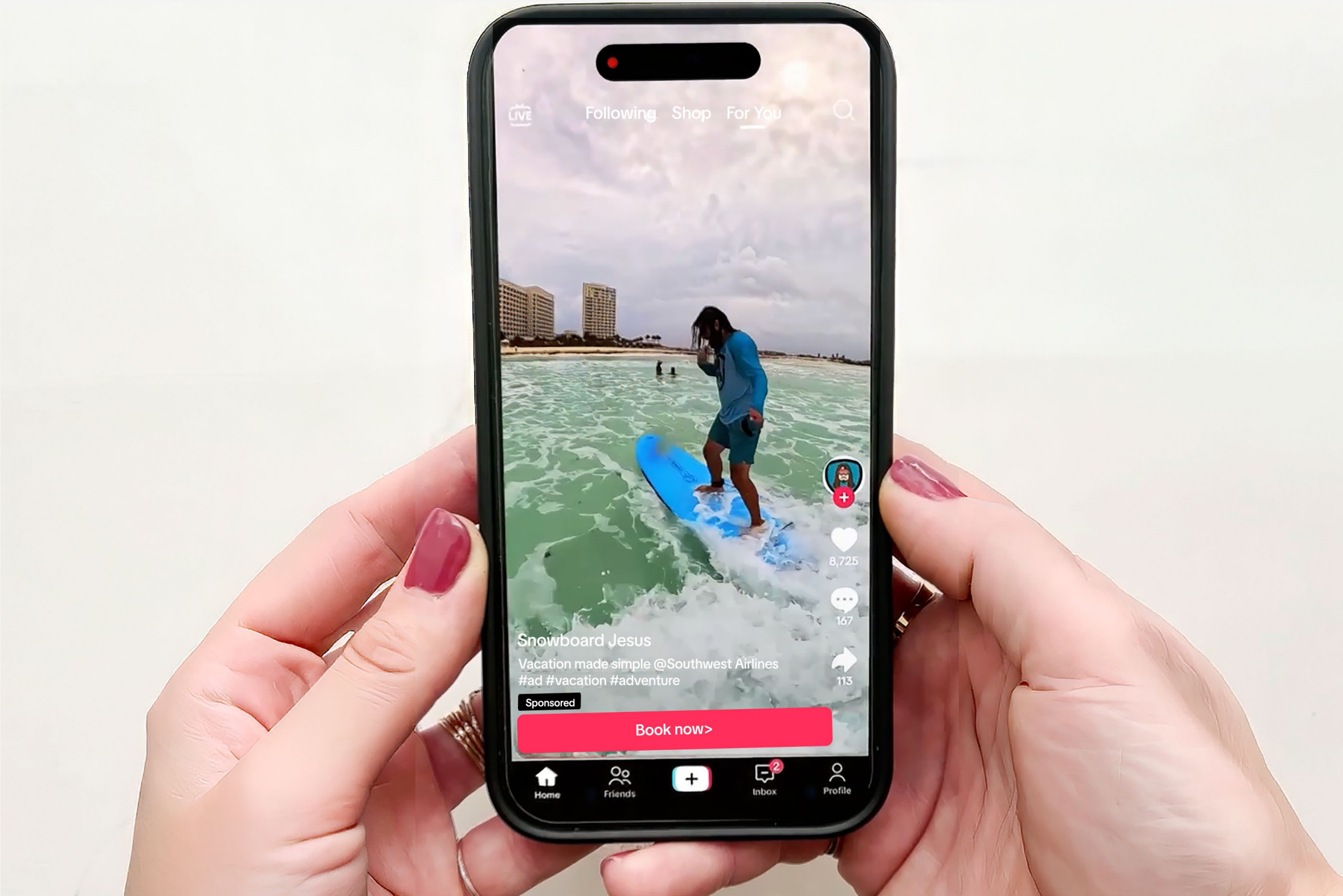
Seamlessness: Connected experiences that balance intelligent automation with human delivery

Southwest: Turning inspiration into booking

Southwest Airlines reimagined travel booking for Gen Z by turning TikTok into a fully shoppable booking platform. Recognizing that younger travelers use social platforms for travel inspiration rather than traditional search engines, the airline identified an opportunity to collapse the gap between inspiration and action.

Launched in 2024, Shoppable Flights, became the first initiative to enable the purchase of non-physical products directly through TikTok, requiring the platform to develop entirely new back-end technology.

Rather than relying on traditional travel advertising, Southwest partnered with creators across music, animation, food and lifestyle content to showcase travel inspiration in ways that felt native to the platform and authentic to Gen Z audiences. Creators acted as virtual travel agents, demonstrating how users could move seamlessly from discovery to booking without leaving the app.



29.9m	270k	5x higher	1.03%
Total views	Total engagements	Shop rate vs. benchmark Southwest ads	Engagement rate achieved

“The next era of travel goes beyond moving from point A to point B. By 2030, the brands that win won’t rely on a single strength; they’ll blend creativity, technology, and purpose at every touchpoint.”



Ageel Alshaibani
CEO
Saudi Tourism Authority

“It’s about creating deeper emotional bonds. Run campaigns that make people feel something. Then, once people experience your promise first-hand, they’ll become advocates for your destination.”



Miguel Sanz Castedo
CEO
Turespaña

Key findings

The evolution	Traditional tourism marketing must adapt Generic positioning, passive messaging, and disconnected customer experiences are becoming less effective in a more fragmented, socially-driven, AI-disrupted landscape.				
Five forces reshaping travel demand	Rising demand Competition for future preference intensifies	More personal intent Broad positioning becomes less effective	Story-led discovery Intent forms before active planning begins	Fragmented trust Validation increasingly happens across touchpoints	AI-mediated journeys Expectations for personalization and connected experiences are rising
The new tourism marketing model	Strong tourism brands will not simply market destinations more effectively They will build integrated systems of visibility, storytelling, trust, and customer experience that reinforce each other across the journey.				
The IDEAS playbook	Investment Build visibility and salience	Distinctiveness Build clear and memorable brand associations	Engagement Earn attention through storytelling and emotional connection	Authenticity Build trust through credible experiences and perspectives	Seamlessness Deliver connected experiences across the customer journey

Final takeaways

Incumbents still control scale, but must compete for relevance

The next generation of incumbents will not simply distribute travel demand, they will shape it earlier

Who	Their advantage	Future imperatives			
• Destination marketing organisations • Airlines • Hotel groups • Online travel agencies • Cruise brands	• Infrastructure and distribution • Existing trust and visibility • Large customer ecosystems	Compete for attention, not just bookings Future demand is shaped long before travelers enter the booking funnel.	Move from visibility to cultural relevance Generic destination marketing is becoming easier to ignore in algorithmic environments.	Turn fragmented touchpoints into connected systems Winning brands will integrate storytelling, creators, AI, media and experience into one seamless journey.	Build salience before demand peaks Brands that remain consistently present will capture disproportionate future growth.

Final takeaways

Disruptors are reshaping discovery, intent and influence

The most influential disruptors will shape how travel decisions are made, not just where they happen

Who	Their advantage	Future imperatives			
• Creators • AI platforms • Social channels • Travel tech challengers	• Control of attention • Algorithmic personalization • Cultural relevance and speed	Turn attention into lasting trust Reach alone is fragile. Future winners will convert visibility into credibility and advocacy.	Shape culture, not just algorithms The strongest brands will build communities and participation, not simply win platform trends.	Blend intelligent automation with human meaning Technology may simplify travel, but emotion and authenticity still drive choice.	Expand from inspiration into connected ecosystems The next growth frontier is linking discovery, planning, booking and experience into one journey.

Final takeaways

Future leaders will orchestrate connected experience systems

Future leaders will not think in channels or campaigns alone, but in systems that compound relevance, trust, and experience over time

Who	Their advantage	Future imperatives			
The next generation of integrated destinations and tourism ecosystems	- AI-enabled personalization - Connected cross-sector experiences - Community and creator participation - Seamless physical and digital journeys	Build destinations as living ecosystems Future advantage will come from connecting mobility, hospitality, culture, creators and technology into one coordinated system.	Design for both humans and AI systems Brands must become emotionally meaningful for travelers and legible for recommendation systems.	Turn communities into growth engines Residents, creators and travelers will increasingly shape destination reputation and discovery.	Compete on relevance, not just reach The next generation of leaders will connect the right experiences to the right travelers at the right moment.

About LIONS Advisory

LIONS Advisory helps ambitious CMOs establish marketing as a business growth engine – fuelling cultures of creative effectiveness with the industry’s leading consultants. The LIONS Advisory team is made up of strategists with expertise in activating creative transformation based across EMEA, the Americas and APAC. We establish deep and enduring partnerships with marketers at some of the world’s largest, most influential and most successful marketing organizations.

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About Tourise

TOURISE is the world’s premier platform for shaping the future of global tourism. Powered by the Saudi Ministry of Tourism, its inaugural Summit was held November 11–13, 2025, in Riyadh.

Bringing together global leaders across government, business, investment, and technology, TOURISE drives transformative initiatives and year-round collaboration to build a tourism sector that is sustainable, equitable, and future-focused.

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