

Digital Travel

INSIGHTS

Digital Customer Journey
Maturity in Travel:

Q3 2025 Survey Report



Table of Contents

2	Executive Summary	11	A Future of Cross-Channel Integration and Enhanced Personalization
3	Foreward from the Producer	14	Missed and Future Opportunities for Improving the Customer Journey
4	About the Respondents	17	Conclusion: Next Steps for Digital Experiences in the Travel Industry
4	Key Insights	17	Key Recommendations
5	Practitioner Perspectives	18	About the Author
7	The Moderate Maturity of Digital Experiences in Travel	18	About Our Sponsor
9	Challenges in Anonymous Visitor Identification and Resource Allocation		



Executive Summary

Travel industry leaders continue to invest heavily in digital channels, yet the path to a consistently seamless customer journey remains uneven. Findings from the study reveal a field that has mastered many foundational capabilities but is now struggling with deeper personalization, data integration, and post-trip engagement.

Most travel organizations view their digital customer journey as a work in progress. Although fundamental systems such as CRM and mobile

apps are nearly ubiquitous, gaps in anonymous visitor identification, real-time decisioning, and cross-channel coherence undermine the goal of creating a high-quality, end-to-end experience.

This report explores those insights, provides pointed analysis, and offers next-step recommendations for executives committed to advancing digital maturity.

Foreward from the Producer

Welcome to our latest research report from Digital Travel Insights. I'm Jonathan Hernandez-Jimenez, producer of the Digital Travel Summit, and it's my pleasure to introduce this essential exploration of where digital travel is heading.

This report explores the state of the digital customer journey in the travel industry, spotlighting growing cross-channel integration, the evolving role of AI-powered personalization, and the opportunities for more holistic experience design. Drawing from global practitioners and leaders, you'll discover both successes—like intuitive booking and proactive in-trip support—and current challenges, notably in sustaining personalization across every touchpoint. Our findings underscore the need to move beyond channel-centric approaches, embracing advanced data strategies for deeper, more meaningful traveler engagement.

Thank you for engaging with this research and for your commitment to advancing digital excellence in travel. Stay connected with the Digital Travel Summit community for continuous insights, collaboration, and innovation as we shape the future together.



Jonathan Hernandez-Jimenez, MS
Conference Producer
Digital Travel Summit

About the Respondents

The survey participants are leaders in the travel industry occupying roles in sales, marketing, strategy, IT, data & analytics, and eCommerce. They represent organizations of various sizes, verticals, and regions. Most respondents hold the director (50%) or vice president (31%) positions.

The organizations represented in the report operate primarily on international and global scales, with 76% serving either international markets (37%) or global/intercontinental markets (39%). A majority of the organizations (55%) make \$1 billion or more in annual revenue. The industry representation is well-distributed across resort (13%), airline, auto rental, cruise line, lodging, tour operator, travel agency, and travel aggregator sectors (11% each).



81%

of the respondents hold the **director or vice president positions.**

76%

of the organizations in the report operate primarily on **international and global scales.**

Key Insights

55% rate their digital customer journey maturity “adequate,” while 44% rate it “excellent.”

65% are very satisfied with in-trip digital support, but only 34% feel that way about post-trip feedback.

78% will invest in AI-driven personalization in the next 12 months, while 75% will invest in AI-driven recommendations.

48% can identify just 30% or fewer of their anonymous website visitors.

71%

say anonymous visitor identification is their biggest optimization challenge.

67%

say cross-channel data integration is a top priority for the next year.

60%

deliver personalization at critical moments, yet only 36% sustain it across most touchpoints.



Practitioner Perspectives

Digital Travel Insights speaks regularly with travel industry leaders and traveler experience practitioners about their digital strategies. These leaders paint a picture of an industry caught between high aspirations, challenging operational realities, and a shifting travel landscape.

The complexity of modern travel planning creates overwhelming experiences for customers, particularly when trying to coordinate destinations, activities, and logistics with families. They believe there is a growing need for artificial intelligence to help solve these core planning challenges. They also stress that travelers expect the same level of personalized assistance they receive from other digital platforms, whether it's being delivered by human agents or AI.

Notably, the practitioner community shows strong enthusiasm for experimentation but advocates for starting with low-risk, high-impact initiatives. They recommend beginning with simple optimizations and testing before progressing to more complex personalization efforts.

This pragmatic approach to digital transformation prioritizes demonstrable wins while building organizational confidence in data-driven strategies and new technologies. As such, incorporating transparency and education into change management is critical, particularly around data collection and usage practices, as trust becomes increasingly central to customer relationships.

Travelers expect the same level of personalized assistance they receive from other digital platforms, whether it's being delivered by human agents or AI.



Wunderkind

Your Next Booking Is Already on Your Site. Do You See It?

Travelers browse endlessly before booking—jumping between tabs, devices, and channels over weeks. In this competitive space, timing, relevance, and personalization are what turn dreamers into bookers.

The key? Identity resolution: recognizing travelers everywhere and using that insight to deliver real-time, intent-driven messages.

Build with Wunderkind lets travel brands plug world-class identity and behavioral data into their tech stack. With flexible APIs and industry-leading decisioning, marketers run campaigns on their terms—no vendor lock-in.

Here's how top travel CMOs turn data into bookings:



Reach Everyone

Engage known and anonymous travelers with an identity network covering billions of devices.



Convert at the Right Moment

Trigger personalized offers across email, SMS, and ads when booking intent peaks.



Go Live Fast

Launch in weeks with minimal tech lift.

[Download the full guide](#) and learn how to turn fragmented interactions into revenue-driving journeys—before your competitors do.

[Get the Guide](#)



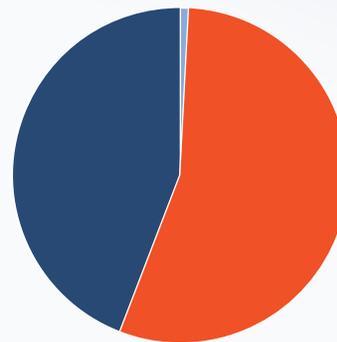
The Moderate Maturity of Digital Experiences in Travel

Consumers have overwhelmingly shifted their travel planning and purchasing behavior to digital channels, preferring to use low-touch online tools to book travel as much as possible. In response, the travel industry has spent the past several years overhauling the digital customer journey.

Most of the organizations surveyed describe their customer-journey optimization as either adequate (55%) or excellent (44%). They have a moderately integrated approach with some personalization, or they have a well-integrated, data-driven approach that many consumers now view as standard in the industry. None of the respondents believe their digital customer journeys are “exceptional,” as they are not advanced, optimized, or AI-powered as they could be.

Digital transformation in the travel industry has reached a plateau where incremental gains are harder and require more specialized capabilities. While travel companies have made strides toward improving their digital experiences, they need additional tools and strategies to reach what they consider the ideal.

How would you rate the maturity and optimization of your organization’s current digital customer journey?



- **0%** **Very poor:** We are just beginning to optimize our digital customer journey.
- **1%** **Poor:** We have basic digital touchpoints in place but limited integration across channels.
- **55%** **Adequate:** We have a moderately integrated approach with some personalization.
- **44%** **Excellent:** We have a well-integrated, data-driven approach across most touchpoints.
- **0%** **Exceptional:** We have an advanced, AI-powered, fully optimized digital customer journey.

“ PRACTITIONER PERSPECTIVES

“You have to understand your customer and what their needs are, then leverage that against what you have internally. The organization may have already built a mechanism for change, but failed to help everyone understand that the change exists. We have to communicate and work together to make changes happen. If we don’t, the change will stay in a silo, unused, and no one will even realize it’s there.”

Neil Valentine, Chief Strategy Officer, Hotel Planner, “Panel: Effectively Navigating Digital Transformation at your Organization,” **Digital Travel Summit, 2024**

The strong showing in basic experience layers—web, mobile, and reservation systems—proves that travel brands have already benefited from the “low-hanging fruit” of digital enablement.

Booking engines are intuitive, and mobile check-in is nearly standard, driving 61% of the respondents to say customers are very satisfied with the booking and reservation phase. During the trip itself, proactive alerts, self-service re-booking, and live chat have led 65% of customers to be “very satisfied,” indicating that operational teams have tuned workflows to support travelers when the stakes are highest.

Yet the moment a guest closes the booking loop, cracks emerge. Post-trip pillars such as feedback capture, loyalty enrollment, and personalized re-engagement are lacking, with fewer than 40% of the respondents claiming customers are very satisfied. This suggests that journey maps still taper off where long-term relationship value should begin.

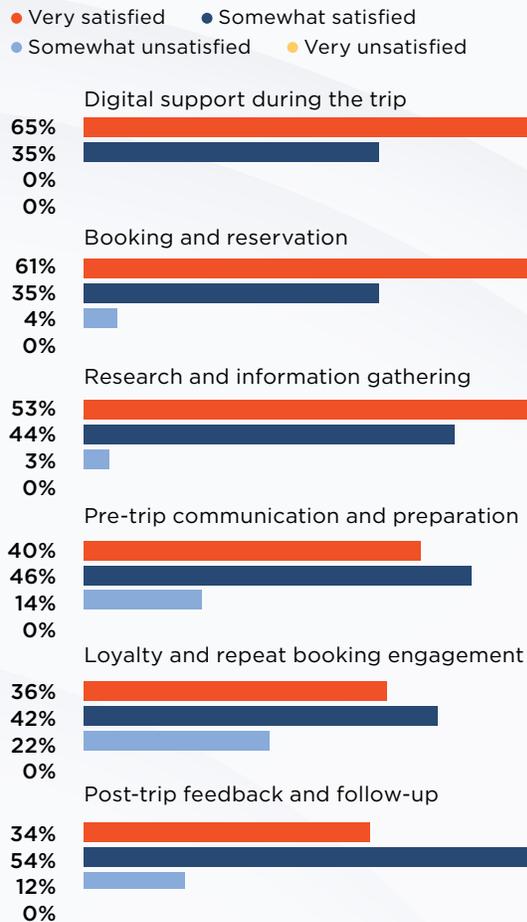
The cause often lies in siloed data, such as when loyalty systems, operations databases, and guest-sentiment tools can’t “speak to each other” in real time.

This middle-tier maturity carries strategic consequences. Without a unified data core, every “next best action” engine pulls from partial profiles, creating redundant messaging or irrelevant offers that erode brand trust over time.

Decision makers also face measurement blind spots. As we will learn, 33% struggle to calculate ROI on journey investments, primarily because attribution chains break between marketing clouds and reservation systems.

Stagnation risks are further amplified by rising traveler expectations. Consumers now treat AI-personalized media feeds as the baseline, turning to travel providers with the same appetite for hyper-relevance. When an airline serves route suggestions that ignore loyalty status or recent searches, the lapse is instantly noticeable and costly in an environment where switching costs are low.

From your experience, how satisfied are travelers with the following stages of your organization’s digital customer journey?



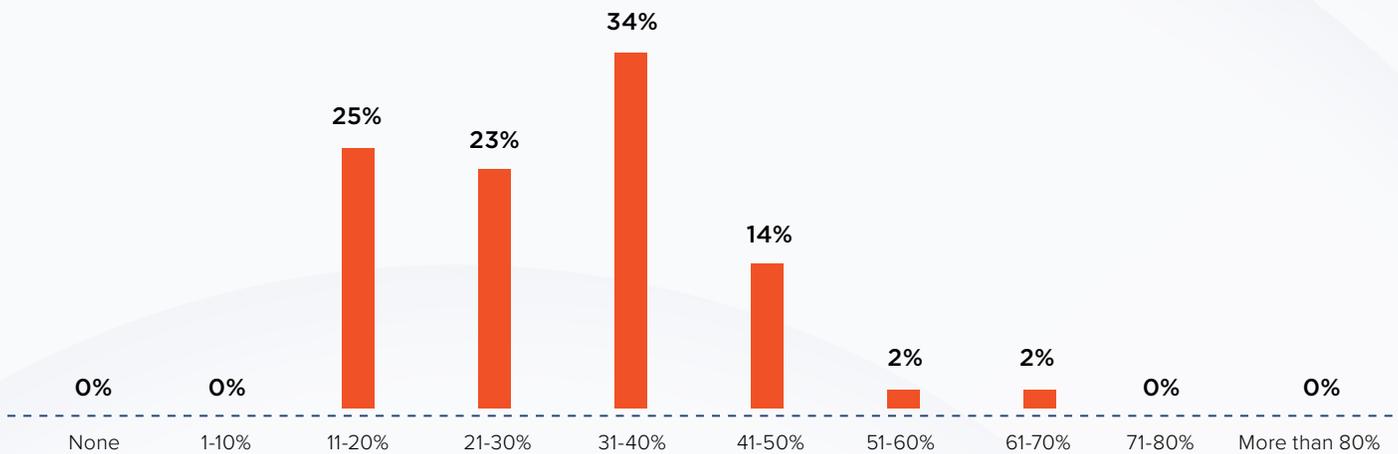
To improve maturity, teams must elevate from channel-centric tactics to holistic experience design.

That leap demands a clearer view of guests across the booking, in-trip, and post-trip stages, supported by real-time analytics that can trigger contextually appropriate interventions. Until then, “adequate” and “excellent” ratings risk becoming complacent benchmarks rather than catalysts for continued innovation.

Challenges in Anonymous Visitor Identification and Resource Allocation

The study highlights a paradox: Advanced marketing ideas abound, yet basic identity resolution has not been solved for nearly half the sector.

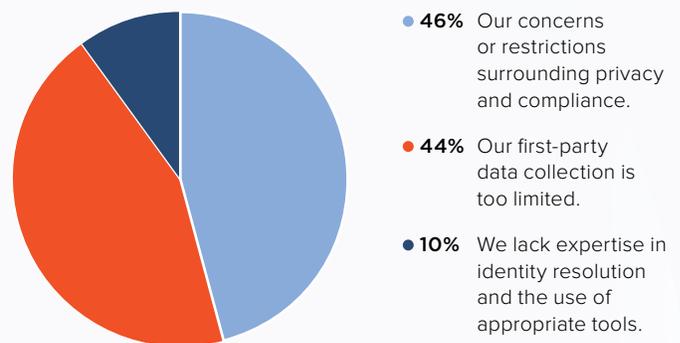
To the best of your knowledge, what percentage of anonymous website visitors can your organization identify without relying on third-party cookies?



Forty-eight percent of respondents identify 30% or fewer of their anonymous visitors—a fundamental obstacle given the anonymous majority typical of high-consideration travel bookings.

Privacy legislation and evolving browser standards complicate tracking, but respondents point to internal hurdles as well: 44% admit their first-party data collection is insufficient, while 46% struggle with compliance knowledge gaps that slow experimentation. When taken together, these issues create a cycle in which limited data yields weak personalization, which in turn suppresses opt-in rates, further constraining signal volume.

You said you can identify 30% or fewer anonymous visitors who use your website during their digital journeys. Which of the following is your biggest barrier to better anonymous visitor identification?

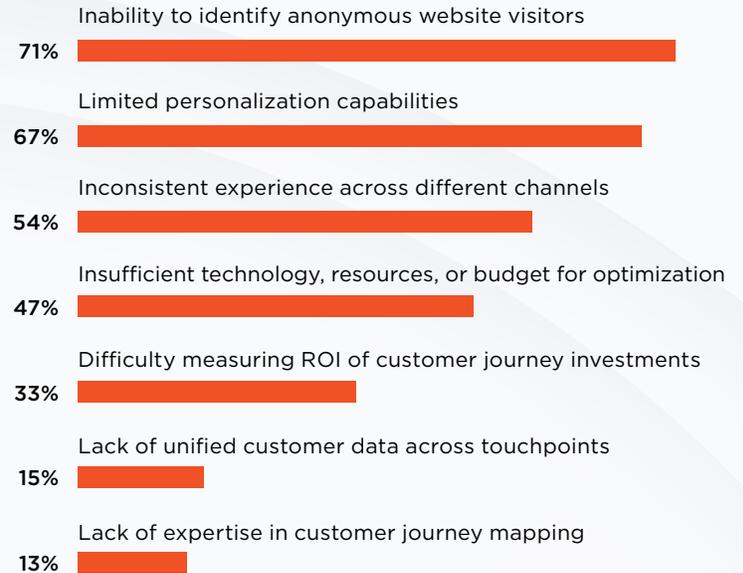


Inability to recognize the traveler early in the journey cascades into broader experience limitations. Seventy-one percent call this blind spot their top challenge, dwarfing other issues such as inconsistent cross-channel experiences (54%) and limited personalization tooling (67%). When a prospective guest remains anonymous, real-time segment assignment falters, thwarting intent-driven retargeting and on-site messaging.

Resource constraints deepen the struggle. Nearly half of respondents (47%) cite insufficient budget, technology, or staffing as a top-three challenge, limiting upgrades to data pipelines or decisioning platforms. Even when funds exist, practitioners struggle to document ROI because outcomes are difficult to tie directly to identity-resolution improvements.

Altogether, this creates a dilemma where measurement gaps stifle investment and under-performance continues.

What are the three biggest challenges your organization faces in optimizing the digital customer journey?



When a prospective guest remains anonymous, real-time segment assignment falters, thwarting intent-driven retargeting and on-site messaging.



A Future of Cross-Channel Integration and Enhanced Personalization

Asked to prioritize the next 12 months, travel leaders are focusing on cross-channel data integration (67%), reflecting recognition that siloed platforms have become the chief inhibitor of cohesive experiences. Integrating data flows across web, mobile, call center, and on-property systems represents a prerequisite for more ambitious capabilities.

AI-powered marketing automation ranks second at 61%, signaling the industry’s readiness to move beyond rules-based segmentation toward predictive, self-optimizing journeys. Leaders increasingly see machine learning not as a radical innovation but as the practical means to manage the scope and scale of their customer experiences strategies.

Mobile experience optimization follows closely at 57%, a nod to the device’s dominance during both inspiration and in-destination phases. Enhancements focus on contextual push notifications, simplified re-booking flows, and embedded loyalty widgets that remove friction between browsing and purchase.

Over the next 12 months, how much priority will the following efforts be for your digital customer journey optimization efforts?

- This will be a top priority
- This will be an important priority
- This will be a moderate priority
- This will not be a priority



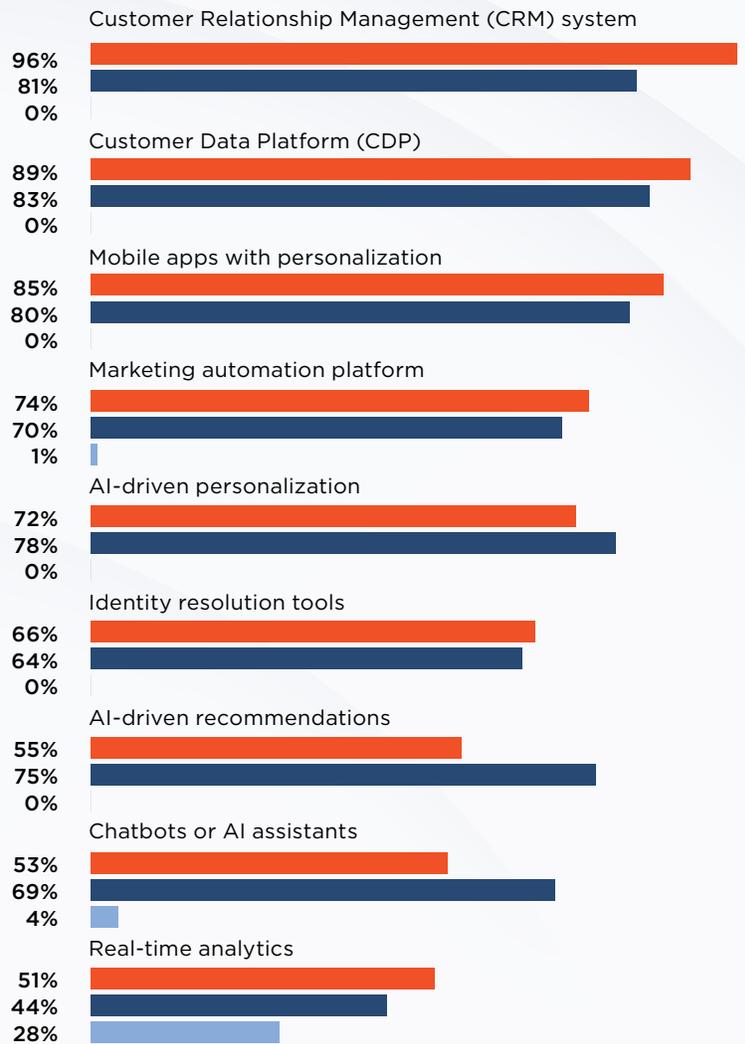
As teams chase higher fidelity insights, analytic latency also surfaces. Only 51% have real-time analytics activated, curbing their ability to display contextual offers at the moment-of-truth window. Meanwhile, AI-driven product and content recommendations sit at 55% adoption. This is an encouraging result, but real-time analytics will be necessary to push it forward.

These constraints compel many brands to narrow the journey lens to conversion-centric KPIs, sacrificing holistic lifetime metrics such as repeat booking frequency and loyalty tenure. While channel owners can claim short-term wins, the enterprise misses richer share-of-wallet opportunities forged through visitor identification and sustained omnichannel personalization.

The human side of the equation matters as well. Skill shortages in data science, consent management, and journey orchestration slow progress, especially for mid-sized operators that cannot match the talent budgets of large enterprises, such as global online travel agencies (OTAs). Although many vendors can provide organizations with turnkey solutions, system complexity and legacy integration require specific skills and can delay time-to-value.

Which of the following technologies does your organization currently use to support digital customer journey optimization, and in which will you invest in the next 12 months?

- We use this today
- We will invest in this in the next 12 months
- We may or may not invest in this beyond 12 months

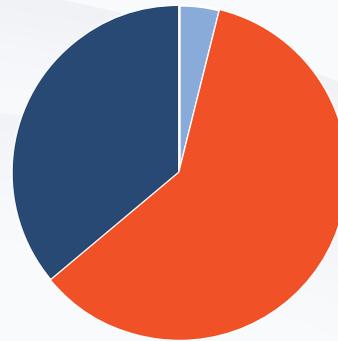


As a result, 60% of the organizations in the study say they can only personalize experiences at a “moderate” level—based on customer demographics and behavioral analysis at critical points.

At 36%, more than one third rate their personalization capabilities as “significant.” This means they can personalize based on customer needs, values, and lifestyles across most touchpoints. However, none of the respondents consider their personalization capabilities “sophisticated.” They can’t deliver “highly targeted, AI-driven personalization at scale.”

Overall, identity resolution appears to be the pressure point where privacy, technology, and resourcing collide. Until leadership addresses that convergence, even well-funded personalization programs will struggle to unlock their full value potential. Addressing issues in these areas will also be critical for future efforts in digital travel, such as the integration of advanced AI technologies for marketing, personalization, and prediction.

To what extent does your organization currently personalize the digital customer journey?



- **0%** We don't currently personalize the digital customer journey.
- **4%** **Minimal:** We can personalize based on basic customer segments at some points.
- **60%** **Moderate:** We can personalize based on customer demographics and behavioral analysis at critical points.
- **36%** **Significant:** We can personalize based on customer needs, values, and lifestyles across most touchpoints.
- **0%** **Sophisticated:** We deliver highly targeted, AI-driven personalization at scale.

“ PRACTITIONER PERSPECTIVES

“We rely on AI to forecast whether a marketing campaign will work before we launch it. When we create AI-generated content, we use it to enhance—never replace—our existing material, because staying authentic for visitors is crucial. No one likes a slick video that promises an experience the real product can't match.”

Matt Eggleston, Vice President Digital, Escape Campervans, “Panel Discussion: A Deep Dive Into 4 AI Journeys: Pitfalls, Victories and Venturing into The Great Unknown,” **Digital Travel Summit, 2024**

Missed and Future Opportunities for Improving the Customer Journey

Conversations with the respondents reveal significant gaps between current capabilities and the personalized, seamless experiences that modern travelers expect. Specifically, the respondents were asked to identify “missed opportunities” within their digital customer journeys, as well as what they believe to be their organization’s biggest opportunity to improve over the next 12 months.

“Missed Opportunities” in the Digital Customer Journey

Respondents say they have missed opportunities to use more effective types of personalization, deliver meaningful rewards, create community, and design a better post-purchase experience.

Personalization Blind Spots

Many brands still push generic content. One respondent admits, “Our digital journey does not differ for different customer segments,” while another notes, “We don’t personalize messages based on where someone is on their journey.” The absence of adaptive content stalls conversion and loyalty, as experiences become less meaningful for some customers.

Disruptions in the Journey

Failed payments, crashes, or slowdowns of the digital journey due to technical issues often force travelers to restart. This is a considerable burden when every moment counts and customers can easily switch to a different brand with more reliable services.

“If a payment fails during booking, our users often have to start their search from the beginning,” one leader says. Others add that customers struggle to “pick up from where they left off,” revealing brittle save-state logic across devices.

Under-Nurtured Loyalty

Some of the respondents say their rewards lack clarity and emotional pull.

“Our loyalty points process is confusing,” one comment states; another complains, “We have no system to reward loyal customers for writing reviews.”

Without clear incentives, advocacy loops break down. By offering rewards for reviews, brands can encourage more peer-to-peer engagement among their customers and build trust at little cost.

Lack of Community

Similarly, one leader says they see “hardly an identifiable community” in their digital customer journeys. Their sites and digital touchpoints rarely surface tips, comments, or suggestions provided by users, nor do they encourage visitors to engage with their peers. This forfeits opportunities for organic engagement and trust.

Gaps in Holistic Care

Respondents also say their digital experiences are missing micro-services that can add value to travelers’ journeys. These can include traffic alerts to airports, sustainability filters, weather-based apparel advice, and embedded expense tracking.

These omissions suggest brands and their systems are overly focused on bookings and sales rather than providing customers with holistic support across their entire trip.

“We fixate on purchase but not before or after,” says one respondent. Organizations offer customer support at the point of purchase, but they rarely follow up, causing the brand to miss easy moments to convert relief into delight.

“Biggest Opportunities” for the Year Ahead

Looking ahead, travel leaders want to develop vibrant communities, offer faster, more relevant types of engagement, encourage customers to share their experiences, and unify data for a more complete view of their customers.

Vibrant Communities

Leaders envision “an online community which provides tips, recommendations, and other such insights.” Instead of focusing on transactions, brands want to build an ecosystem of ideas and insights for travelers to visit. Forums and trip stories can deepen brand stickiness and lower acquisition costs.

Real-Time, Hyper-Relevant Engagement

Geo-targeted pushes and AI recommendation engines are popular targets for travel leaders. One respondent is “excited about using AI to provide smarter recommendations ... based on what customers are currently browsing.”

These types of context-aware nudges can improve purchase volumes as well as satisfaction.

Self-Service Expansion

Executives want “additional self-service options to help travelers easily adjust their bookings.” Much of this expansion will occur with AI adoption.

For example, customers could benefit from natural-language search and generate answers to specific travel questions. These investments could reduce call-center volume and empower travelers to pursue their own goals.

Trust and Reassurance

Brands intend to make their privacy and security controls clearer to digital customers, as security continues to be a top concern among travelers. Some of the respondents suggest automating compensation due to travel delays or setbacks. These moves can transform risk moments into loyalty wins.

Inclusive Design

Accessibility audits, multi-language support, and child-friendly filters appear in several of the respondents' comments. Travel leaders believe inclusivity isn't just a compliance issue; it's an opportunity to reach more customers and demonstrate commitments to all members of the travel community.

Emotional and Personal Engagement

Simple gestures—birthday acknowledgments, milestone badges—stand out to customers. "Acknowledging birthdays will go such a long way," one leader says.

Far from being gimmicks, this type of engagement can drive travelers to take action, especially when coupled with special offers or discounts.

Unified Data

Notably, nearly all these ambitions hinge on "a single profile for each customer on all channels," as one respondent describes it. Accelerating CDP rollouts and real-time APIs will be critical to any advanced data initiatives, as they typically serve as a foundation for a unified, single source of truth for all customer data.

“ PRACTITIONER PERSPECTIVES

"We focus on making sure everything works smoothly across all platforms. Our marketing automation software has played a huge role in how we personalize our efforts. Creating emotional engagement comes naturally with the kind of content we put out, but we needed to highlight that through our brand values. Finally, we need to ensure our digital interactions are genuine and authentic."

Matt Nicklow, Global Head of Digital, Tourism Fiji, "Crafting Tomorrow's Travel Experiences: Predictive Strategies for Unforgettable Journeys," **Digital Travel Summit, 2024**

Conclusion: Next Steps for Digital Experiences in the Travel Industry

Travel brands have conquered foundational digital milestones, yet genuine end-to-end maturity still eludes most organizations. The roadblocks—identity resolution, data silos, and resource gaps—are surmountable, but doing so will require coordination between the executive, technical, creative, and service branches of each brand.

As such, leaders can accelerate progress by treating journey optimization as a cross-functional mandate, not a marketing project. Aligning governance, data stewardship, and measurement frameworks around the traveler rather than the channel will lay the groundwork for higher personalization fidelity and elevated post-trip engagement.

Beyond digital transformation, travel industry practitioners intend to create more holistic experiences for their customers. These will be focused on community-building and more robust after-purchase experiences, including apps and engagement measures that provide additional value to travelers.

In the travel industry, the digital customer journey will be data- and technology-enabled, but it will emphasize human-centricity, customer empowerment, storytelling, and self-service.

Key Recommendations

Tackle identity resolution at the source:

Deploy progressive profiling, consent-aware data capture, and server-to-server integrations that enrich profiles continuously.

Build a real-time decisioning layer:

Connect CDP data to AI engines capable of ingesting signals and triggering contextual offers within milliseconds.

Redesign post-trip touchpoints:

Treat feedback collection, loyalty prompts, and re-engagement as integral journey stages, embedding them in automated workflows rather than manual campaigns.

Pilot, measure, and scale AI projects:

Launch narrow AI personalization pilots with clear KPIs. This will help you demonstrate each project's incremental value, so you can expand coverage while refining models against longitudinal metrics.



About the Author



Digital Travel Insights, the industry research and digital publishing arm of Digital Travel, delivers cutting-edge data and analysis on trends, challenges, and opportunities in the digital travel sector. Through comprehensive research reports, webinars, and thought leadership initiatives, we empower senior-level travel leaders to make informed strategic decisions and stay ahead in the rapidly evolving digital landscape.

Our deep industry intelligence not only informs travel leaders but also connects innovative solution providers with key decision-makers, fostering a dynamic ecosystem that drives the future of digital commerce in the travel space.

For more information, please visit wbrinsights.com.

About Our Sponsor

Wunderkind

Wunderkind is redefining agentic marketing decisioning, where identity meets AI to deliver increased revenue through personalization across channels. Our Autonomous Marketing Platform (AMP) uses a proprietary identity graph — tracking 9B+ devices and 2T+ digital events annually — to transform anonymous web traffic into known customers, without third-party cookies. AMP dynamically triggers messages across email, text, and ads, optimizing creative, channel, and timing in real time. Seamlessly integrating via SDKs, APIs, and natively with ESPs, it fits any stack without requiring replatforming. Brands like Omni Hotels and Seaworld rely on Wunderkind to unlock reach and revenue, with \$5B+ in attributable sales annually and consistently top-ranking channel performance.

For more information, please visit wunderkind.co.

