

GUIDE

# DX maturity report for travel and hospitality

2025 report





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We hope the following report will help align and inspire brands in Travel and Tourism by strategically leveraging marketing technology to advance up the scale of digital maturity. ●●

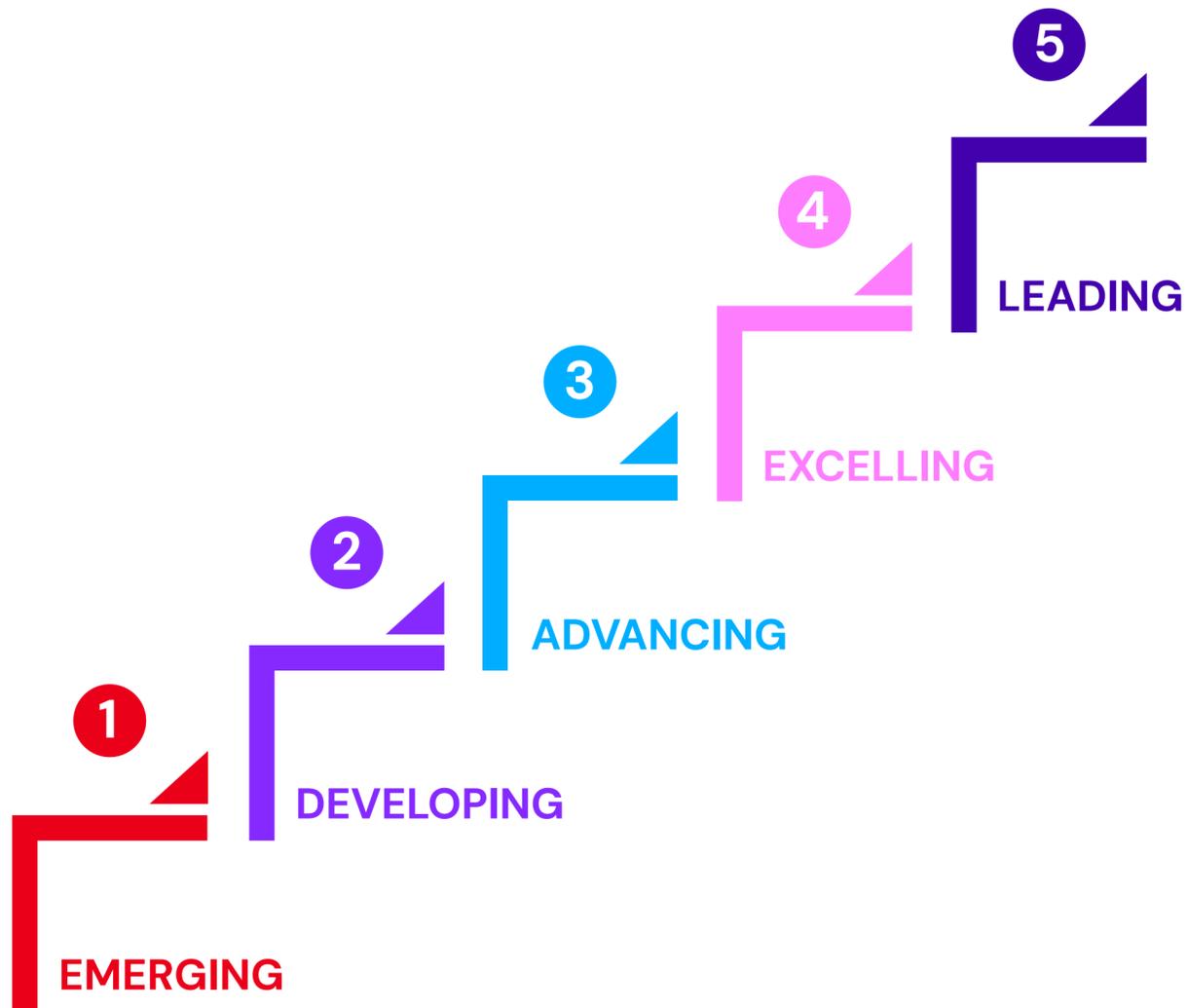
RICK BAUER, INDUSTRY VALUE ADVISORY TEAM,  
TTH INDUSTRY LEAD, SITECORE

#### ABOUT SITECORE INDUSTRY VALUE ADVISORY

Sitecore's Industry Value Advisory team (IVA) is a global strategic unit of Sitecore. We are industry practitioners, digital experience strategists, and value consultants with deep industry and functional expertise. This complimentary consulting team collaborates closely with your brand's leadership to identify and accelerate tangible business results through digital experience solutions.

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## Sitecore's digital experience maturity model (DXMM)

Sitecore's digital experience maturity model, or DXMM for short, is designed to guide brands on their path to digital experience leadership. At its core, the DXMM helps organizations gauge their current digital capabilities and map out practical steps for leveling up across multiple areas of the customer experience.

The DXMM, originally launched in 2013, has been consistently updated for over a decade. Thousands of Sitecore customers across various industries have leveraged this quick, 10-minute online assessment to identify their strengths and chart a path forward.

You can take the assessment today: [siteco.re/dxmm](https://siteco.re/dxmm)

The DX maturity assessment scores respondents across six dimensions of digital maturity, and it identifies which maturity level your brand is at today. The DXMM categorizes digital maturity into five levels that encapsulate a brand's progression in digital experience capabilities ranging from foundational stages of an emerging digital presence to the innovation of brands leading their industry and setting the bar for engaging digital experiences.

Our report explores DX maturity within the travel and hospitality industry, based on respondents that completed the DXMM assessment this year, along with data provided from other reliable industry reports.

Sitecore's industry and value advisory team has aggregated data, outlined some of this year's most impactful trends affecting marketers and developers at airlines, hotels, OTAs, cruise lines, and other brands within the travel, tourism and hospitality (TTH) sector. You'll also find customer case studies and partner perspectives from Sitecore's robust implementation partner ecosystem.

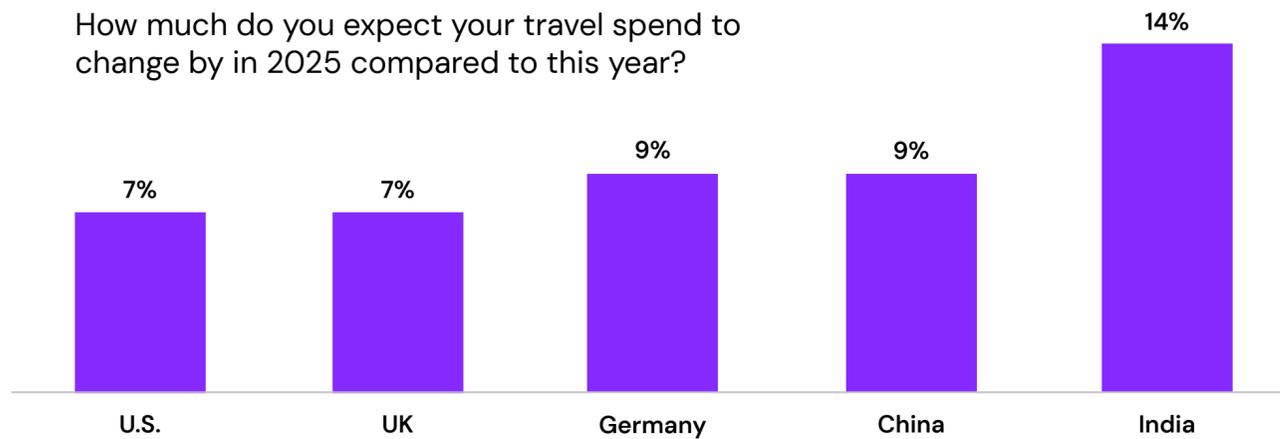
# The economics of maturity in the Travel and Tourism sector

Global consumers rank travel as their most important discretionary purchase in 2025. This includes number one rankings from US, UK, Germany, China, and India – over dining, entertainment, electronics, home improvements, and fitness – according to Skift Research (December 2024).

Now well past the pandemic and post-pandemic revenge phase, the TTH industry is leveling off to a cruising pace of growth that IMF expects to increase at a “GDP-plus” growth rate of 3.2%. The five countries listed above expect to spend on average 9% more on travel this year, with India leading the way at 14%.

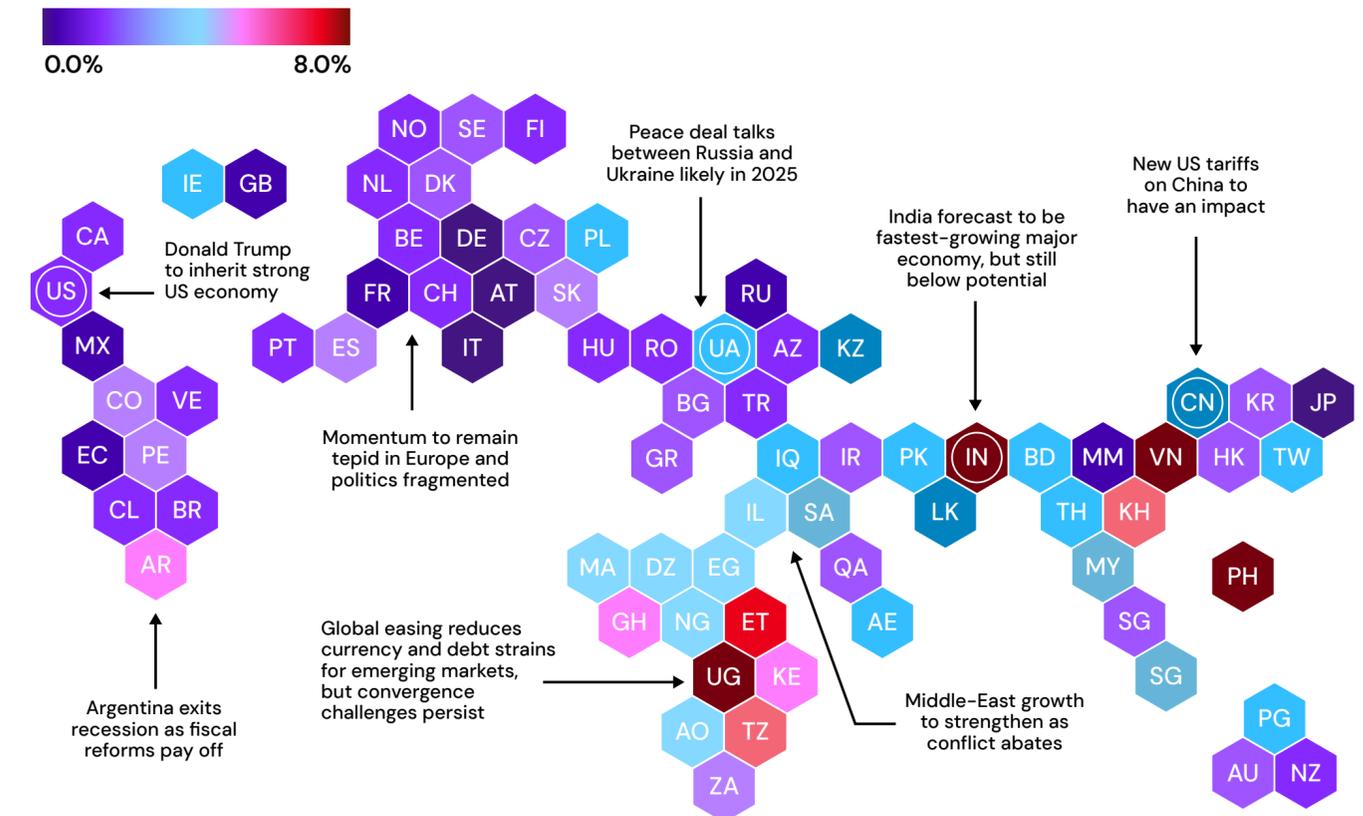
Travel spending is set for moderate, yet steady climb across all regions in 2025

How much do you expect your travel spend to change by in 2025 compared to this year?



Skift Research Travel Outlook Survey, n=258 (U.S.O, 324 (UK), 261 (Germany), 257 (China), 529 (India). Date as of December 2024

The Economist intelligence unit is forecasting that the global economy will expand by 2.7% in 2025 with an existing strong economy in the US, fragmented economy across Europe and other socioeconomic impacts across the globe.



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# Consumers seek escapism

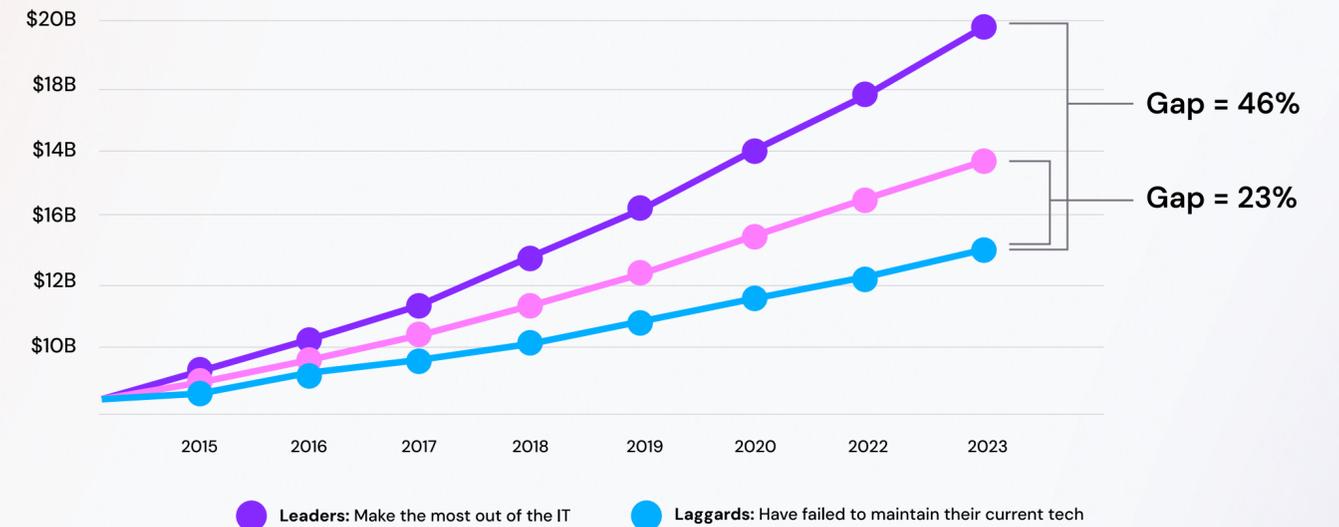
Within this steady global growth, a McCann Worldgroup study shows that consumers and their wallets are focused on escapism for reasons ranging from “State of the World” (US, UK, ESP) to escaping their job (Japan) or escaping their parents (China), with 91% responding “everyone needs to escape occasionally.” This “Escape Economy” has a current total value of 9.7 trillion dollars, and according to MW TruthCentral the lion’s share of this budget is dedicated to global travel and tourism, at \$3.1 trillion.

The escape economy



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Modernizing your business is the key to staying ahead of the curve

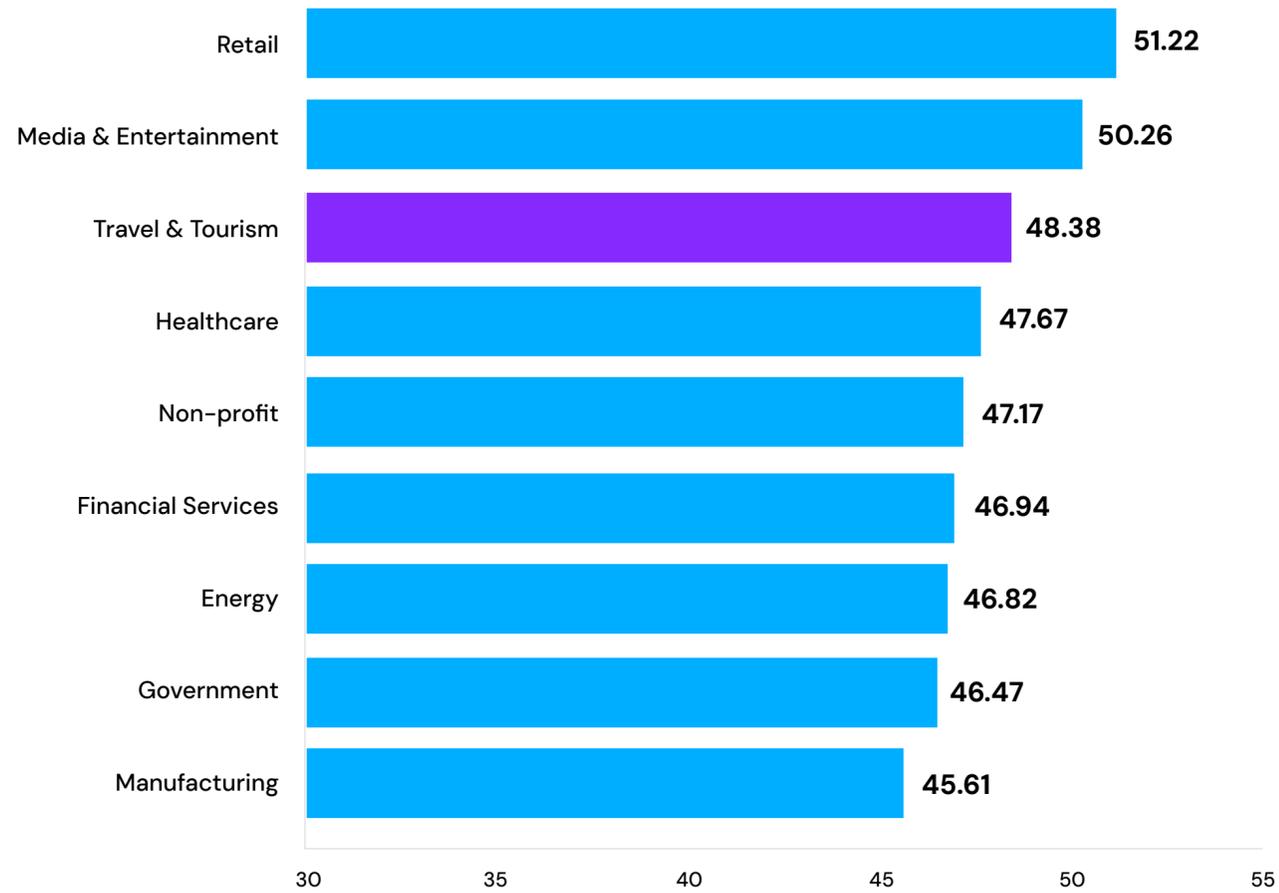


These same consumers are immersed in personalized content daily. From streaming services like Netflix and Hulu, or shopping sites like Amazon and Alibaba, to music services like Apple Music and Spotify – consumers’ expectations are high when it comes to personalized relevant content. To capture the market we are well past the point of personalization being the expected norm. We have moved into finding ways to accelerate the process on an exponential scale. This 2023 trend from Accenture shows the value gap widening between technology leaders and laggards, and with the explosion of artificial intelligence we would expect this gap to widen significantly year over year.

Research based on an Accenture survey of 8,356 companies across 20 countries and 20 industries  
Source: Accenture, 2023: “The Journey of Modernizing Your Digital Experience,” S Knight & M Allmark

Compared to other industries, TTH ranks near the top of digital maturity. With 85% of travel industry conversions happening on-line, it is critical that we speak to conditioned consumers in a way that resonates with them, be they a domestic or global traveler or digital nomads, solo eco-travelers or travelers seeking off-the-beaten-path destinations.

Travel and hospitality ranks near the top of Digital Maturity





# Looking ahead

Modern travelers are no longer simply seeking destinations; they expect curated, hyper-personalized experiences that align with their preferences, values, and travel behaviors. With the travel and tourism industry exiting the recovery era of the pandemic, it now finds itself navigating a landscape marked by:

- **Generative AI revolution:** Tools like ChatGPT are empowering travel marketers to create content at scale, yet consumers demand messaging that feels authentic and experiential.
- **Sustainability concerns:** Consumers are increasingly prioritizing eco-friendly travel options, making sustainability an essential component of marketing strategies.

With the World Travel and Tourism Council (WTTC) projecting that the global travel and tourism sector will grow by 5% annually through 2030, with a total contribution of \$10 trillion to global GDP by 2025, and 68% of travelers saying they are more likely to book with a brand offering personalized experiences (Source: Expedia 2024 Report), lagging is not an option.

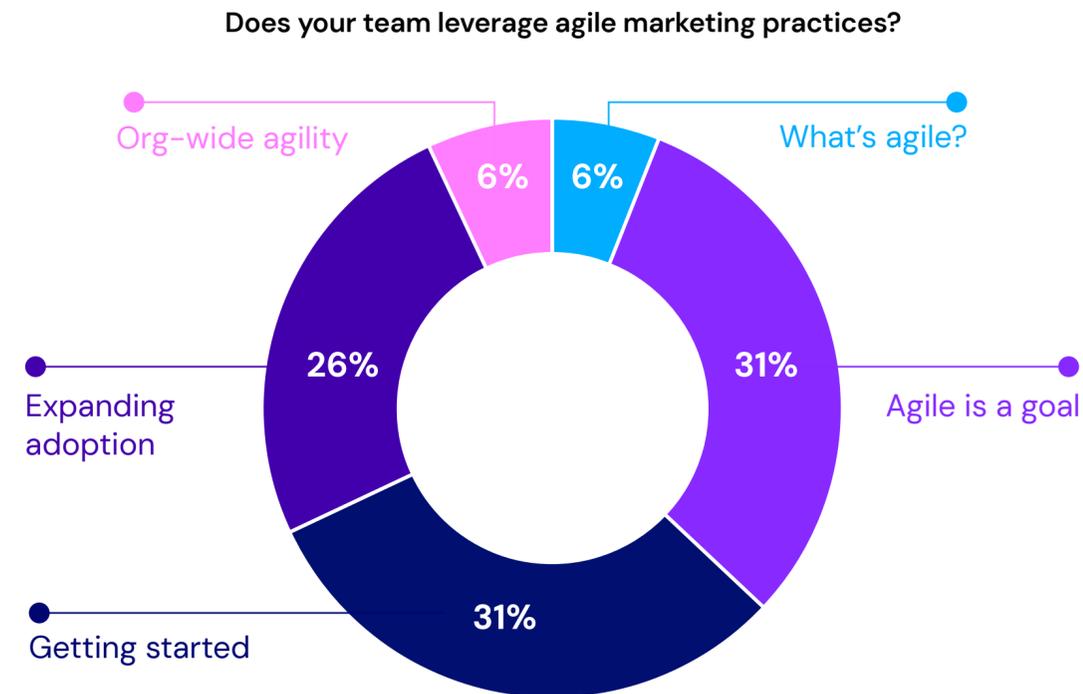
To support acceleration to leadership, it is important to put a stake in the ground and understand where your organization is today. Sitecore's free Digital Experience Maturity Assessment is designed to deliver a starting place across six key dimensions. This is certainly not an exhaustive view of digital maturity, but rather a lightweight starting place in the form of an approximately 10-minute survey to be shared with a cross-section of your digital marketing organization (marketing, tech, data and business leaders and contributors). For this report we will focus on five dimensions that include:

- Content agility
- Omnichannel engagement
- Data and analytics
- Technology
- Culture and organization

# Content agility

This dimension examines how travel and hospitality respondents rate their ability to create, manage, and deploy content quickly and effectively. Insights focus on adaptability, speed of content creation, and how well organizations align content strategies with the fast-paced demands of modern marketing.

Content agility in the travel and hospitality sector means more than just quickly producing marketing content. It involves strategic responsiveness, efficient resource use, customer focus, and competitive readiness in a changing market. **Many in the travel and hospitality industry struggle to keep up with content marketing demands, with 49% of TTH marketing professionals reporting they "can't keep up"**. This struggle is often due to siloed content, which is scattered and maintained across different channels, regions, and business units. To meet content demands, organizations should use agile content strategies that centralize digital assets into a single source for powering omnichannel experiences.



Here's a breakdown of how to achieve content agility:

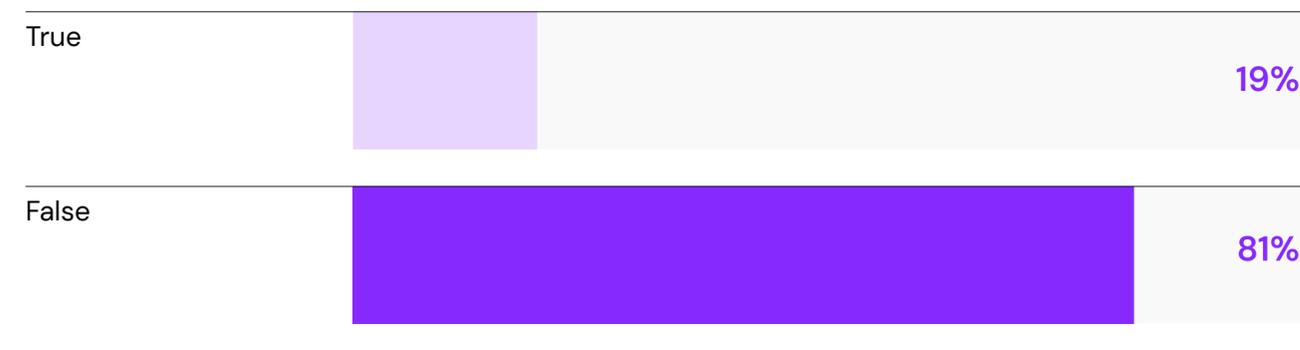
- **Centralized content governance:** Essential for promoting destinations, attractions, and services, streamlining the creation, management, and delivery of accurate, up-to-date content across multiple channels. A single source of truth for all content ensures governance, collaboration, and efficiency across global teams.
- **Efficiency:** Centralizing digital assets ensures efficiency across global teams.
- **Customer-centricity:** A single platform for booking flights, accommodations, car rentals, restaurants, and entertainment enables a friction-free experience.
- **Competitive readiness:** In competitive markets, a memorable customer experience becomes a key differentiator.
- **Omnichannel experiences:** Consistent messaging across channels, enabling seamless transitions throughout the travel journey, is enabled by systems like Sitecore's XM Cloud and Personalize. By delivering tailored experiences across every stage of the traveler journey, brands can increase satisfaction, drive ancillary revenue, and build long-term customer relationships.
- **Scalability:** Tools like Sitecore's Content Hub helps create and manage sustainability-focused campaigns and messaging for traveler engagement. Sitecore's cloud-native, API-first architecture offers flexibility and scalability for integrating content, customer, and marketing platforms seamlessly into an enterprise ecosystem.

# Omnichannel engagement

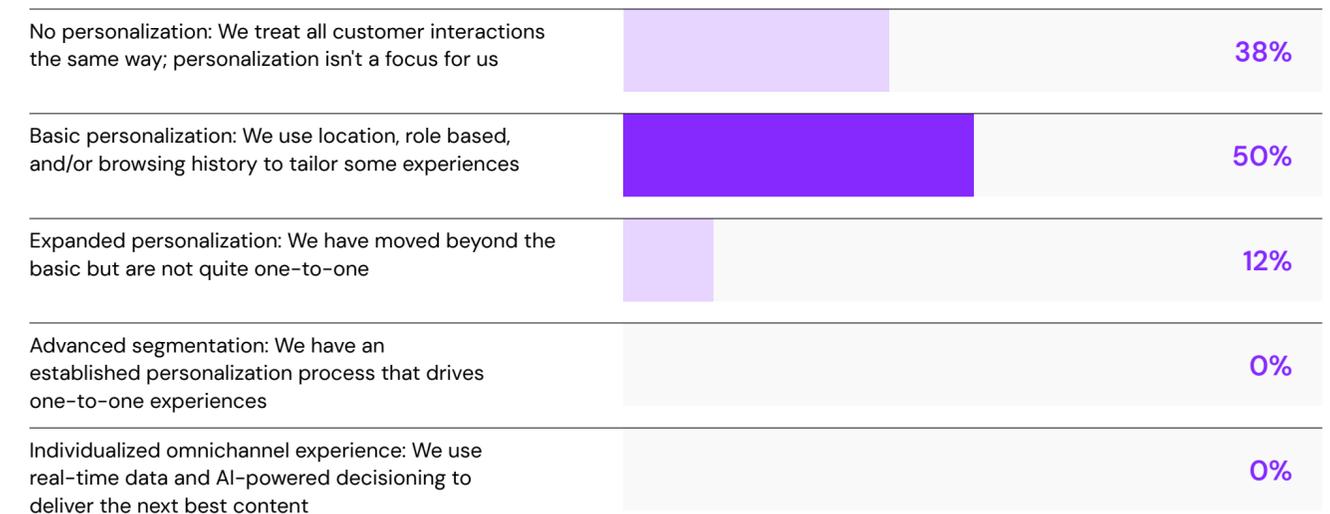
This section explores how travel brands engage with customers across various platforms and touchpoints. The findings highlight trends in personalization, consistency, and sophistication in delivering cohesive customer experiences across both digital and physical channels.

Omnichannel engagement, a key aspect of digital experience maturity, guarantees consistent and seamless interactions across all channels, including social media, email, websites, apps, and in-person experiences like airport displays or in-room messaging. To achieve this, businesses use personalization, marketing automation, and A/B testing to create relevant and engaging customer experiences. Personalized, contextually relevant content is beyond essential for marketing strategies. Delivering the right offer at the right time improves conversions, and messaging that aligns with a customer's journey stage and interaction history strengthens loyalty and brand resilience. However, many airlines and hotels currently have low personalization maturity with only 19% saying they can dynamically change content.

## Our marketing team has the ability to dynamically change content for personalization and testing



## In what ways is your brand personalizing the customer experience?



Here's how to improve omnichannel engagement and personalization:

### Unified customer data:

- Unify customer profiles to act on customer insights and drive omnichannel customer experiences.
- Achieve a 360-degree customer view by unifying data from across first and third-party sources.
- Use CDPs (Customer Data Platforms) to centralize behavioral, transactional, and demographic data for actionable insights.



#### Personalization:

- Use AI-powered tools to deliver context-aware experiences to granular audience segments.
- Offer customizable add-ons like room upgrades, meal plans, and exclusive activities.
- Deliver real-time updates and personalized recommendations.
- Personalize digital experiences at every stage—dreaming, planning, booking, pre-travel, during travel, and post-travel—to improve engagement and loyalty.

#### Seamless experiences:

- Offer single-platform booking and experience curation.
- Enable customers to book flights, accommodation, car rental, restaurants, and entertainment from different providers using a single platform.

#### Marketing technology (Martech):

- Align martech strategies with CX (customer experience) goals.
- Use cloud-based, AI-enhanced marketing technology platforms and tools to deliver seamless, personalized experiences.

**Mobile-first approach:** Emphasize customer engagement through mobile-first booking experiences and real-time updates.

**Loyalty programs:** Integrate loyalty into the experience to incentivize customers to buy more different things as part of their experience.

**AI-powered chatbots:** Deploy AI-powered chatbots for 24/7 customer support and faster query resolution.

To effectively implement these strategies, travel and hospitality brands can consider the following:

**Address challenges:** Overcome challenges such as limited data integration and lack of internal skills by working with external partners.

**Invest in technology:** Adopt AI-driven loyalty platforms and advanced CRM systems for personalization based on historical travel data.

**Optimize for mobile:** Design and build websites that align with mobile-friendly criteria.

**Data analytics:** Use advanced data analytics to forecast demand and trends.

By focusing on these areas, airlines, hotels, OTAs, cruise lines and more can enhance their digital presence, improve customer engagement, and drive revenue growth.

# Data and analytics

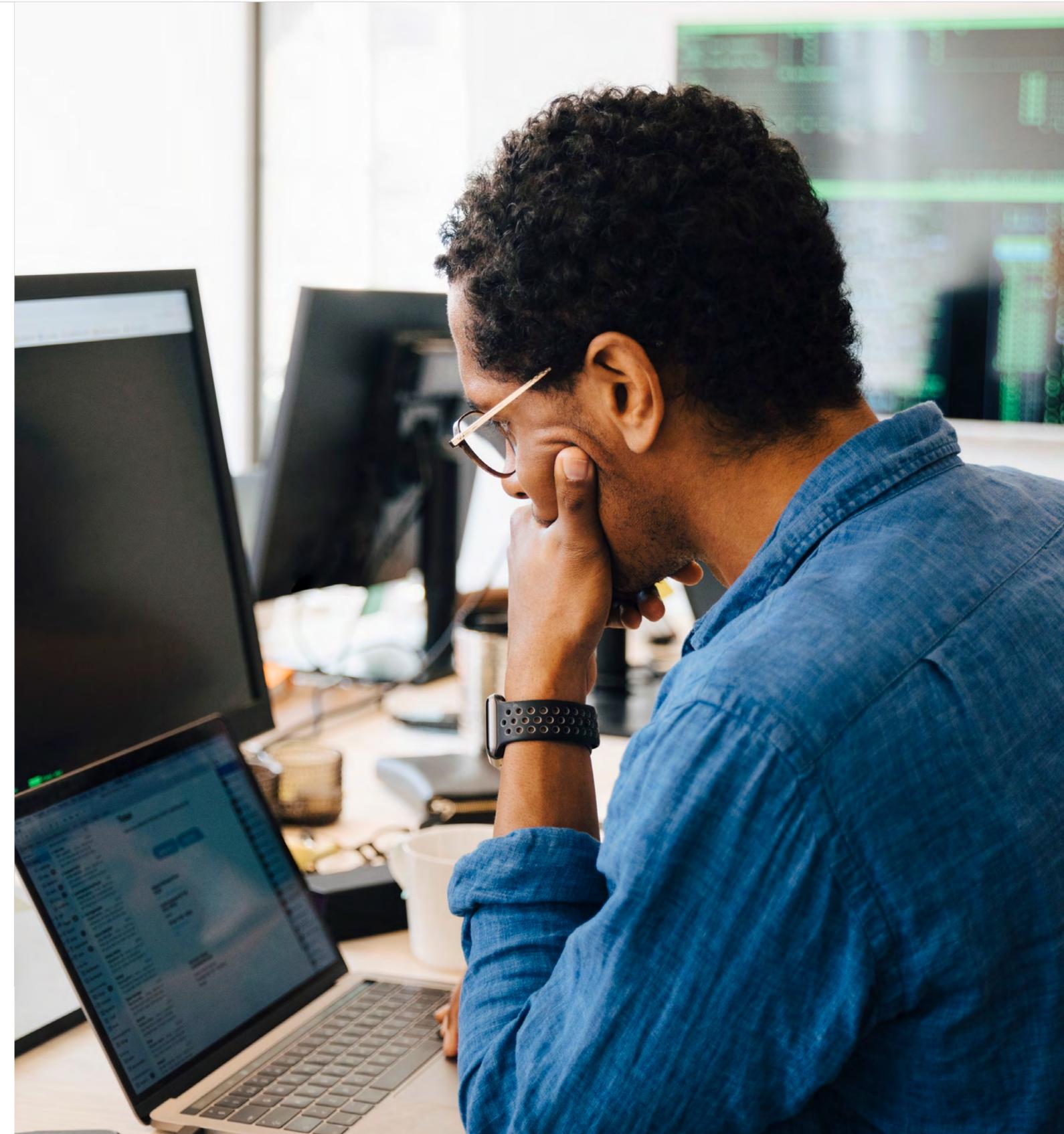
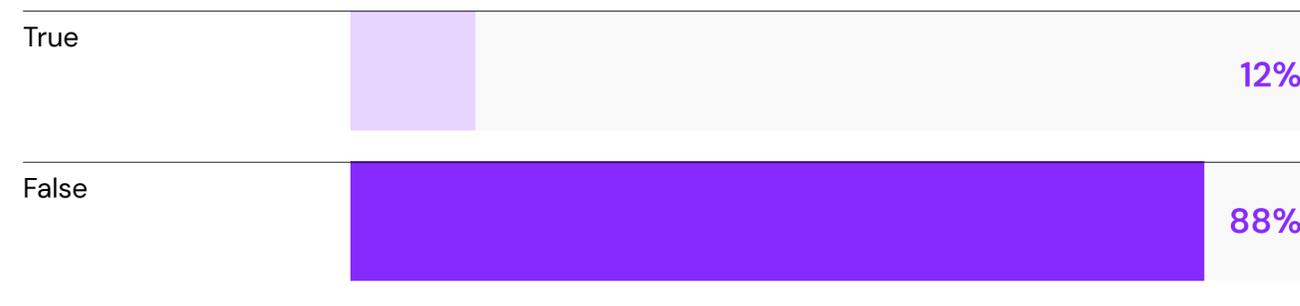
This dimension evaluates the role of data and analytics in shaping customer understanding and marketing strategies. It covers data governance, the use of analytics tools, and how personalization capabilities are leveraged to inform decision-making and enhance engagement.

Personalized and contextual marketing relies on centralized customer data. Disconnected experiences result when customer data is spread across multiple systems and departments. Intelligent Customer Data Platforms (CDPs) are cloud-based software that address this issue by unifying customer data from various sources into a single, comprehensive view. By using streaming data and real-time analytics, these platforms can also support machine learning. This enables businesses to understand and engage their customers more effectively, leading to:

- Personalized marketing
- Improved customer experiences
- Data-driven decision-making

Travel companies possess a wealth of data, including booking history, loyalty program information, and data from IoT devices in hotel rooms. Yet, less than 15% feel they have a single connected view of their customers across touchpoints. The key to success lies in the ability to effectively analyze and act on this data.

**We have a single view of customers across online and offline touch points**



Here are examples of data insights in action:

- **Predictive analytics:** Airlines use AI to anticipate demand spikes and dynamically adjust pricing.
- **Real-time data:** Cruise lines offer tailored activity recommendations based on passenger preferences and onboard behavior.
- **Voice of the customer (VoC):** Proactive feedback loops via in-destination surveys allow brands to resolve issues in real time.

Here are some ways to leverage a modern DXP to enhance digital transformation and customer experiences in the travel and hospitality industry:

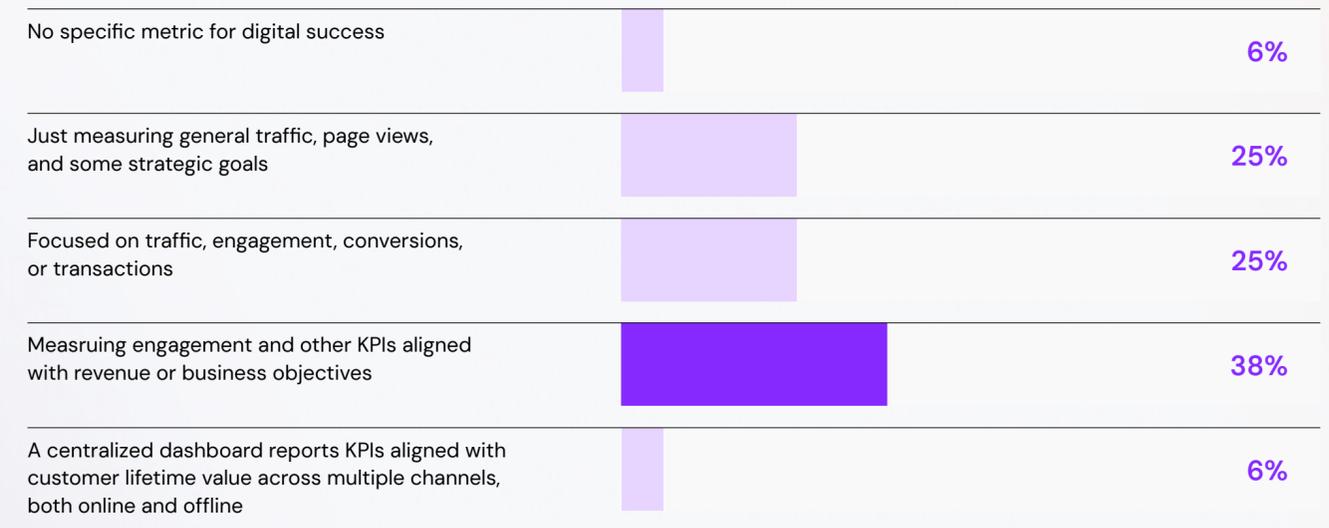
- **Scalability and security:** Choose a secure, scalable infrastructure to comply with regulations and enable trusted digital interactions.
- **Personalization:** Improve engagement and loyalty by personalizing digital experiences at every stage of the customer journey with tailored offers, trip updates, and activity recommendations.
- **Omnichannel delivery:** Power consistent and connected experiences across websites, mobile apps, kiosks, and email platforms.
- **Data-driven insights:** Connected analytics allow travel and hospitality providers to measure engagement, understand behavior, and optimize customer interactions at every stage.
- **Real-time personalization:** Travel customers expect highly tailored and timely interactions throughout their journey. Deliver hyper-personalized experiences through AI-fueled personalization and CDP platforms, consolidating customer data into unified profiles and delivering dynamic offers, recommendations, and content across all touchpoints.
- **Seamless omnichannel delivery:** In today's omnichannel world, travel customers interact with brands through multiple digital and physical platforms. An AI-powered headless architecture ensures consistent, cohesive experiences across all channels.

Challenges in implementing a centralized customer data strategy may include:

- **Fragmented data ecosystems:** Integration challenges between platforms such as booking engines, CRM, and loyalty systems.
- **Data privacy compliance:** Stricter GDPR enforcement raises compliance costs for digital platforms.
- **Lack of internal skills and expertise:** Expertise is needed to manage and integrate the latest AI-powered technologies.
- **Limited data integration:** Difficulties integrating data between systems.

By addressing these challenges, travel and hospitality companies can effectively leverage centralized customer data to deliver personalized experiences, improve customer engagement, and drive business growth.

#### How do you measure digital success

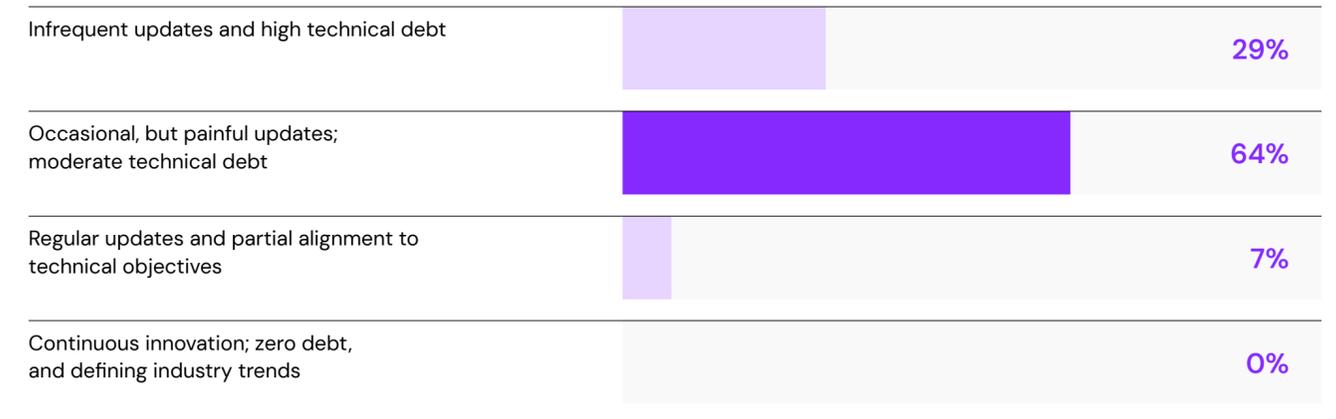


# Technology

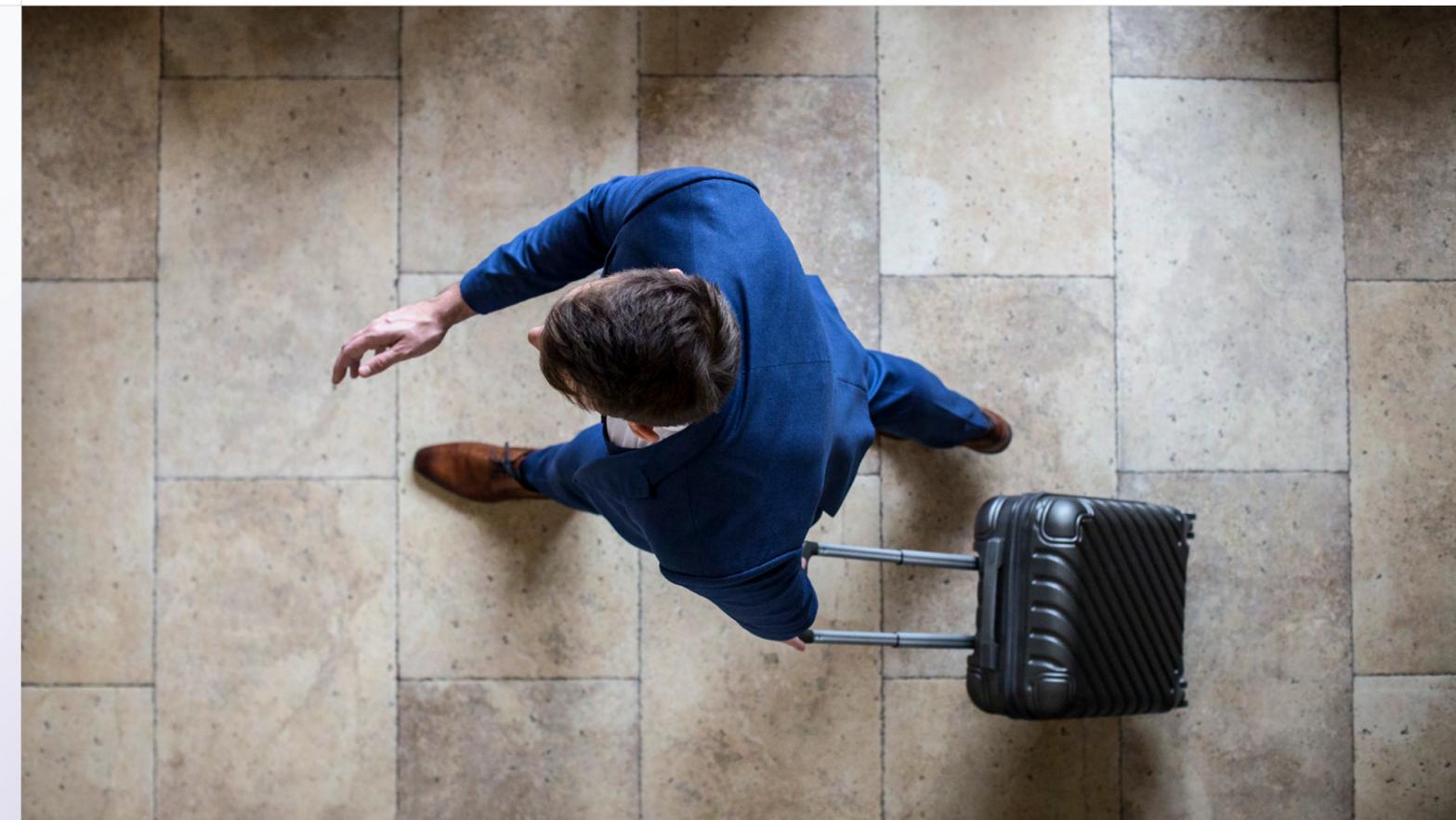
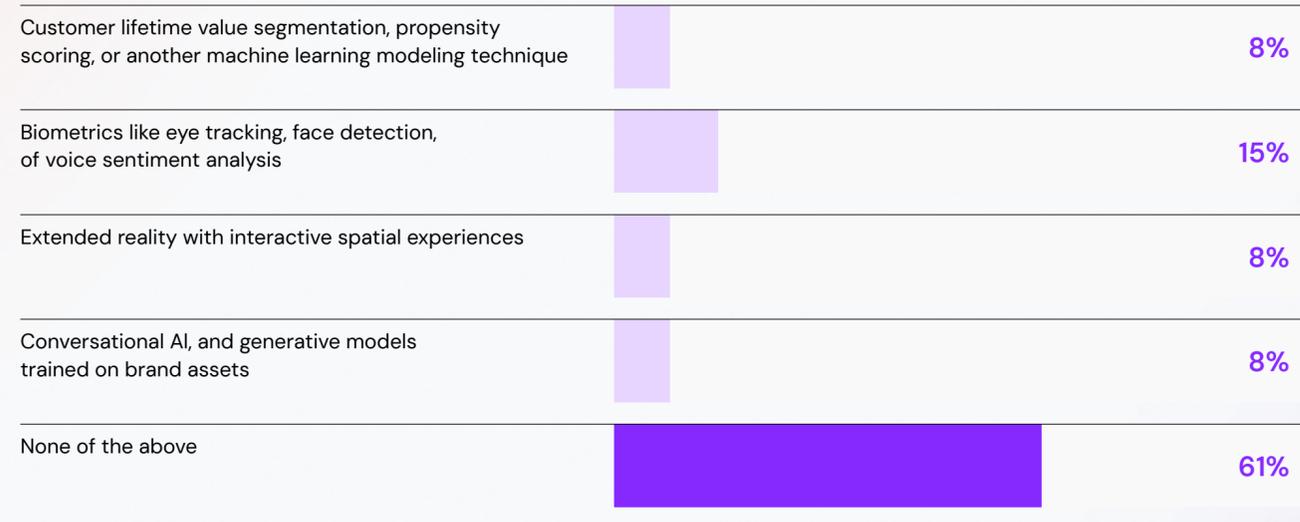
This section focuses on the capabilities of travel and hospitality organizations' martech stacks to remain agile, scalable, and responsive to market demands. Key considerations include the ability to manage software updates efficiently, minimize technical debt, and adapt quickly to industry innovations and customer needs.

A brand's martech stack is a carefully selected collection of software applications used to power marketing efforts. Digital experience leaders curate these tools to enhance team effectiveness, efficiency, and adaptability, integrating them strategically to meet specific objectives and provide seamless experiences for both marketers and customers.

## How frequently do you update your martech tools, and to what extent do upgrades and technical debt impede your current business goals?



## We deliver contextual experiences at scale by leveraging the use of the following emerging technologies



Outdated martech systems can burden developers and technologists with technical debt, complicating upgrades and simple tasks. Cloud services can reverse technical debt by modernizing an organization's data, applications, and infrastructure, increasing agility and innovation. Legacy systems remain a barrier for many travel brands, limiting their ability to innovate. The shift to modern, composable platforms is essential for both scalability and relevance.

Some progressive technologies for the travel and hospitality industry in 2025 include:

- Generative AI to personalize itineraries and automate content creation.
- Digital Twins that simulate destinations, seats, or rooms to showcase experiences to travelers before they book.
- IoT and smart devices that enables hyper-personalized in-trip experiences, from smart luggage tracking to voice-activated concierge services.

Travel brands that invest in modern, cloud-native solutions can cut time-to-market for new experiences by up to 40% while enhancing scalability and customer satisfaction.

To optimize martech:

- Align and roadmap martech strategies with customer experience (CX) goals.
- Use cloud-based, AI-enhanced marketing technology platforms and tools to deliver seamless, personalized experiences.
- Evaluate and update tech stacks to meet future business ambitions.
- Address challenges such as limited data integration and a lack of internal skills by working with external partners.
- Adopt AI-driven loyalty platforms and advanced CRM systems for personalization based on historical travel data.



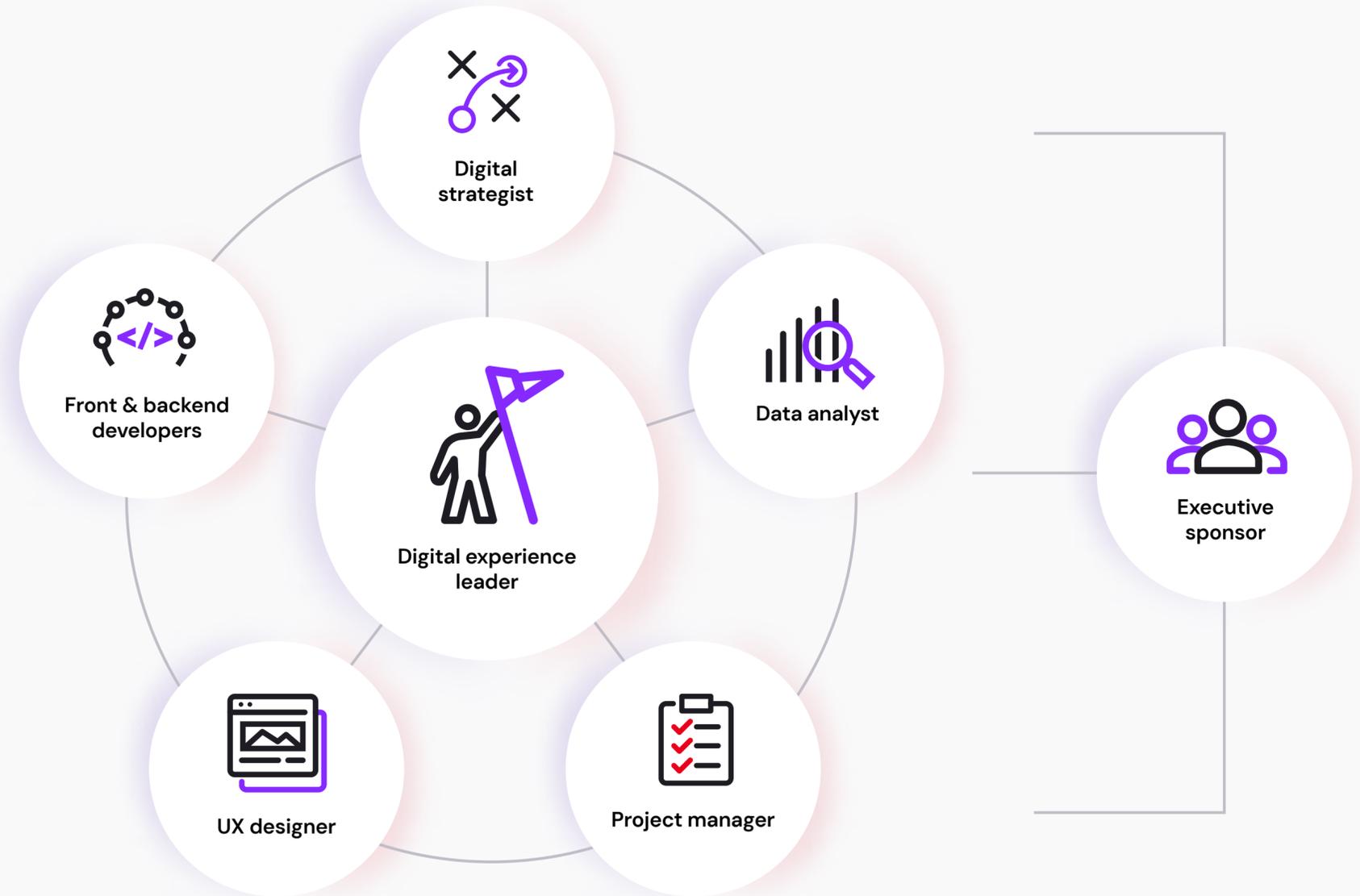
# Culture and organization

This dimension assesses the organizational mindset toward digital transformation, with a focus on leadership, talent, and team alignment. Findings highlight how well teams are equipped and empowered to implement and sustain digital marketing initiatives, showcasing the importance of cultural readiness for long-term success.

Culture and organization are critical for digital experience maturity. Even the best technology will fail without a well-prepared and aligned team. To stay competitive in a rapidly changing environment, leaders must foster a culture that embraces experimentation, cross-departmental collaboration, and customer-centricity.

It is a positive sign that over 75% of executive leaders in the travel and hospitality industry are highly involved in their organization's digital marketing strategy. This involvement ensures leadership support, resource allocation, and strategic alignment.

A streamlined and effective team structure includes six core roles supported by a committed executive sponsor. While the sponsor may not handle daily tasks, their role is critical for removing



**An effective team structure includes six core roles supported by a committed executive sponsor**



obstacles, securing budgets, and championing initiatives. A strong executive sponsor helps drive the vision and ensures alignment across the organization.

To promote collaboration and improve customer experience:

- Ensure that several departments, including marketing, customer service, IT, and operations, are responsible for customer experience (CX).
- Use external partners to liaise between departments and align CX efforts.
- Create unified guest profiles detailing preferences and spending habits to enable targeted marketing.
- Establish consistent workflows across teams and geographies to improve collaboration and governance.
- Leverage AI-driven personalization to deliver tailored offers and recommendations in real-time, enhancing customer experiences across channels.

A digital experience leader is at the core of the team, and is responsible for the experience strategy backlog and digital initiatives. While the roles of the team are essential, the number of people filling them can be flexible. A lean digital team may have individuals taking on multiple roles, while larger organizations might fill each role with specialized team members. To deliver innovative and personalized experiences effectively, it is key to keep the team focused, collaborative, and empowered.

Given post-pandemic lows in marketing budgets, digital marketing teams are being asked to achieve more with less.

## Top marketing priorities



**1. Implementing or leveraging artificial intelligence (AI)**



**2. Engaging with customers in real time**



**3. Improving marketing ROI / attribution**



**4. Creating a cohesive customer journey**



**5. Improving our use of tools and technologies**

Marketing budgets have dropped to an average of 7.7% of total revenue. Marketing leaders face increasing pressure to justify martech investments with a business case that clearly outlines the total cost of ownership and projects a meaningful return on investment.

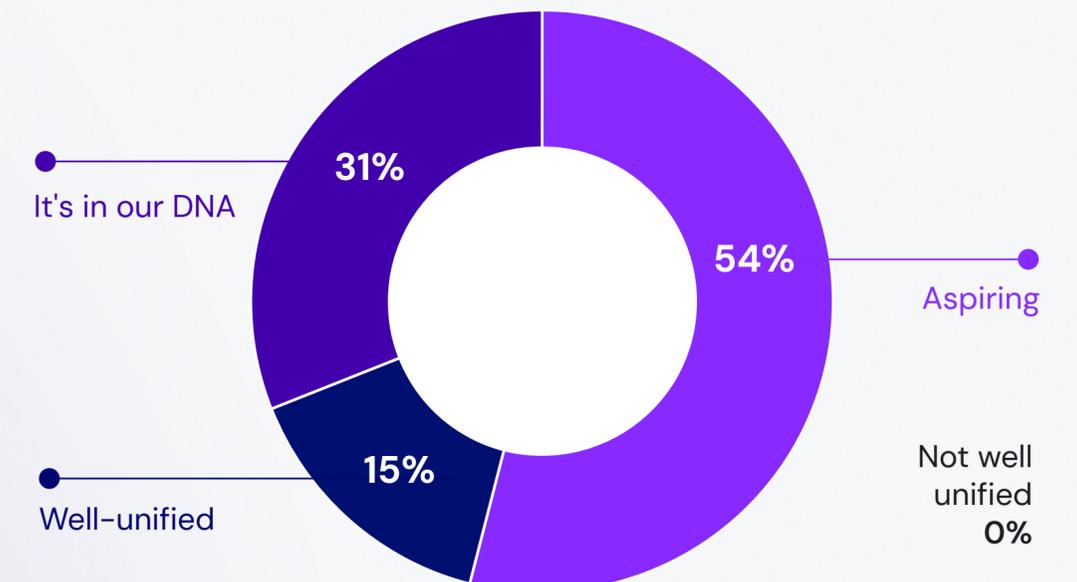
As digital transformation accelerates, marketing leaders must adapt to shifting consumer behaviors and technological advancements. In 2025, Digital Experience (DX) Maturity Leaders will focus on building processes that allow AI and humans to collaborate effectively, establishing paths of digital labor. Marketing leaders will manage teams and oversee an independently active layer of accelerated automated business processes. Companies that harness intelligent capabilities to create innovative workflows that balance human authenticity with artificial intelligence will drive meaningful business value and outpace competitors.

As it relates to artificial intelligence (AI) strategy, common goals, and usage, my company:

<b>Beginning stages:</b> We're in the initial stages of developing an AI strategy, governance and policy. We have begun to explore its potential.		56%
<b>Formative progress:</b> We have set some AI goals, but are still testing and learning the best ways to implement AI solutions		38%
<b>Operational efficiency:</b> Our AI strategy is well-defined, and we've integrated AI into several processes to boost productivity		0%
<b>Advanced integration:</b> Many employees leverage our comprehensive AI systems for decision-making and productivity enhancements		6%



How well is your organization unified in terms of customer-centric strategy?





## Conclusion

Travel and tourism marketers must adopt digital strategies that reflect evolving consumer expectations. By embracing cutting-edge technologies, leveraging robust analytics, and fostering organizational agility, brands can not only meet but exceed the demands of the modern traveler.

As 2025 unfolds, the winners in travel and tourism will be those who combine the power of personalization, authenticity, and sustainability to create experiences that resonate deeply with travelers, building lasting loyalty, and trust.

# About Sitecore

Sitecore is a global leader in digital experience software, trusted by visionary brands like United Airlines, L'Oréal, and Microsoft to power their content lifecycle from content strategy to digital experience delivery. Our composable platform gives marketers and technologists the power to build together at global scale – harnessing content, data, personalization, and AI – to manage digital assets, create engaging content, understand customer intent, and deliver standout experiences across all touchpoints.

Discover more at [sitecore.com](https://www.sitecore.com).