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Data and AI - The Twin Forces Shaping the Future of Travel Marketing



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Foreword by Relay42, a Supermetrics Company

by **Christiaan van der Waal**

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The travel industry has always been a story of connection – between people, places, and possibilities. Yet in recent years, the pace of change has accelerated beyond anything we've seen before. Today, the customer experience is being shaped not by annual trends, but by daily, personalized interactions. Artificial intelligence isn't just another buzzword – it's the engine of a new era where data and AI together redefine how we connect with travelers, personally, intelligently, and in real time.

AI empowers us to move from reacting to predicting, to deepen our understanding of travelers, and deliver truly personalized 1:1 experiences – in the moments they need us most. It allows us to anticipate needs before they're voiced, streamline operations in real time, and reimagine the end-to-end customer journey with unprecedented precision. In doing so, it restores what the travel industry has always been about: creating meaningful, human experiences on a large scale.

Only one in five travel marketers has fully adopted AI – a gap that represents both a challenge and a massive opportunity. Those who fail to act risk being left behind as competitors move from static campaigns to dynamic, data-driven journeys powered by intelligent decisioning. This research shows that leaders are already pairing strong data foundations with AI to shift from descriptive reporting to anticipatory engagement – turning insights into action and delivering experiences that evolve in real time.

Our commitment is to help marketers in the travel and hospitality industry close this gap. We deliver actionable solutions to help marketing teams unify data across channels and systems, and activate it to create meaningful journeys for travelers around the globe.

I strongly believe that the customer journey begins long before bookings, boarding passes, and check-ins. It starts at the spark of inspiration. As leaders in travel and hospitality, we have a choice: to treat AI as a sideline tool or to embrace it as a strategic capability that defines our future. Those who do the latter will not only enhance efficiency but also unlock deeper trust, loyalty, and inspiration among the travelers we serve.

The future of travel will be powered by intelligence – but guided by purpose, insight, and action. Let's lead that journey together.

Executive summary - Redefining the Traveler Experience Through Data and AI

The ability to deliver the right experiences in real time based on a single customer view has become a reality for many travel industry marketers, whether they are working for hotel groups, tour operators, airlines, airports or cruise companies.

This research, carried out by **London Research** in partnership with **Relay42**, a **Supermetrics** company, illustrates and quantifies the competitive advantage enjoyed by those brands with advanced data management.

These travel sector leaders are already excelling in their ability to integrate and enrich data sources, and then to orchestrate marketing programs and personalize interactions based on best-in-class data decisioning and insight capabilities.

But to stay ahead of the game, travel brands need to ensure they are fully harnessing the potential of AI – causal, predictive, agentic and generative – both within the marketing function and across the business. Smarter use of data across commercial activities can further enhance the customer experience, drive sales and reduce costs.

This is supported by our global survey of 200 senior travel marketers which found that **data management leaders are almost three times more likely than mainstream companies to regard AI as ‘mission-critical’ for their future marketing success** (33% vs. 12%).

A fifth of travel companies (21%) say they are already fully exploiting the power of AI **for predictive decisioning and modeling**, an area which is identified in the report as a bridge for more extensive use of AI.

Data management leaders in the travel industry

This research sets out clearly the competitive advantages available for organizations that are able to create and maintain 360-degree customer profiles based on all digital and offline interactions.

These companies have a constantly updating record of all inquiries, quotations and purchases made by an individual prospect or customer, their customer preferences and all their interactions, whether via email, the website, an app, social, or via a contact center or in-trip.

This study shows that data management leaders are excelling across a range of areas that underpin the ability to deliver integrated and personalized marketing in real time.

21%

A fifth of travel companies say they are already fully exploiting the power of AI for predictive decisioning and modeling, an area which is identified in the report as a bridge for more extensive use of AI.

Data sourcing.

Leaders are **three times more likely** to quickly and easily connect new offline and external systems (43% for leaders, compared to only 14% for mainstream companies).

Data delivery and activation.

Leaders are **twice as likely** as mainstream companies to be able to add new customer touchpoints, for example microsites, apps or in-premise kiosks (33% vs. 17%).

Data enrichment.

Leaders are almost **three times more likely** to enrich customer profiles with new attributes and classifications reflecting historic and predicted purchase behaviors, digital engagement, purchase intent, channel preference and brand advocacy (39% vs. 14%).

Decisioning and insights.

Leaders are **twice as likely** to have advanced analytics and automated models based on machine learning to predict future customer behavior, value and purchase intent (36% vs. 17%).

Orchestration.

Leaders are also **twice as likely** (36% vs. 18%) to support advanced journey management to sequence and synchronize customer interactions across all channels.

Personalization.

Leaders are almost **three times more likely** to deliver timely and appropriate responses and experiences based on customer actions and engagement (43% vs. 15%).

People and processes.

Leaders are also **twice as likely** (36% vs. 18% and 36% vs. 19%, respectively) to have high levels of confidence in the quality and productivity of their people (human resources) and processes (workflows).

How AI holds the key to the future of travel marketing

Travel marketing leaders are showing that they are actively, and successfully, addressing strategic data challenges and opportunities. However, they must quickly accelerate their AI capabilities in parallel if they are to continue to drive their businesses forward.

Machine learning and AI are maturing fast, and can enable marketers with a sound strategy and appropriate investment to upscale their insights and decisioning capabilities.

Marketing data management leaders are twice as likely as mainstream companies to say they are already **exploiting the power of AI for predictive decisioning and modeling** (36% vs. 18%).

AI will also play an increasingly important role across other aspects of marketing, including the use of **agentic AI** for marketing orchestration, and generative AI to create the content required at scale for hyper-personalized marketing campaigns.

The power and potential of AI goes beyond marketing. Marketers must understand the broader business context to develop AI strategies that unlock synergies and economies of scale across other business functions including IT, operations, inventory management, finance, risk management and compliance.

Travel companies should focus on building their understanding of how the following key areas of AI can help them build out the right marketing strategies.

Causal and predictive. Understanding why things have happened and forecasting what is likely to happen in the future.

Agentic. Taking autonomous actions within defined process flows.

Generative. Creating new content.

Methodology

London Research carried out a global survey of senior marketers in September 2025. All those surveyed work for organizations with at least \$50M in annual revenues, and are senior-manager level or above. Two-thirds of respondents were at either marketing director, CMO or head of department level. Those surveyed worked across a range of travel sub-sectors including hotel companies, airlines, agency or tour operators, airports and cruise companies. Please see the [Appendix](#) of this report for a full breakdown of respondent profiles.

Section 1

Mapping the Route: Defining the Data Requirements for Marketing Success

For this research we have identified eight core areas of marketing and data maturity. For each of these capabilities we asked participating organizations to indicate their level of maturity on a scale from 'non-existent' to 'advanced', with clear definitions around the criteria for each level of maturity.

Customer experience enablers

1. Holistic customer view
2. Actionable insights
3. Seamless, cross-channel experiences
4. Timely, relevant personalization

Data engine capabilities

1. Data sourcing and importing
2. Data quality, completeness and enrichment
3. Data activation
4. Data operations

The **customer experience enablers** are the 'demand-side' requirements that relate to a travel brand's ability to engage with and market to prospects and customers effectively, while the **data engine capabilities** are the supply-side foundations that underpin effective marketing execution.

The customer experience enablers cover the single customer view, actionable insights, cross-channel marketing and personalization, while the supply-side capabilities relate to data sourcing, data quality, data activation and data operations.

Each overarching category includes two sub-capabilities, for example 'owned media' and 'paid media' under the 'personalization' umbrella, and 'people' and 'processes' for data operations.

To provide some real-world context, let's explore how an airline with advanced data management can surprise and delight travelers through the right use of data, far beyond a basic post-booking email program.

Data sourcing. The airline must be able to pull data from all customer-facing systems, including first-party data from customer services, on-site communities and its Frequent Flier program. It needs second party-data from ancillary service-provider partners (in-airport and offsite), and perhaps third-party data from weather and travel feeds.

Data enrichment. The airline might be modeling new variables such as drive time to the airport, proximity and potential travel delays, or a Frequent Flier points tier threshold to support a broader and deeper customer profile.

Decisioning and insights. The use of advanced analytics to predict customer needs, intent and behaviors is a key requirement. Timely, relevant and personalized interactions are only possible with effective real-time decisioning.

Orchestration. The marketing function needs the ability to schedule a sequence of interactions and messaging based on stated channel preferences, previous channel usage and appropriate responses that address possible travel issues and provide specific advice regarding the availability and location of facilities at the departure airport.

Personalization. Business and leisure travelers increasingly expect pre-emptive and customized travel advice via mobile app push notification. Personalization might involve complimentary lounge access or a flight upgrade, including a personal greeting at the airport check-in and lounge reception to reflect their Frequent Flier points balance.

Defining data management leaders

Progress has undoubtedly been made in the context of the single customer view and the much sought-after 360-degree view of each individual consumer. Separate research carried out by [London Research and Relay42 in 2023](#) found that 16% of organizations reported a ‘non-existent’ single customer view, a state of affairs which no companies have admitted to in our 2025 travel-focused survey (*Figure 1*).

In this report we have identified a group of **data management leaders** based on the extent to which they have ‘a full 360-degree view of the customer’ across both digital and offline channels, and also across business functions such as marketing and sales.

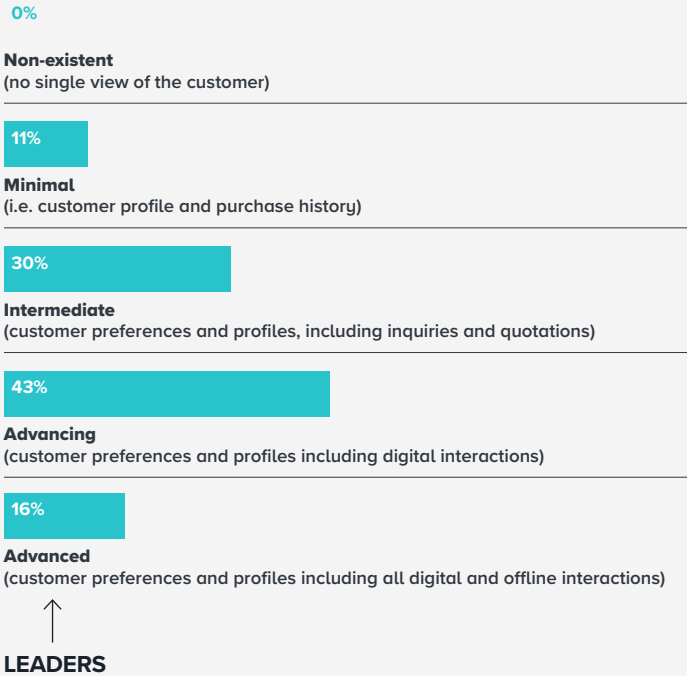
Without a fit-for-purpose data activation platform, travel organizations will struggle to deliver the marketing interactions and experiences customers increasingly expect, whether they are trying to book the holiday of a lifetime, or simply trying to find the best deal for booking a coach or rail ticket for immediate travel.

According to Jad Niciri from [Air France](#):

“At Air France the customer journey is long, it’s complex, and the customer behaviors and needs are going to change a lot depending on the moment of the journey... We needed a complete 360-degree view of the customer so that we can understand the context. Because we are not there to do marketing — we are there to provide a service to the customer, to provide what they need to have, and not just push what we can offer him at all times.”

FIGURE 1

A full 360-degree view of each customer reflecting all customer interactions across all digital and offline channels, and across functions (e.g. sales, marketing, and service/operations).



Section 2

Customer Experience Enablers for Creating Connected Traveler Journeys

Holistic customer view

As described previously, the aspiration for travel marketers should be a 360-degree customer view. Whilst this of course needs to include offline interactions, a key aspect of this capability is having a complete digital profile showing key digital actions and events relating to individuals.

Our research shows that more than half of travel companies surveyed (58%) now have a complete digital profile across the purchase journey based on clickstream data (Figure 2).

Crucially, the difference between 'advancing' (44%) and 'advanced' (14%) is the **ability to create profiles for anonymous non-registered site visitors**, information that can then be appended to the profiles of prospects and customers when they have been identified, and also used to retarget individuals through paid media.

FIGURE 2

A full digital profile of your customers across website, ecommerce, email and app touchpoints.

1%

Non-existent
(only aggregated data)

9%

Minimal
(basic digital profile including key conversion events)

32%

Intermediate
(complete digital profile across purchase journey)

44%

Advancing
(complete digital profile plus granular clickstream data for derived attributes)

14%

Advanced
(complete digital profile including for anonymous/non-registered visitors)



Those companies identified in our research as data management leaders are almost three times as likely to have advanced digital profile capabilities (30%, compared to only 11% for mainstream travel companies, Figure 3).

30%

The percentage of data management leaders with advanced digital profile capabilities.

Actionable insights

The value of data in and of itself can be limited. Survey respondents were asked to rate themselves for both **reporting systems** and **advanced analytics** so we could better understand their ability to derive actionable insights from their data.

Companies have historically been better at gathering data than actually interpreting and actioning this information. Older web analysts will remember when analytics reports used to sit on office shelves gathering dust. Most companies have thankfully now moved from manual data analysis to more sophisticated and instantaneous visualization, as well as automated and predictive analysis tools.

Fewer organizations classify themselves as ‘advancing’ or ‘advanced’ for reporting systems (57%, Figure 4) than for advanced analytics (60%, Figure 5). This is a significant turning point.

FIGURE 3

A full digital profile of your customers across website, ecommerce, email and app touchpoints.
(Leaders vs. mainstream)

● Leaders
● Mainstream

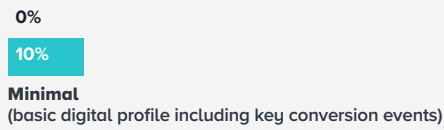
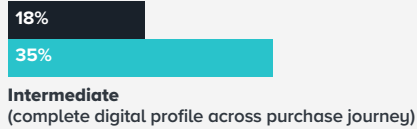
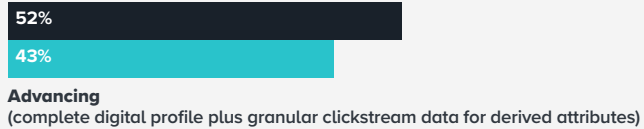
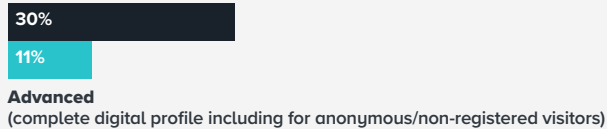
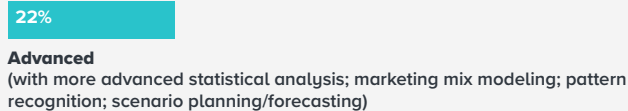
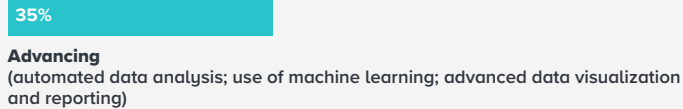
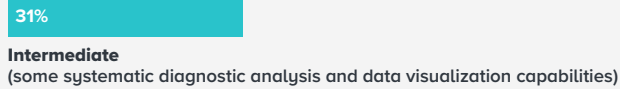
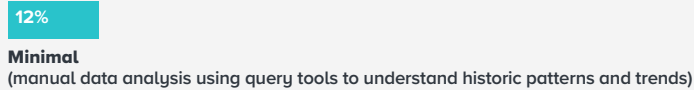


FIGURE 4

A reporting system that allows you to understand customer behavior and campaign performance to support effective decision-making, resource allocation and measurement of marketing ROI.





This research shows, however, that there is still a long way to go. Only a fifth (22%) of travel companies are fully utilizing AI-powered machine-learning technology to turbo-charge the actionability of their data.

As we will see through this report, the future of marketing based on prescriptive analytics, automated cross-channel marketing campaigns and real-time personalized engagements is in some respects already here, but travel brands must ensure that AI is being fully utilized to ensure they are not left behind.

Figure 6 shows that marketing data leaders are more than twice as likely to report advanced use of analytics — including machine learning and statistical analysis — to predict future customer behavior, value and purchase intent based on available customer and marketing data (36% of marketing data leaders vs. 17% of mainstream travel marketers).

FIGURE 5

Ability to leverage advanced analytics (AI, machine learning and statistical analysis) to predict future customer behavior, value and purchase intent based on available customer/marketing data.

16%

Minimal

(basic predictive models, e.g. propensity to purchase; LTV; churn; reactivation; next best product/content)

24%

Intermediate

(advanced predictive models refreshed manually)

40%

Advancing

(advanced predictive models based on machine learning)

20%

Advanced

(automated predictive models based on machine learning)

FIGURE 6

Ability to leverage advanced analytics (AI, machine learning and statistical analysis) to predict future customer behavior, value and purchase intent based on available customer/marketing data. (Leaders vs. mainstream)

● Leaders

● Mainstream

36%

17%

Advanced

(automated predictive models based on machine learning)

Exceptional cross-channel experiences

The growing sophistication of marketing in the travel sector is particularly evident in the area of **cross-channel marketing execution**, for both the orchestration of customer journeys across multiple touchpoints, and the ability to deliver real-time interactions. Effective orchestration of cross-channel marketing requires an alchemy of excellence across three pillars, namely **data**, **decisioning** and **delivery**.

Huge strides have been made by travel marketers as their know-how, aspirations, and marketing technology platforms have advanced considerably in recent years. More fundamentally, painless cross-channel interactions are what consumers expect when they are dealing with travel brands.

For our [previous survey of marketers carried out in 2023](#), well over a third of those surveyed (42%) reported either zero (14%) or basic (28%) capability for ‘fully real-time personalization and decisioning’. For this year’s research, only 10% of marketers reported minimal or non-existent capability for both ‘co-ordination of customer interactions across multiple touchpoints’ (Figure 7), and for ‘timely and appropriate responses and experiences based on customer actions and engagement’ (Figure 9).

22%

The proportion of travel companies that are able to fully orchestrate customer journeys across all digital and offline channels.

FIGURE 7

Coordination of customer interactions across multiple touchpoints and channels to deliver timely, personalized and relevant experiences.

10%

Minimal

(core marketing campaigns with basic sequencing of campaign interactions within each channel)

31%

Intermediate

(core marketing campaigns include basic sequencing of interactions across email, web and ecommerce)

37%

Advancing

(core marketing campaigns include advanced sequencing of interactions across all digital channels)

22%

Advanced

(full orchestration of customer journeys across all digital and offline channels)

FIGURE 8

Coordination of customer interactions across multiple touchpoints and channels to deliver timely, personalized and relevant experiences. (Leaders vs. mainstream)

● Leaders

● Mainstream

36%

18%

Advanced

(full orchestration of customer journeys across all digital and offline channels)



There are significantly more companies at the other end of the maturity spectrum, with data management leaders far more likely to be advanced across both these capabilities. Leaders are twice as likely to fully orchestrate customer journeys across all channels (36% vs. 18%, *Figure 8*) and three times as likely to have advanced real-time response capabilities based on customer actions and engagement (43% vs. 15%, *Figure 10*).

The Netherlands flag-carrier airline **KLM** is a great example of a travel brand that has been able to orchestrate customer journeys more effectively based on smart use of customer data. With the help of Relay42 identity management, its marketing team could recognize whether a search was being made by a prospect or an existing customer, and then interact appropriately via push messaging, display advertising and social media.



FIGURE 9

Ability to deliver timely and appropriate responses and experiences based on customer actions and engagement.

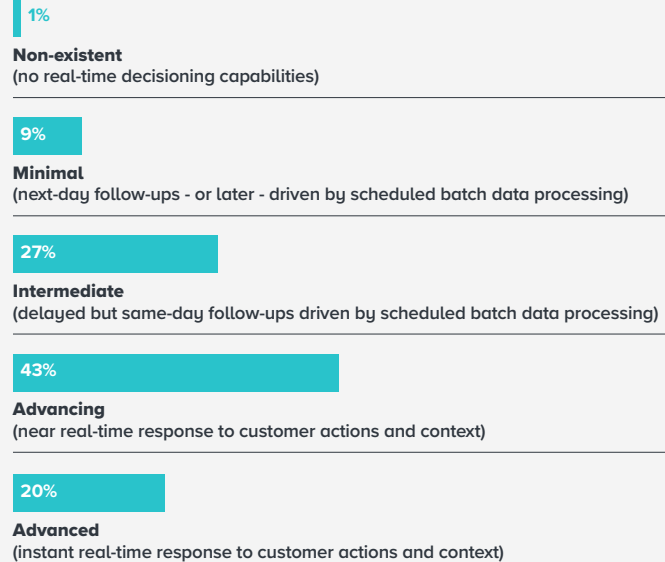
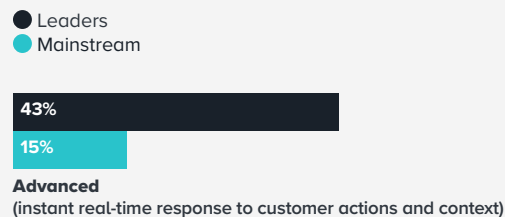


FIGURE 10

Ability to deliver timely and appropriate responses and experiences based on customer actions and engagement. (Leaders vs. mainstream)



43% vs. 15%

Marketing data management leaders are three times as likely as mainstream to have advanced real-time response capabilities.

Timely and relevant personalization

The research shows that advanced personalization is more likely to be happening on owned media than it is on paid media channels where granular targeting based on behavior and attributes is not quite as mature across the travel sector.

Just under two-thirds (61%) of companies surveyed regard themselves as advancing (37%) or advanced (24%) for personalized customer experiences across owned media (Figure 11), while 54% say this is the case for paid media channels (Figure 12).

It makes sense that travel brands initially prioritize their owned channels where they have full ownership and the opportunity to monetize their own user base. But brands should continue to invest in third-party advertising if they can get a healthy return on investment.

Whilst owned media personalization is still ahead of paid media personalization in terms of maturity, there are still more than half (54%) of travel brands taking a relatively sophisticated approach to marketing on third-party websites, defined as using their first-party data to support audience definition and to optimize their paid media marketing.

Better data activation technology, advances in retargeting based on zero-, first- and third-party data and Google's continued support of the third-party cookie from its Chrome browser have all supported this evolution.

The research shows that data management leaders are two-and-a-half times more likely to report advanced offsite and paid-media personalization of the customer experience (Figure 13).

FIGURE 11

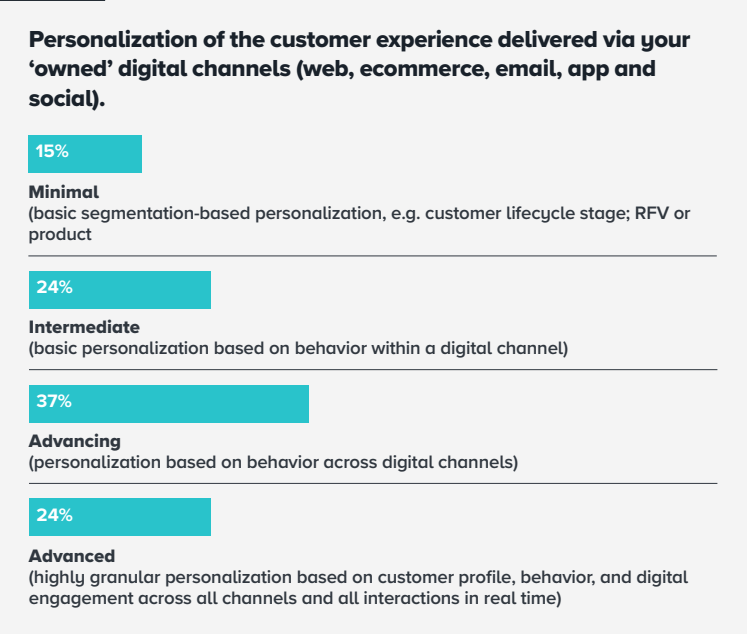
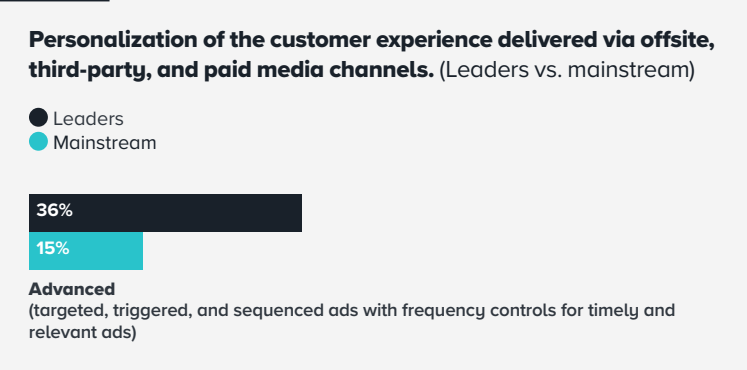


FIGURE 12



FIGURE 13



Capability Maturity Grid: Customer Experience Enablers

	Non-existent	Minimal	Intermediate	Advancing	Advanced
Holistic customer view					
Digital profile	Only aggregated data	Basic digital profile including key conversion events	Complete digital profile across purchase journey	Complete digital profile plus granular clickstream data for derived attributes	Complete digital profile including for anonymous/non-registered visitors
Digital and offline	No single view of the customer	Customer profile and purchase history	Customer preferences and profiles, including inquiries and quotations	Customer preferences and profiles including digital interaction	Customer preferences and profiles including all digital and offline interactions
Actionable insights					
Reporting	Very limited reporting and analysis	Manual data analysis using query tools to understand historic patterns and trends	Some systematic diagnostic analysis and data visualization capabilities	Automated data analysis; use of machine learning; advanced data visualization and reporting	Advanced statistical analysis; marketing mix modeling; pattern recognition; scenario planning/forecasting
Analytics	No predictive models	Basic predictive models, e.g. propensity to purchase; LTV; churn; reactivation; next best product/content	Advanced predictive models refreshed manually	Predictive models based on machine learning	Advanced and automated predictive models based on machine learning
Seamless, cross-channel experiences					
Cross-channel co-ordination	Standalone marketing campaigns supporting one-off interaction	Core marketing campaigns with basic sequencing of campaign interactions within each channel	Core marketing campaigns include basic sequencing of interactions across email, web and ecommerce	Core marketing campaigns include advanced sequencing of interactions across all digital channels	Full orchestration of customer journeys across all digital and offline channels
Dynamic and responsive customer journeys	No real-time decisioning capabilities	Next-day follow-ups - or later - driven by scheduled batch data processing	Delayed but same-day follow-ups driven by scheduled batch data processing	Near real-time response to customer actions and context	Instant real-time response to customer actions and context
Timely and relevant personalization					
Owned media	'One-size-fits-all approach' with no personalized content	Basic segmentation-based personalization, e.g. customer lifecycle stage; recency/frequency/value (RFV) or product purchase	Basic personalization based on behavior within a digital channel	Personalization based on behavior across digital channels	Highly granular personalization based on customer profile, behavior, and digital engagement across all channels and all interactions in real time
Paid media	'One-size-fits-all approach' with no personalized content	Simplistic tailoring of paid ads to broadly defined audiences	Additional personalization based on lifestyle, intent and attitudinal dimensions using third-party platform targeting capabilities	Use of first-party data to support audience definition	Targeted, triggered, and sequenced ads with frequency controls for timely and relevant ads

Section 3

Behind the Booking: The Data Engine Powering Modern Travel Marketing

The marketing capabilities outlined in the previous section can only be achieved with the right ‘supply-side’ data infrastructure and processes. These back-end capabilities are the equivalent of the plumbing and pipes that allow water to flow freely around a building so it is on-tap whenever and where it is needed.

Data sourcing and importing

Companies are more likely to be advanced when it comes to integrating **digital** systems which typically have more user-friendly APIs than **offline or external** systems. Sixty percent of respondents describe themselves as ‘advancing’ or ‘advanced’ for connecting **new digital systems** (Figure 14) compared to 54% for **offline or external systems** (Figure 16).

KLM has recognized the need to have the right data flows available.

Relay42 helped KLM create a data flow setup utilizing a Relay42 tag management system synced with Google Analytics 360 that allows tracking of all customer interactions on the airline’s website and app. The system also tracks relevant indicators from other channels and data sources such as email, social, CRM, call center and affiliates. Data gathered via Relay42’s own tags and DoubleClick Floodlight tags can also be sent from Relay42 to the DoubleClick platform so that relevant ads can be targeted to appropriate audiences.

According to Kevin Duijndam, part of the KLM marketing team:

“We’ve laid the IT data flow foundation in such a way that KLM is now able to execute on our data through all of our digital marketing channels and apply our prediction models at scale. So we can be flexible to plug in other models but can also now scale through other online media channels like search or video.”

FIGURE 14

Ability to add new data and/or connect new digital systems to create a complete profile of your customers online.

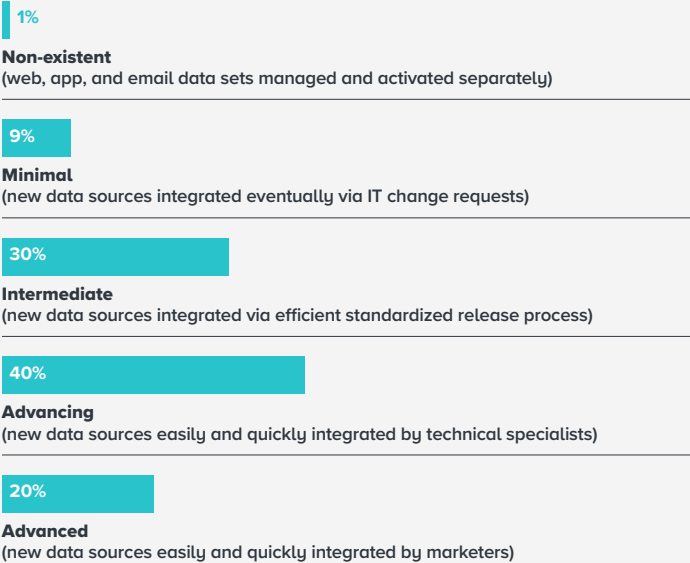
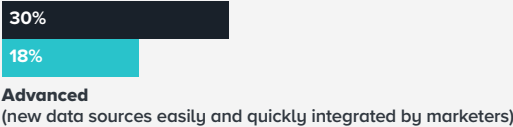


FIGURE 15

Ability to add new data and/or connect new digital systems to create a complete profile of your customers online.

(Leaders vs. mainstream)

- Leaders
- Mainstream





Our research shows that data management leaders are significantly more likely to have advanced data sourcing and data importing capabilities, both for adding **new data or connecting new digital systems** (Figure 15) and for connecting **new offline and external systems** (Figure 17) to create a complete profile of customer interactions and their relationship with the brand.

FIGURE 16

Ability to add new data and/or connect new offline and external systems to create a complete profile of customer interactions and their relationship with the brand.

15%

Minimal

(new data sources integrated eventually via IT change requests)

31%

Intermediate

(new data sources integrated via efficient standardized release process)

35%

Advancing

(new data sources easily and quickly integrated by technical specialists)

19%

Advanced

(new data sources easily and quickly integrated by marketers)

43% vs. 14%

Data management leaders are three times more likely than mainstream companies to be able to integrate new data sources easily and quickly without requiring technical expertise.

FIGURE 17

Ability to add new data and/or connect new offline and external systems to create a complete profile of customer interactions and their relationship with the brand. (Leaders vs. mainstream)

● Leaders

● Mainstream

43%

14%

Advanced

(new data sources easily and quickly integrated by marketers)

Data quality, completeness and enrichment

Successful development of the data value chain needs to be built on the best possible foundations. Before customer-related data can be enhanced and enriched, it needs to be cleansed and deduped as part of the validation process.

The companies classifying themselves as ‘advancing’ in **customer data quality** and completeness (43% of those surveyed, *Figure 18*) are using rules-based matching of records using multiple IDs from different internal and external systems. Only 17% of companies are using advanced probabilistic and predictive matching, though this figure increases to 27% for data management leaders (*Figure 19*).

27%

The proportion of travel leaders using advanced probabilistic and predictive matching for customer data.

FIGURE 18

Confidence in the quality and completeness of customer data across different systems and tools, including compliance with all internal standards and external regulations.

12%

Minimal
(basic rules-based data validation, matching, deduplication, and cleansing)

28%

Intermediate
(more complex and flexible rules-based validation, matching, deduplication and cleansing)

43%

Advancing
(rules-based matching of records using multiple IDs from different internal and external systems)

17%

Advanced
(advanced probabilistic and predictive matching)

FIGURE 19

Confidence in the quality and completeness of customer data across different systems and tools, including compliance with all internal standards and external regulations.

(Leaders vs. mainstream)

● Leaders
● Mainstream

27%

14%

Advanced
(advanced probabilistic and predictive matching)





We also asked survey respondents about their companies' **ability to enrich profiles** with new classifications reflecting historic and predicted purchase behaviors, digital engagement, purchase intent, channel preference, and brand advocacy (*Figure 20*). The difference between the best and the rest is more pronounced for this capability than for basic data quality and completeness, with leaders almost three times more likely than mainstream companies to have advanced enrichment capabilities based on predictive modeling of future intent, behaviors and actions (39% vs. 14%, *Figure 21*).

FIGURE 20

Ability to enrich customer profiles with new classifications reflecting historic and predicted purchase behaviors, digital engagement, purchase intent, channel preference, and brand advocacy.

12%

Minimal

(basic, rules-based enhancement of customer profiles with core variables)

28%

Intermediate

(advanced, rules-based enhancement with additional marketing variables reflecting behaviors, actions and attitudes)

43%

Advancing

(with the ability to derive and append new variables easily)

17%

Advanced

(with predictive modeling of future intent, behaviors and actions to enhance customer profiles)

39% vs. 14%

Data management leaders are almost three times as likely as mainstream companies to have advanced data enrichment capabilities.

FIGURE 21

Ability to enrich customer profiles with new classifications reflecting historic and predicted purchase behaviors, digital engagement, purchase intent, channel preference, and brand advocacy. (Leaders vs. mainstream)

● Leaders

● Mainstream

39%

14%

Advanced

(with predictive modeling of future intent, behaviors and actions to enhance customer profiles)

Data activation and export

The ability of marketers to deliver cross-channel and personalized experiences outlined in the **customer experience enablers** section of the report is also very much contingent on the contact **trigger and personalization rules** that ultimately drive the company’s **data engine capabilities**.

The distinguishing characteristic of advanced companies in this context (amounting to 19% of organizations) is the use of **predictive models and machine learning** to drive seamless and cross-channel personalization in real time (Figure 22).

Companies at the level below (‘advancing’) do have a central decision engine in place, but marketing is still very much rooted in pre-defined business rules rather than purely AI-driven automation.

19%

Less than a fifth of travel companies are using predictive models and machine learning to drive seamless and cross-channel personalization in real time.

FIGURE 22

Ability to set up and refine cross-channel contact trigger and personalization rules to enhance the customer experience and optimize campaign performance.

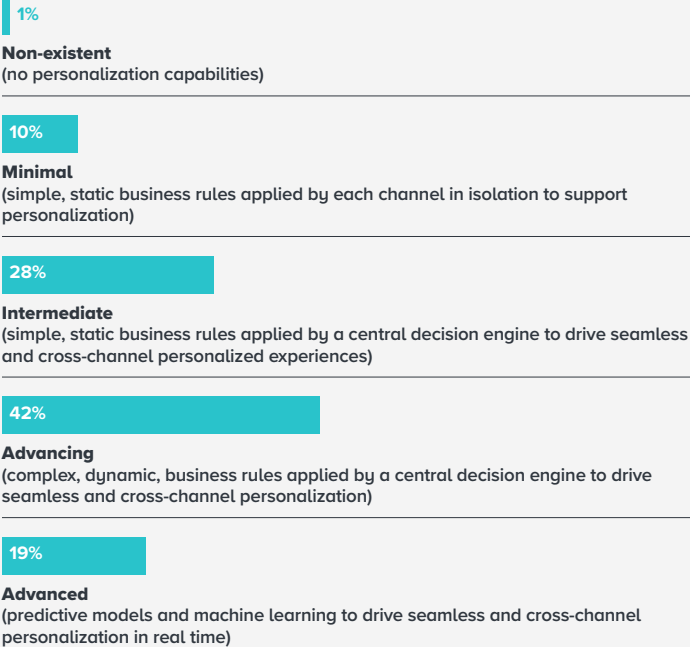
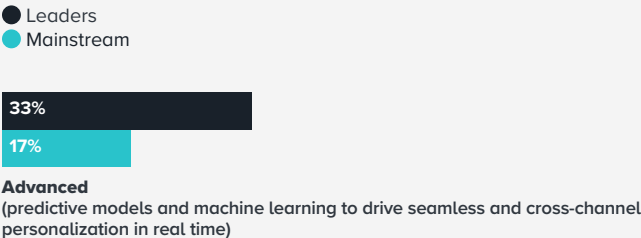


FIGURE 23

Ability to set up and refine cross-channel contact trigger and personalization rules to enhance the customer experience and optimize campaign performance. (Leaders vs. mainstream)



Best-in-class data activation also entails the **ability to accommodate the data requirements of new media and content delivery opportunities** to support new channels, for example a new microsite (*Figure 24*). For both these capabilities, leaders are around twice as likely as mainstream companies to have advanced capabilities (*Figure 23* and *Figure 25*).

FIGURE 24

Ability to accommodate the data requirements of new media/content delivery opportunities (e.g. a new microsite) to support new channels.

1%

Non-existent

(web, app, and email operated as standalone data sets)

10%

Minimal

(new data end points integrated eventually via IT change requests)

33%

Intermediate

(new data end points integrated via efficient standardized release process)

37%

Advancing

(new data end points easily and quickly integrated by technical specialists)

19%

Advanced

(new data end points easily and quickly integrated by marketers)

33% vs. 17%

Data management leaders are twice as likely as mainstream companies to easily accommodate the data requirements of new media and content delivery opportunities.

FIGURE 25

Ability to accommodate the data requirements of new media/content delivery opportunities (e.g. a new microsite) to support new channels. (Leaders vs. mainstream)

● Leaders

● Mainstream

33%

17%

Advanced

(new data end points easily and quickly integrated by marketers)

Data operations (people and processes)

The final area of data engine capabilities relates to people and processes, defined as ‘right-sized and future-proofed human resources’ and ‘a marketing operations model that is efficient and productive in terms of process, methods and workflow’.

What does good look like in this context? In terms of human resources, advanced companies are characterized by a central and strategic data team, an executive sponsor, and a direct link to commercial strategy.

21%

Around a fifth of companies have advanced capabilities in the context of human resources, including a central and strategic team and direct link to commercial strategy.

FIGURE 26

Right-sizing and future-proofing human resources within the marketing function.

12%

Minimal
(good level of data skills in the business but siloed resources)

22%

Intermediate
(good co-ordination of data resources across channels and functions)

45%

Advancing
(high levels of data expertise and seamless management of data across all digital channels)

21%

Advanced
(central and strategic data team; executive sponsor; direct link to commercial strategy)

FIGURE 27

Right-sizing and future-proofing human resources within the marketing function. (Leaders vs. mainstream)

● Leaders
● Mainstream

36%

18%

Advanced
(central and strategic data team; executive sponsor; direct link to commercial strategy)





Comparison of *Figure 26* and *Figure 28* shows that companies are more likely to be advancing or advanced in terms of their human assets and organizational structure (66%) than for processes and methods (61%). 'Advanced' in this operational context is defined as an 'enterprise-wide and data-first approach to data governance and management'.

Data management leaders are twice as likely (36% vs. 18% and 36% vs. 19%) to have high levels of confidence both for the quality and productivity of their people (i.e. human resources, *Figure 27*) and also for their processes and workflows (*Figure 29*).

FIGURE 28

Efficiency and productivity of current marketing operations model in terms of process, methods and workflow.

11%

Minimal

(channel-led approach to data governance and management)

28%

Intermediate

(cross-channel approach to data governance and management)

39%

Advancing

(strategic approach to data governance and management)

22%

Advanced

(enterprise-wide, data-first approach to data governance and management)

36% vs. 19%

Leaders are almost twice as likely as mainstream companies to have an enterprise-wide and data-first approach in the context of processes and workflows.

FIGURE 29

Efficiency and productivity of current marketing operations model in terms of process, methods and workflow.

(Leaders vs. mainstream)

● Leaders

● Mainstream

36%

19%

Advanced

(enterprise-wide, data-first approach to data governance and management)

Capability Maturity Grid: Data Engine Capabilities

	Non-existent	Minimal	Intermediate	Advancing	Advanced
Data sourcing & importing					
Digital	Web, app, and email data sets managed and activated separately	New data sources integrated eventually via IT change requests	New data sources integrated via efficient standardized release process	New data sources easily and quickly integrated by <u>technical specialists</u>	New data sources easily and quickly integrated by <u>marketers</u>
Offline	Data sets managed and activated separately	New data sources integrated eventually via IT change requests	New data sources integrated via efficient standardized release process	New data sources easily and quickly integrated by <u>technical specialists</u>	New data sources easily and quickly integrated by <u>marketers</u>
Data quality, completeness & enrichment					
Data quality and consolidation	Data as supplied	Basic rules-based data validation, matching, deduplication, and cleansing	More complex and flexible rules-based validation, matching, deduplication and cleansing	Rules-based matching of records using multiple IDs from different internal and external systems	Advanced probabilistic and predictive matching
Event modeling and enrichment	No enrichment of the master customer record	Basic, rules-based enhancement of customer profiles with core variables	Advanced, rules-based enhancement with additional marketing variables reflecting behaviors, actions and attitudes	As previous, with ability to derive and append new variables easily	As previous, also with predictive modeling of future intent, behaviors and actions to enhance customer profiles
Data activation					
Decisioning	No personalization capabilities	Simple, static business rules applied by each channel in isolation to support personalization	Simple, static business rules applied by a central decision engine to drive seamless and cross-channel personalized experiences	Complex, dynamic, business rules applied by a central decision engine to drive seamless and cross-channel personalization	Predictive models and machine learning to drive seamless and cross-channel personalization in real time
Activation	Web, app, and email operated as standalone data sets	New data end points integrated eventually via IT change requests	New data end points integrated via efficient standardized release process	New data end points easily and quickly integrated by <u>technical specialists</u>	New data end points easily and quickly integrated by <u>marketers</u>
Data operations					
People	Limited and fragmented data skills and bandwidth in marketing and IT	Good level of data skills in the business but siloed resources	Good co-ordination of data resources across channels and functions	High levels of data expertise and seamless management of data across all digital channels	Central and strategic data team; executive sponsor; direct link to commercial strategy
Processes	Tactical and ad hoc approach to data governance and management	<u>Channel-led</u> approach to data governance and management	<u>Cross-channel</u> approach to data governance and management	<u>Strategic</u> approach to data governance and management	<u>Enterprise-wide, data-first</u> approach to data governance and management

Section 4

AI in Command: Travel Marketing's New Mission Control

This research shows how early adopters are using predictive AI to support common marketing use cases such as propensity to purchase, lifetime value, churn, reactivation, next best product or content.

A fifth of travel companies (21%) say they are already fully exploiting the power of AI for predictive decisioning and modeling, while a further 51% say they have made a start in this area (*Figure 30*). Data management leaders are twice as likely as mainstream companies to say they have advanced capabilities (36% vs. 18%, *Figure 31*).

Predictive marketing based on machine learning became widespread before GenAI and serves as the beachhead for full-scale AI expansion. Although this AI-powered approach, which is built on understanding past events, is a foundational technology for data-driven marketing, there are other emerging categories of AI that are also proving to be game-changers for the marketing function.

Agentic AI is designed to act autonomously. By using machine learning and LLMs, it can make decisions, execute multi-step goals, and orchestrate cross-channel campaigns with limited human supervision, effectively turning insights into continuous, adaptive action.

Generative AI (GenAI), conversely, is all about creation. Typically powered by LLMs for text and diffusion models for visuals, it enables the rapid, large-scale creation of new content and assets, meeting the crucial need for rich and personalized content at scale.

The potential of AI is something that data management leaders are acutely aware of. Another key finding of our research is that these leaders are almost three times more likely than other companies to regard AI as 'mission-critical' to their future marketing success (33% vs. 12%, *Figure 32*).

FIGURE 30

Is your marketing function using AI for predictive modeling?

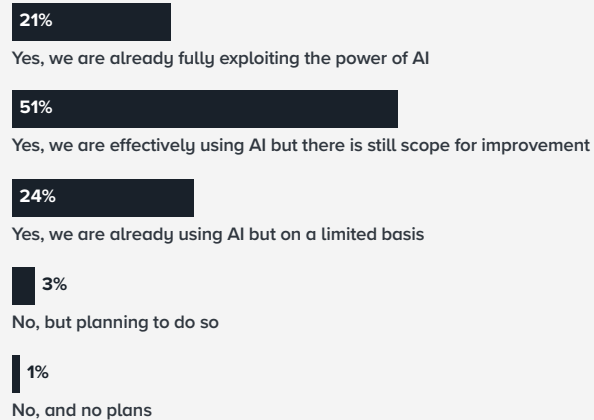


FIGURE 31

Is your marketing function using AI for predictive modeling? (Leaders vs. mainstream)

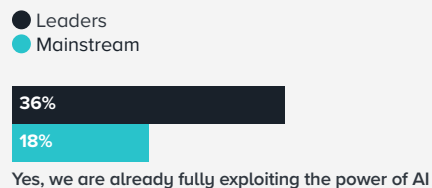
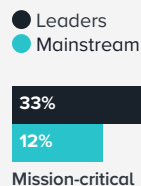


FIGURE 32

How important is AI to your future marketing success? (Leaders vs. mainstream)



From Barrier to Bridge

The successful adoption of advanced AI is currently held back by three dominant organizational hurdles (*Figure 33*).

Technology platform limitations, reported by 50% of respondents, often involve the complexity of integrating AI into legacy systems and achieving the necessary computing power, while a knowledge shortfall (47%) speaks to the lack of in-house skills to build, deploy and manage AI.

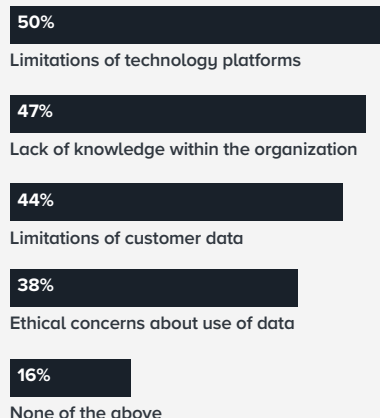
The third major barrier comes in the form of customer data limitations (44%). As this report outlines in detail, it is essential that the right data foundations are in place. AI models, especially those used for predictive analytics and personalization, are only as good as the data they are trained on.

Customer data limitations refer not just to a lack of data, but to issues such as data quality (inconsistent, inaccurate, or incomplete records), data fragmentation (information trapped in siloed systems like CRM, web analytics, and marketing automation), and accessibility. A data landscape that is messy, inconsistent, or hard to access can sabotage an AI initiative before it can even begin.

Overcoming this requires a strategic investment in data unification and governance. This means breaking down organizational and technical silos to create a single, comprehensive view of the customer. Only with this robust, high-quality data pipeline can AI systems truly deliver on their promise of accurate predictions, deep personalization, and continuous adaptive action.

FIGURE 33

What are the barriers to better use of AI?



44%

Customer data limitations are a top-three barrier to better use of AI in the travel industry, along with technology and knowledge shortfalls.



Section 5

Conclusion – An AI-Driven Future Built on Data

Travel marketers are showing that they are actively, and successfully, addressing strategic data challenges and opportunities. They must quickly replicate this for AI if they are to continue to carry their businesses forward through delivery of exceptional customer experiences.

The power and potential of AI goes beyond marketing. Marketers must understand the broader context and develop AI strategies that unlock synergies and economies of scale across other business functions such as IT, operations, inventory management, finance, risk management and compliance.

Pursuing the AI prize in this holistic manner can elevate marketers to a more strategic role across the business, whilst also helping to break down the business silos that can lead to disjointed experiences.

Developing a more granular understanding of AI will be vital in this regard. A useful first step for travel companies is to develop their own high-level taxonomy for different forms of AI to help understand how they can positively impact their business.

Causal. Understanding why things have happened.

Predictive. Forecasting what is likely to happen in the future.

Agentic. Taking autonomous actions within defined process flows.

Generative. Creating new content to deliver personalized marketing programs.

An integrated approach to AI across different areas of marketing can accelerate knowledge sharing and rapid adoption of best practices across marketing departments, wider business functions and third-party agency or technology partners.

The areas of marketing capability covered in this report are all complex, multi-stage and labor-intensive process flows making them obvious candidates for agentic AI:

Data management (sourcing, cleansing, validating, de-duping, compliance, enrichment, distribution).

Journey orchestration (goals, KPIs, insights, audience, calls-to-action, rules & conditions, experience, recommendations, measurement).

Reporting (business goals, metrics/KPIs, benchmarking, context, trends and patterns, visualization, recommendation, distribution).

Analytics (business goal, target data, data prep, data enhancement, analysis/model building, validation, insights, actions).

With agentic AI deployed in a co-ordinated manner across each capability area, one-to-one personalization becomes possible at every single customer touchpoint. The potential benefits of such an approach are widespread with use cases ranging from virtual travel agents and translation to customized recommendations, dynamic pricing, weather predictions and even fraud detection.

None of these individual marketing and business applications are a silver bullet for marketers. The craft of marketing is synthesizing different tactics and use cases into a compelling brand, product, service and value proposition that stands out from the competition.

Looking ahead

A subtle, but fundamental, point to appreciate is that agentic AI goes way beyond traditional marketing automation workflows. It refers to AI systems that exhibit agency—the ability to proactively make decisions, set goals, and adapt strategies based on changing inputs. These are not just reactive tools; they are autonomous agents capable of operating with a degree of self-direction, often across complex and dynamic environments.

The future of travel marketing will be forged by autonomous agents: managing data; performing advanced analytics; building and refining multichannel campaigns incorporating real-time personalization; holistically reporting performance and then refining each of these aspects based on customer behaviors.

This brave new world of hyper-personalized communications will be data-driven, but it will also be content-hungry. The personalized interactions across digital (connected TV; digital radio; web, mobile, app; social and email) and offline (in-store; front desk; in-flight/on-board/on-premise) require collateral to engage the consumer and deliver the brand experience.

Fortunately, the arrival of GenAI can remove the constraints of traditional production processes to support highly automated content creation to underpin the composition and delivery of the content at the relevant customer touchpoint.

The rapid development and deployment of all forms of AI means that the future is now. Understandably, much of the attention is focused on the transformative power of AI, business justification for investment, rapid technological development and exciting use cases.

Senior travel marketers need to see beyond this noise and focus on the fundamentals for success, with data at the core of AI strategies.

AI agents will become the main applications that consume customer and marketing data. As the old saying goes “Garbage in, garbage out”. So their success will depend upon the sourcing, refinement and distribution of that precious raw material to drive the AI engine of marketing success.

The AI revolution will get the headlines, but any success it achieves will be built on the data infrastructure that underpins it.

Section 6

Key Takeaways - The Playbook for Data-Driven Travel Marketing Leaders

What travel marketing leaders do differently to excel:

1. Build and Maintain a 360-Degree Customer View

- Integrate digital and offline data into unified customer profiles. Identity resolution is a critical data management capability.
- Track all interactions (inquiries, purchases, service touchpoints, loyalty data). Zero-party data collected via chatbots and virtual assistants represent a huge opportunity.
- Enrich profiles with behavioral, attitudinal, and predictive attributes to drive audience segmentation and personalization.

2. Turn Data into Actionable Insights

- Use advanced analytics and machine learning to predict future behavior, value, and purchase intent.
- Move from descriptive reporting to predictive and prescriptive insights.
- Continuously feed insights into marketing decisioning to create a closed-loop cycle (test-measure-refine) of continual improvement.

3. Deliver Seamless Cross-Channel Journeys

- Orchestrate interactions across every channel (email, app, social, web, offline) to deliver 'joined-up' experiences.
- Use real-time decisioning to co-ordinate: timing, relevance, frequency and sequencing of interactions.
- Focus marketing resources on the 'moments of truth/must-win battles' in the customer purchase journey.

4. Personalize at Scale

- Use first-party and behavioral data for hyper-targeted content and offers. Personalized recommendations are now expected by travelers.
- Prioritize personalization across owned media first, expanding to paid channels. Greater engagement and data capture will create a virtuous circle consisting of: data capture, behavioral insights, personalization.
- Automate dynamic content and fulfillment based on customer context. Travel consumers are typically information- and content-hungry, particularly when researching, actively considering and configuring their potential purchase.

5. Invest in Strong Data Infrastructure

- Enable rapid connection of new data sources and systems.
- Maintain high-quality, clean, and compliant customer data.
- Support marketers (not just IT teams) in activating and managing data directly.

6. Strengthen People and Processes

- Establish centralized data teams with executive sponsorship.
- Align data and marketing operations to commercial strategy.
- Foster enterprise-wide data governance and collaboration.

7. Harness AI to Drive Business-Wide Intelligence

- Use predictive AI to forecast behaviors and guide marketing decisions.
- Apply agentic AI for autonomous orchestration and workflow optimization.
- Leverage generative AI for scalable, personalized content creation.
- Integrate AI strategies across marketing, IT, operations, finance, and compliance to improve both customer experience and organizational efficiency.

Appendix

Respondent profiles

FIGURE 34

In which region are you based?

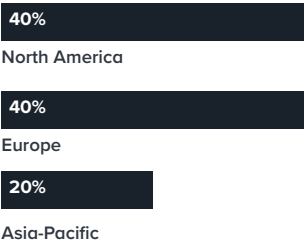


FIGURE 37

What is your annual company revenue?

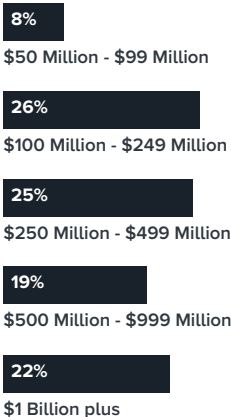


FIGURE 35

In which country are you based? (Europe)

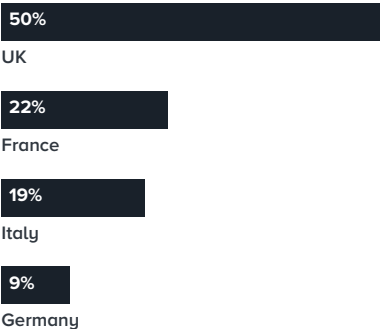


FIGURE 36

In which country are you based? (Asia)

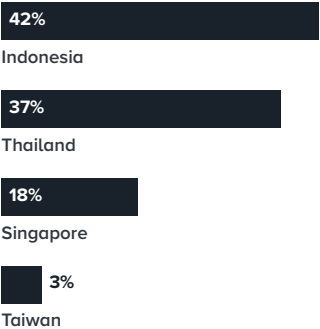


FIGURE 38

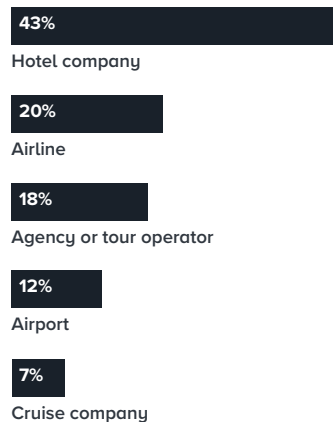
What type of travel company do you work for?

FIGURE 39

Which areas of your company's marketing activities are you involved with?

FIGURE 40

Which of the following best describes your level of responsibility?

About us



Research
Powered
Content

London Research produces insight-driven content for B2B professionals, helping them make better, more informed decisions. Our clients are typically market-leading international technology businesses and global agencies. We help them tell compelling stories based on robust research and insightful data points. As part of Demand Exchange, not only do we create valuable content, we're able to syndicate it so that it informs buyers and aids their decision making at every stage of the customer journey.

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About Relay42, a Supermetrics Company

Relay42 empowers businesses to create meaningful customer relationships by utilizing smart technology to transform fragmented interactions into seamless journeys. Relay42 gives businesses the freedom, flexibility, and agility to build sustainable customer relationships, using valuable customer data as a baseline. Global brands, including Air France, KLM, and Levi's, rely on Relay42 to anticipate and address customer needs in real time across all online and offline channels. In June 2025, Relay42 was acquired by Supermetrics, joining the leading Marketing Intelligence Platform that empowers marketers to seamlessly connect data, customer behavior, and business impact.

supermetrics.com/platform/activate-data

About Supermetrics

Supermetrics is the leading Marketing Intelligence Platform, fueling insights for 200,000+ companies in 120 countries. By simplifying data integration and management, Supermetrics empowers businesses to become data-informed, turning insights into growth-driving decisions. Analyzing 15% of global ad spend, Supermetrics enables brands and marketing agencies to navigate privacy-first analytics with confidence. Founded in 2013, the Helsinki-based scale-up has 360+ employees worldwide, partnering with businesses to scale their marketing efforts and maximize the value of their data.

supermetrics.com

About the authors

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A marketer at heart but with a passion for designing and delivering technology-led marketing solutions that add value for consumers and deliver competitive advantage (and profits) to brand owners. Andrew has more than 25 years of experience leveraging technology to deliver marketing goals, including executive management roles both client-side and supply-side.

He has a proven track record helping to grow brands and businesses, translating marketing theory into improved bottom-line performance, developing marketing strategy, and delivering high-payback marketing programs.

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A renowned marketing technology industry analyst who has spent more than 20 years producing content for companies such as Adobe, Microsoft, Oracle and Salesforce.

He co-founded London Research in 2017 after previously leading and building the research function at Econsultancy where he oversaw the publication of hundreds of research-based reports.

Linus is also a sought-after speaker for webinars and events internationally, and has previously worked as a newspaper journalist and for a market research consultancy.

