

The Future of the Digital User Journey For Tourists

An Evolution between 2025 & 2030

A Research by the Digital Tourism Think Tank

Part 1
Introduction

Methodology
Part 2

Part 3
Conclusions

Suggestions &
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Part 4

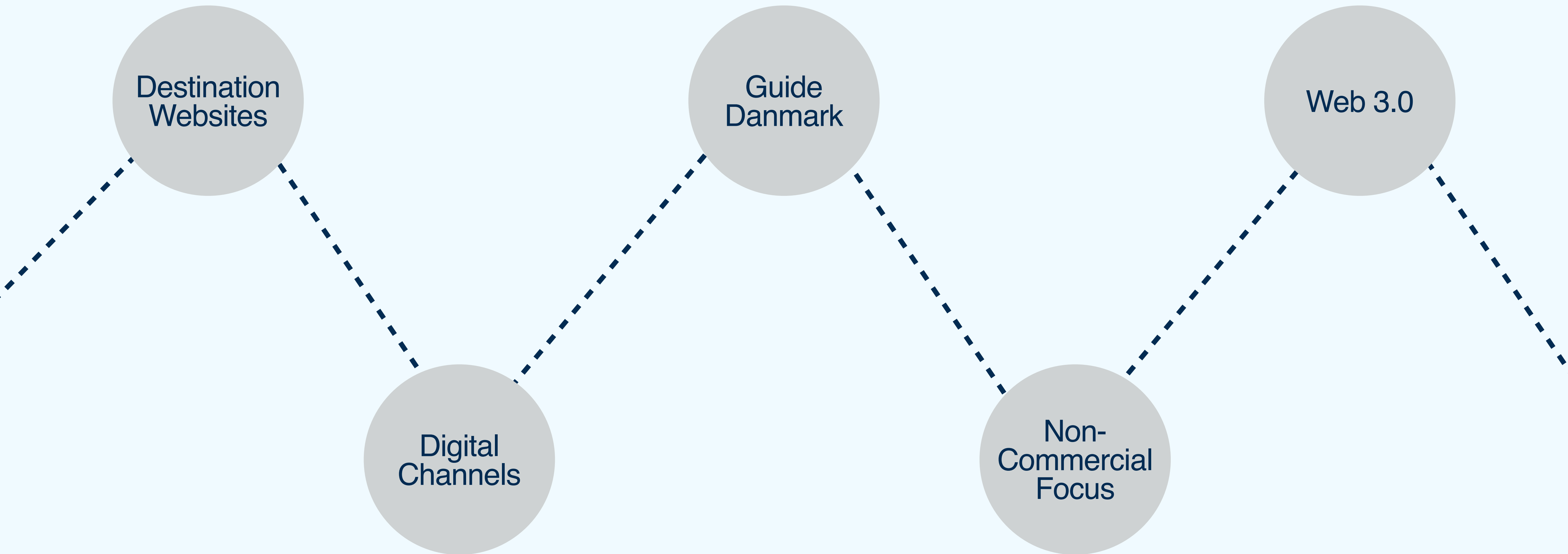
Part 1
Introduction

The Digital User Journey

Technology is constantly **changing travellers' habits**, which impacts their digital journey, calling for an update in habits, planning and targeting of visitors.



5 Hypotheses



Part 2
Methodology

3-Phase Methodology



Data Collection & Analysis



Desk Research



Design-Led Workshops



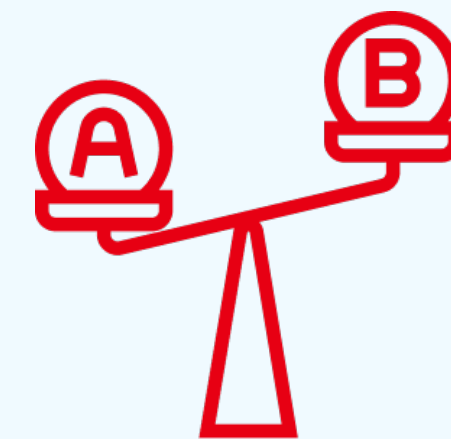
Digitalisation Expert Panel



Digital Leaders Panel



Stakeholder Interviews



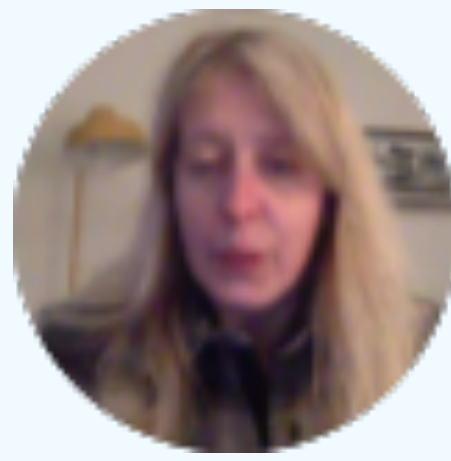
Digital Audit & Benchmark

Data Collection & Analysis

Workshops, Panels and Interviews

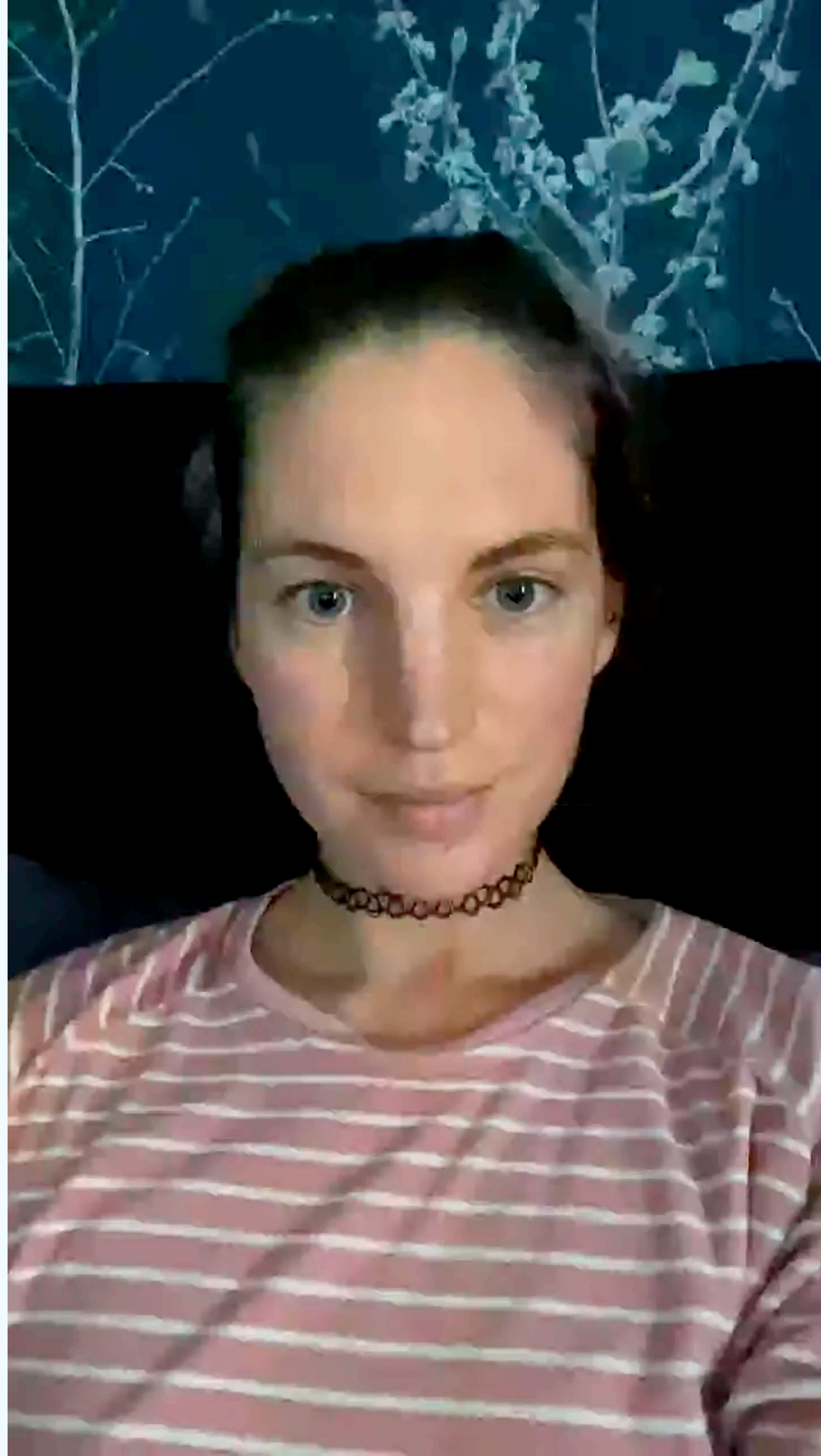
- VisitDenmark Team
- **19** Danish DMOs invited
- **10** International DMOs Experts
- **5** Industry Experts

Knowledge Validation



Consumer Video Panel & Survey

- **+1,000 Individuals Reached**
- **107 Surveys Completed**
- **48 Nationalities**
- **39 Consumer Videos**





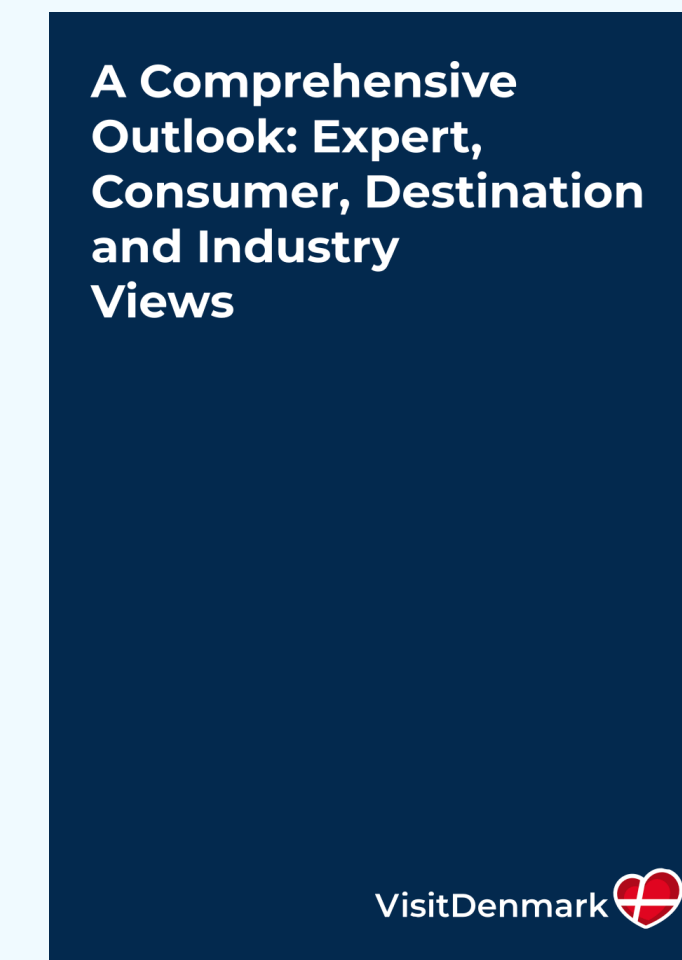
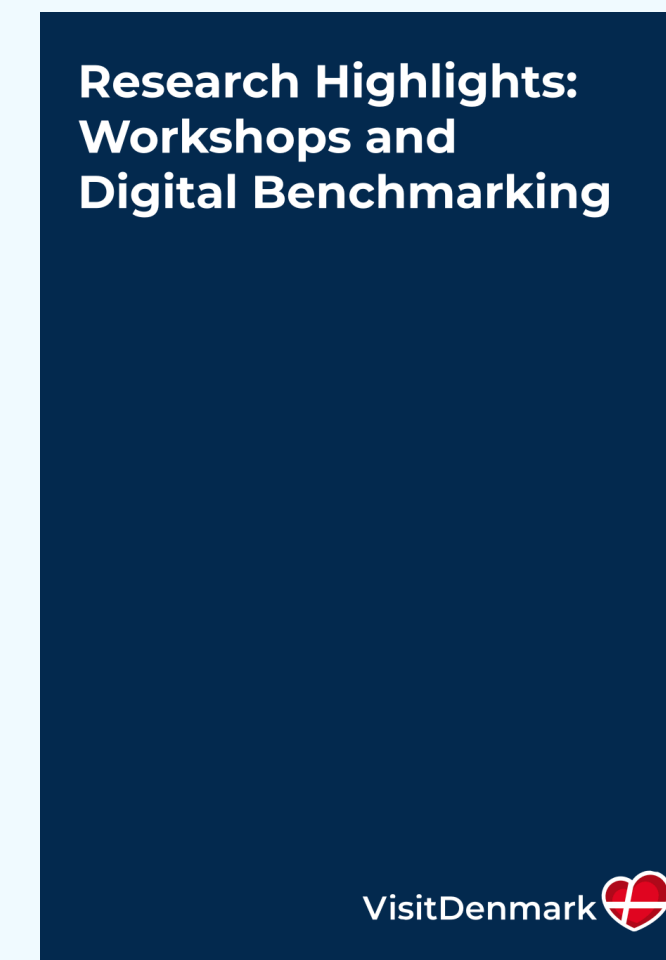
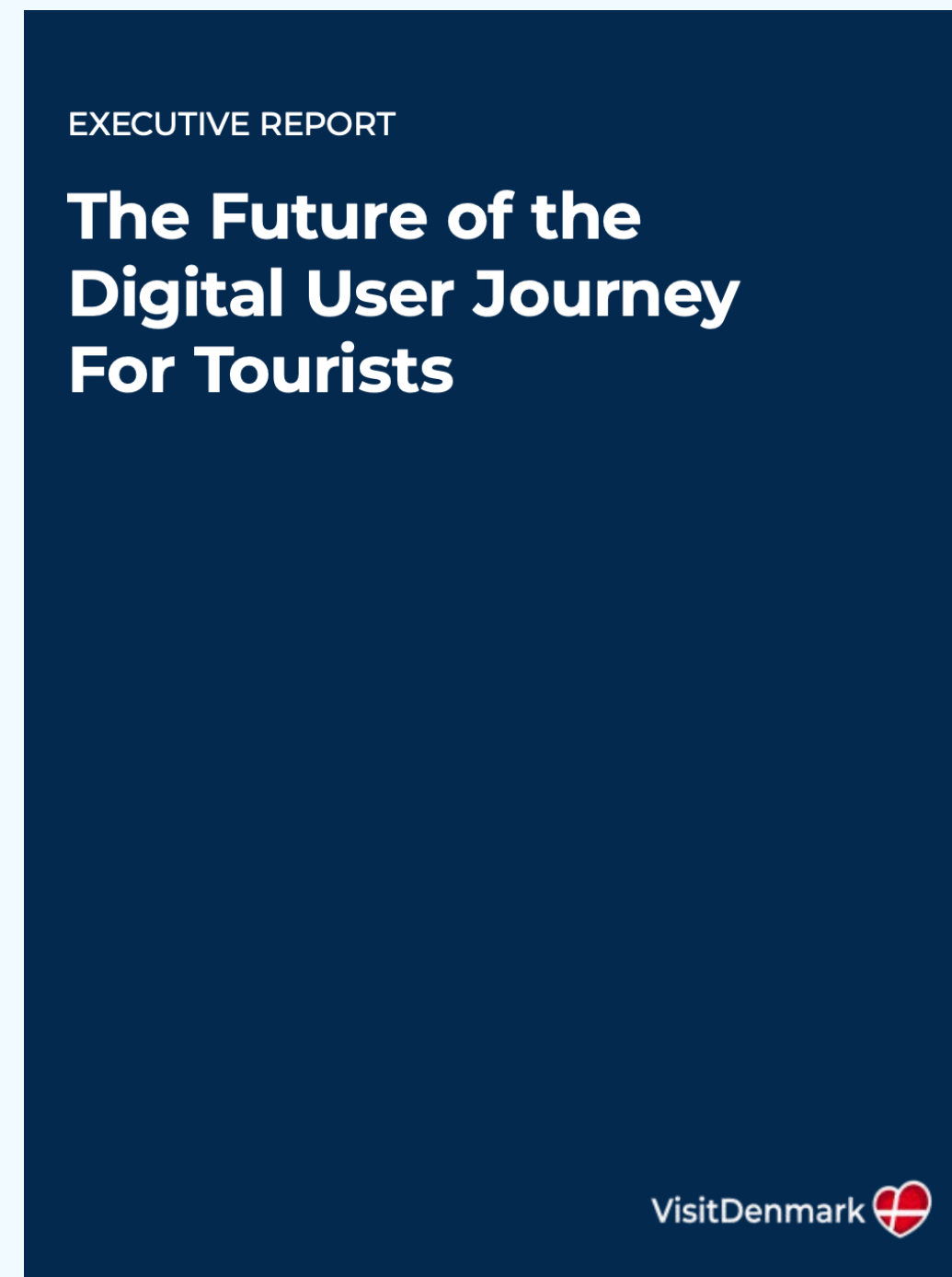
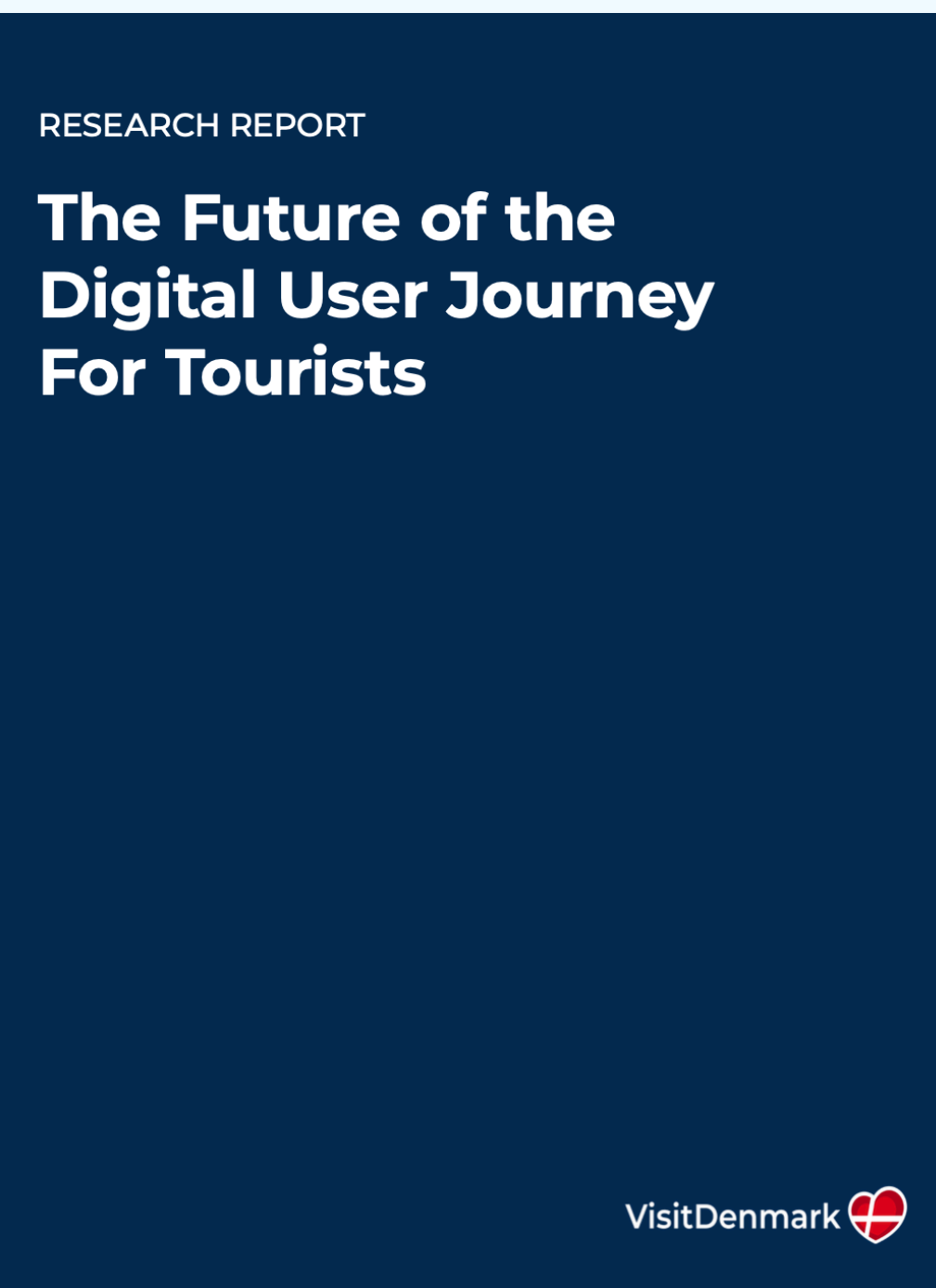
Suggestions & Recommendations



14 Suggestions &
Recommendations

- 1** Good Value for Money
- 2** Sharp and Concise
- 3** Step by Step

Research Outputs



Part 3
Conclusions

1.0

Destination Websites

1.0 Trust & Fulfilment

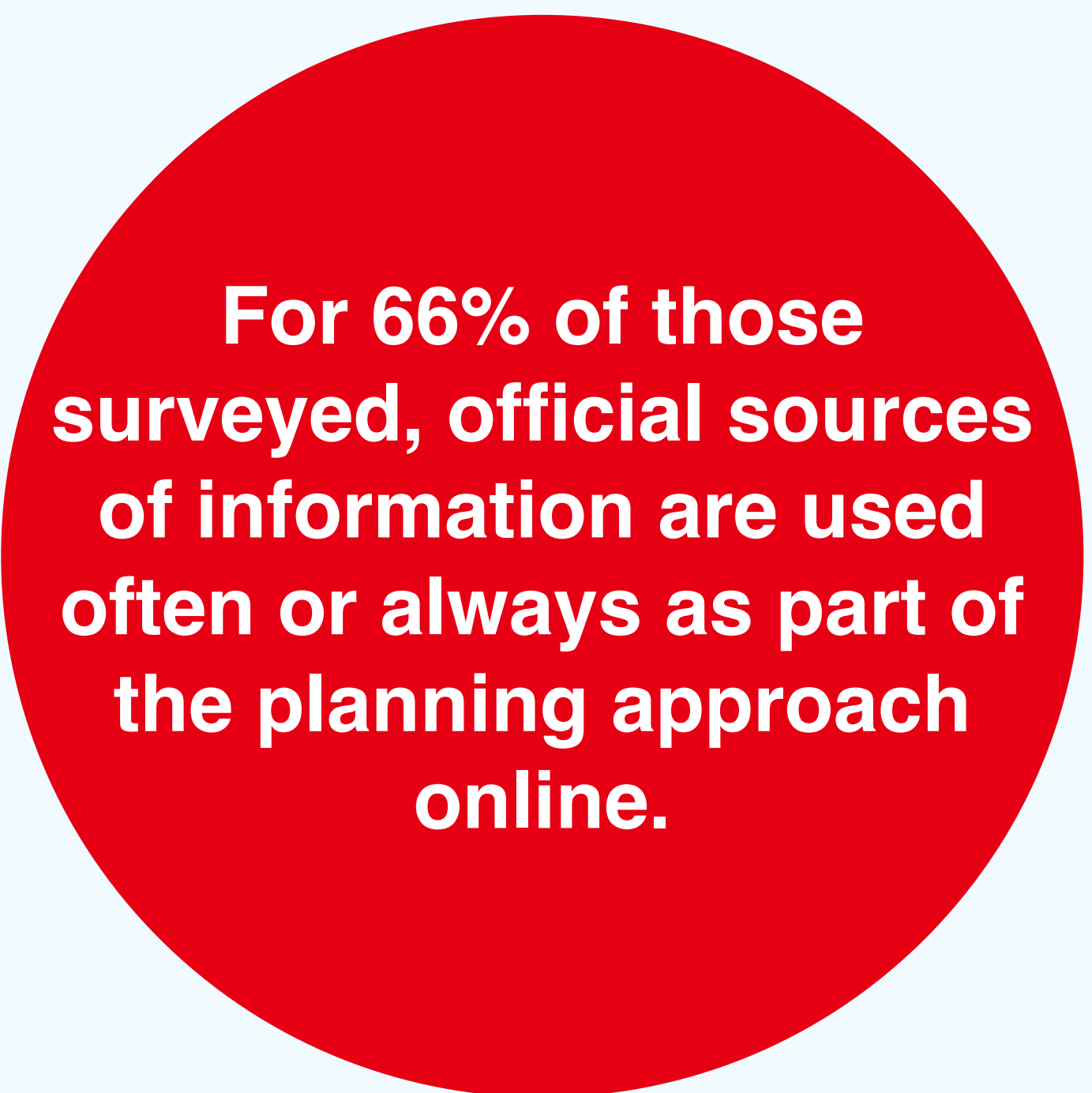
Every interaction must allow the user to complete or continue their journey according to their expectations - provide more inspiration.

All actions should provide fulfilment.

“53% of users state that they always trust destination sites while 39% say they generally prefer official destination sites.”

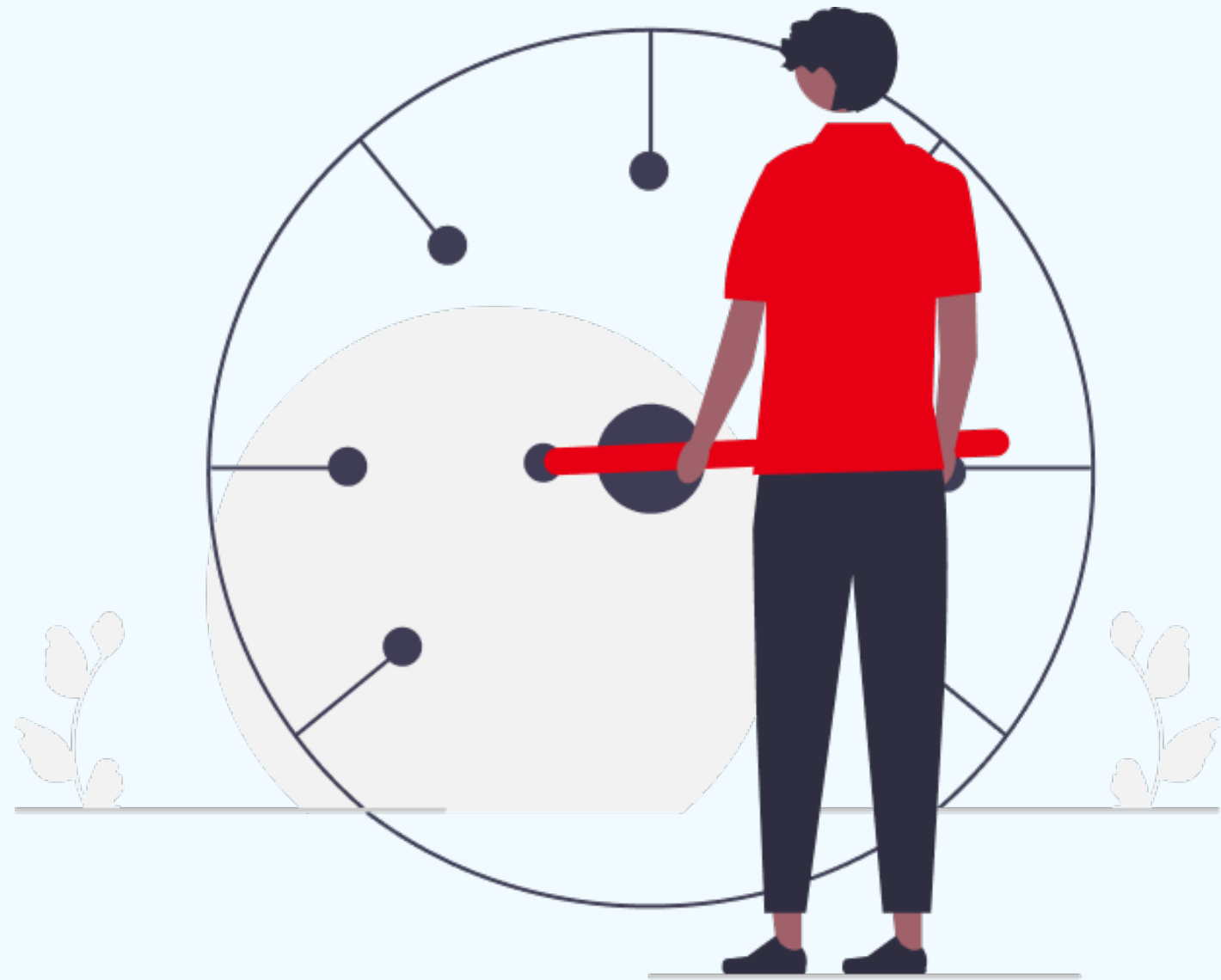
1.1 Tourists will still need public destination websites as part of their digital decision-making process from 2025-2030

There's no doubt about it, **the public does not “need” destination websites**. Answers, information, ideas and recommendations are **plentiful online** and vary from individual recommendations by publications, blogs and sites, through to rankings from users and visitors on Google, booking sites and elsewhere.



For 66% of those surveyed, official sources of information are used often or always as part of the planning approach online.

1.2 From a tourist perspective, how will the digital journey evolve in the future?



Digital marketing will increasingly be **overtaken by digital service design**, where **premium digital user experiences** will become the central driver of the product experience and in turn be the key factor driving reputation, loyalty and awareness.

In the destination context, **loyalty can also be considered through the lens of usefulness** - the reason to return to a site because as a digital service and it reliably meets a need or even adds value.

“The last best experience that anyone has anywhere, becomes the minimum expectation for the experience they want everywhere.”

Bridget Van Kralingen



Information Gatherers

Older demographic

**Value on reliability &
trustworthiness**

**Research is time-
consuming**



Savvy Collectors

Seek the best price

**The most convenient
way**

**Socially conscious
actions**

1.3 Is there still a “need” for public destination sites to promote digital guest services and for marketing use?

What is becoming clearer more than ever before is that destination websites cannot be measured as marketing tools alone.

Increasing the social footprint

Social proof

Sharing Features

Awareness

Inspiration to Planning

Booking

Experiencing & Sharing

1.4 Will public DMO websites still be a part of the digital decision-making process for tourists from 2025-2030? Or will other technologies dominate this space?

It seems that there is a resounding case for destination websites, with the need to be accepting of the fact that it **comes down to effective digital strategy whether or not they surface** in that crucial inspiration and planning phase.

The fact is, the **integration of reviews and ratings, alongside listings**, is now something that is expected by consumers, to verify and gather the opinions of the travellers, whilst forming their own personal opinion.



2.0

Digital Channels

2.1 Using as few digital channels as possible (as an entry point to Denmark) is an advantage for the tourist, both for digital guest service and for marketing use.

In Denmark, we have 100+ digital entrances to public tourist information that we, as VisitDenmark, think is too many. The presumption is that Denmark as a tourist destination can **maximise the total effect of the overall investment by having fewer digital entrances, apps etc...**

In order to deliver an effective and impactful digital strategy, **a clear, unified and streamlined brand approach is necessary.**



2.2

If VisitDenmark were to develop the optimal solution for the tourist - which digital channels should we cover within the digital user journey - and how many digital entrances should we have?



As independently ran tourism organisations, it can be difficult to stipulate whether or not they should have websites or social profiles and in what languages.

If this can be addressed with a **clearer brand hierarchy**, it might also give way for discovery and digital cues services to **exist at different stages in the funnel**, sometimes co-designed with industry partners.

2.3 What are the benefits of having fewer digital entrances for accessing tourist information?

The benefits from a brand perspective have been set out previously. However, there is also the question of **resources**.

There are two clear ways in which the **strength and capability of people** carrying out the tasks in relation to the database can be better used:

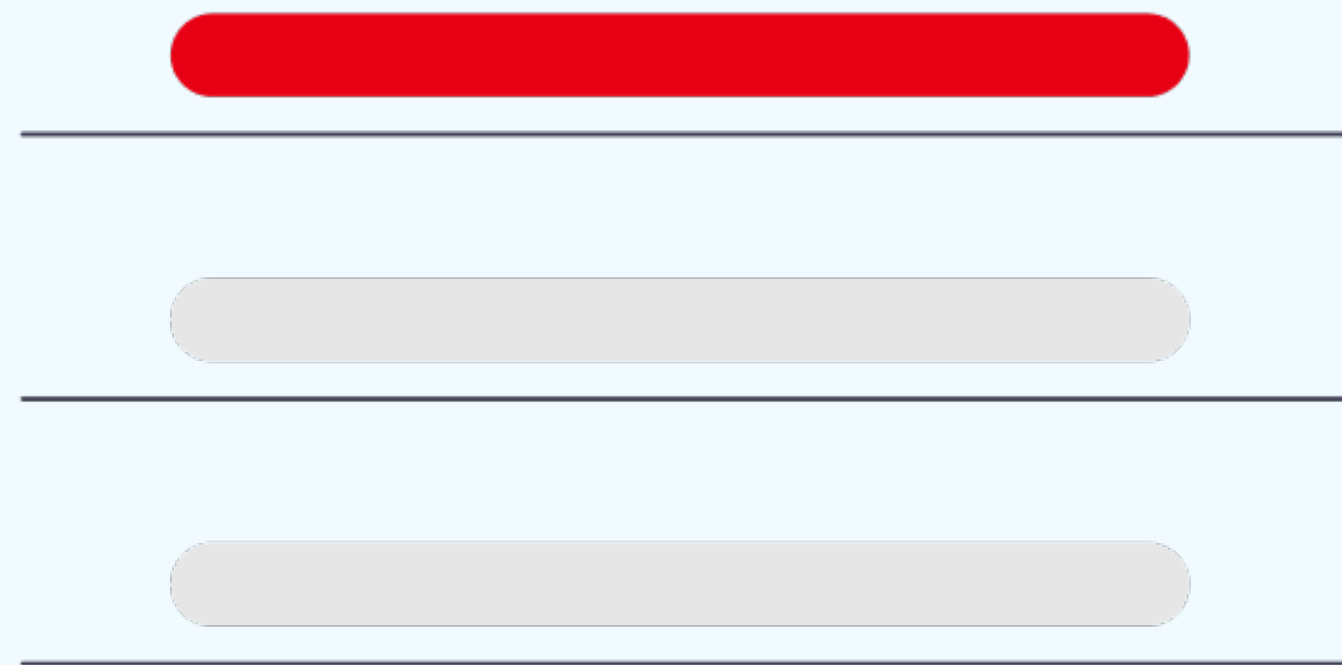
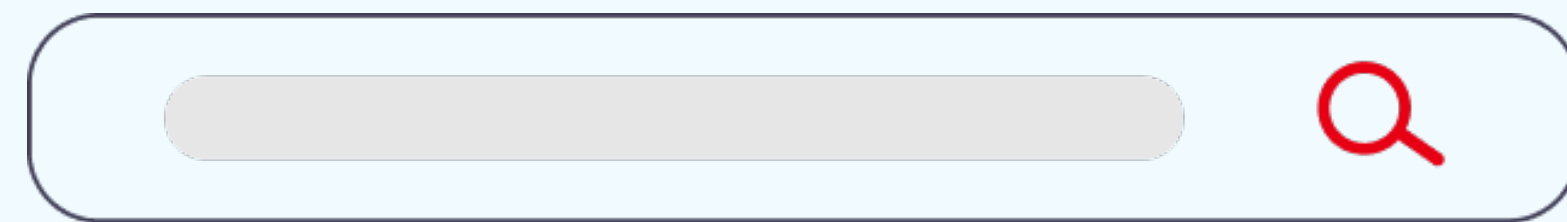
Digital Development

Digital Storytelling



2.4

What advantages within the current digital infrastructure do we lose if we were to have fewer digital entrances to tourist information?



Undoubtedly, there will be a **short-term impact on the SEO** if a decision to move to fewer digital channels is taken, but it may be worth the long-term gains.

Whilst **the best content should be retained and strengthened**, there are also significant pages which represent poorly performing content, either in quality or number of visits. In any redesign, the **loss of content is inevitable**, but it can also be intentional with a view to **establishing high content standards**.

3.0

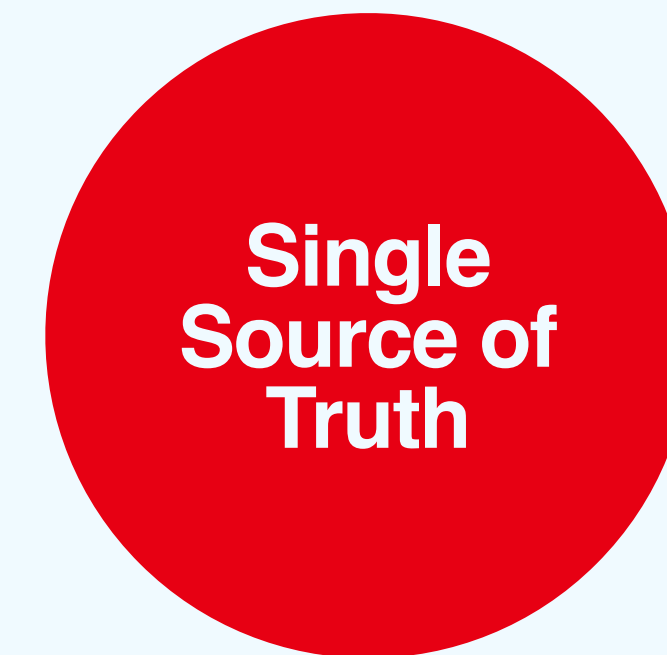
GuideDanmark

3.1

Does it still make sense to operate and develop the GuideDanmark database or is the same, higher quality, master data found on other APIs that Danish tourism could make use of?

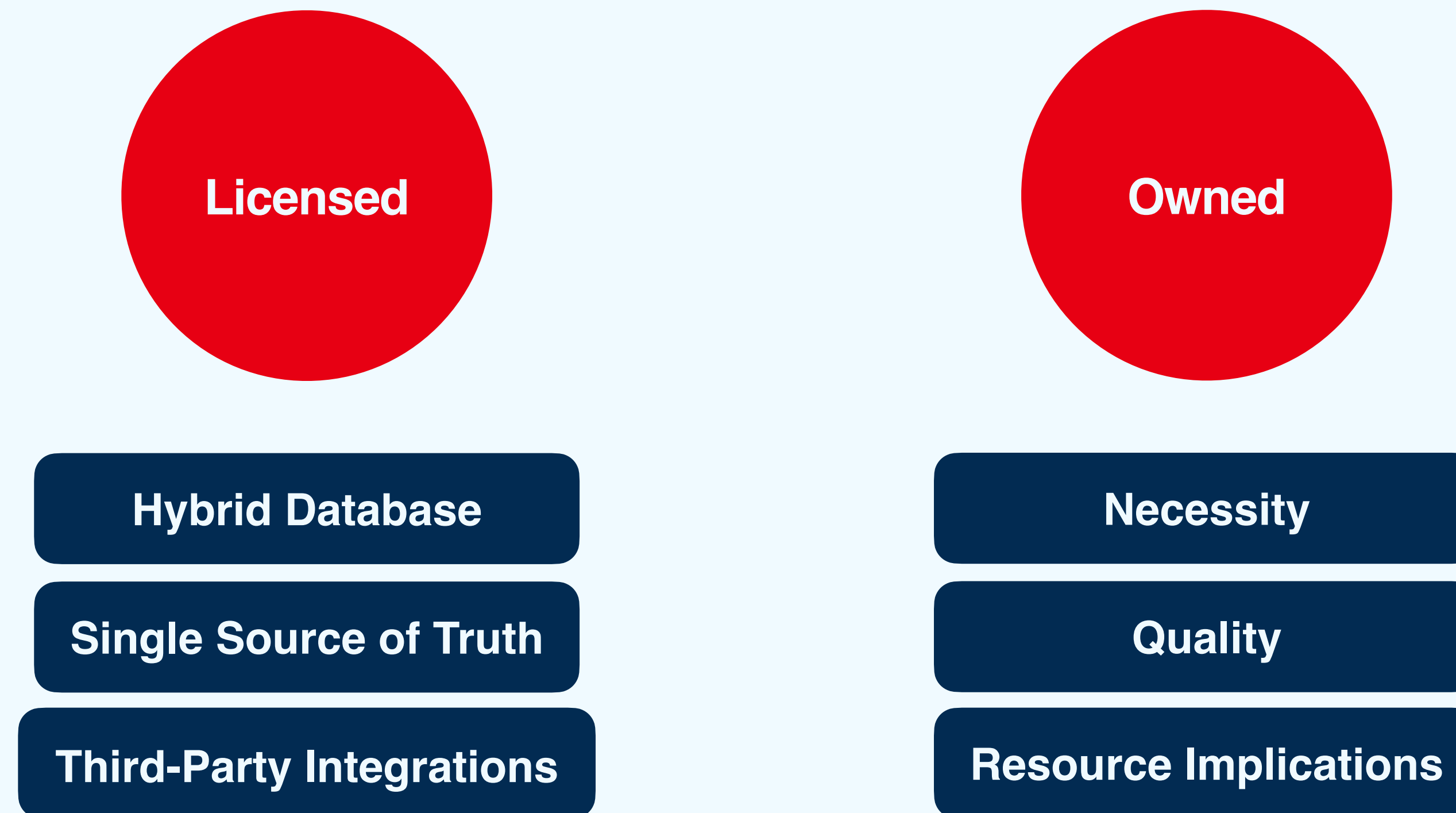
In many situations, Google provides quick and accurate answers, which is entirely the point. The more accurate and complete the industry's data is in Google, the better this is for the destination overall. **We should see Google as an ally!**

We believe that there is a middle-ground approach to be achieved, where instead of replacing GuideDanmark with Google data, **partially automated functions can help to improve the quality and completeness of listings**, whilst retaining ownership of original database content and improving the overall quality & front-end UX.



3.2 Would a switch to open data or other open APIs be worth the investment?

There are clear risks as well as opportunities, which **may require further research** depending on the overall direction considered as an outcome of this process:



3.3 Advantages and Disadvantages

Analytics data demonstrates the value that database content offers for the VisitDenmark site and especially the local and regional sites.

Competitor destinations who have similar databases have also been able to leverage, not only building content experiences but also going much further with **interactive maps and planners** too.

Without this advantage, it is difficult to see that the destination is offering any real unique-selling points other than creating interest and awareness through content, but **not providing fulfilment or a complete user journey**.



4.0

Non-Commercial

Focus

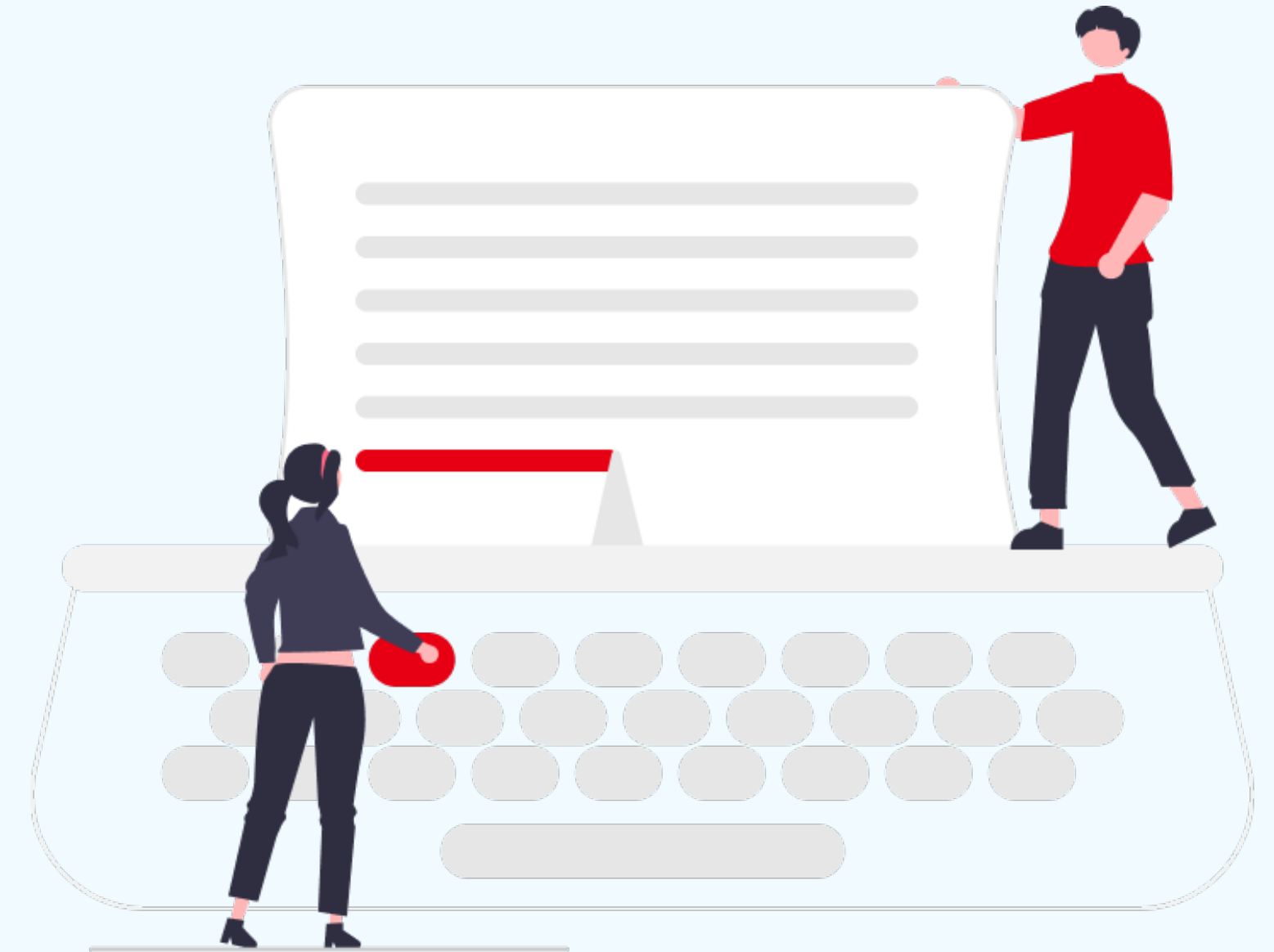
4.1

As a public DMO, we should focus more on non-commercial products that are not covered by commercial players such as Google, Booking.com, TripAdvisor, etc.

It is clear that, in a digitally competitive visitor landscape, VisitDenmark needs to focus on where its unique value proposition lies.

From the expert point of view, this is firmly in **content and storytelling**, where the destination's strengths mean they are able to convey a powerful and impactful brand message, **free of commercial bias or a hidden agenda.**

Denmark's larger commercial tourism industry operators are ready and willing to **co-invest in cooperative marketing campaigns**, where VisitDenmark's strengths in content and brand lie.



4.2

Should VisitDenmark focus more on non-commercial products like parks, beaches and local events?



Absolutely, these incredible products create a clear aspirational value and differentiate the offer Denmark has to bring to the table.

The DMO's ability to convey an inspirational message, which creates an evocative draw is absolutely key and these are inherently linked to the **DNA of the destination - rooted in its nature, culture and people.**

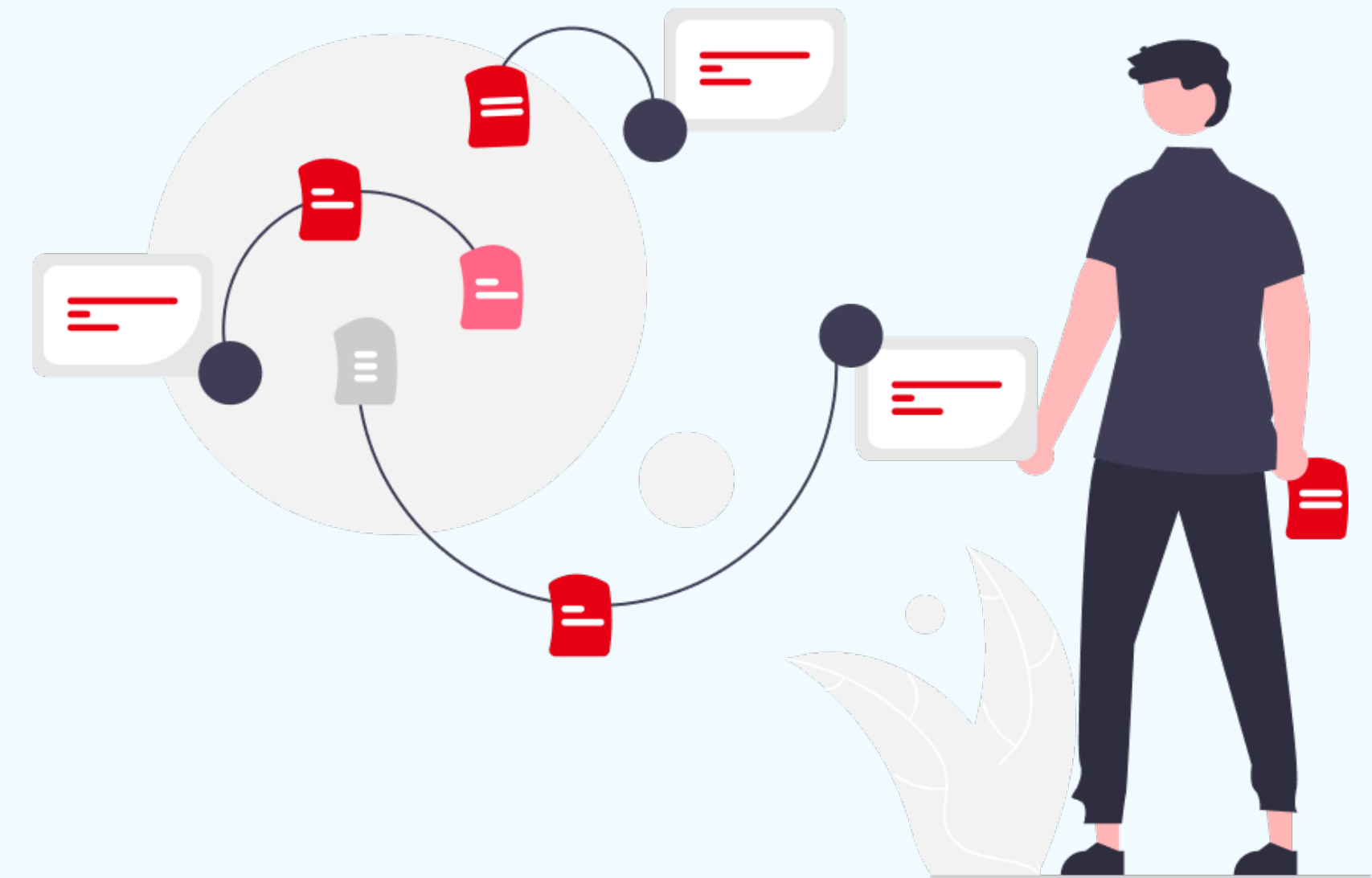
4.3

Can we as a public DMO make a difference for the tourist by presenting commercial products as part of our digital user journey - all in one place? What are the pros/cons?

Commercial products are a natural part of the visitor journey and there is **no strong argument to exclude them** from the journey.

It is the role of digital editors to **find a taxonomy and curation approach** which considers products based on the value they (may) bring to the traveller and how they support the overall brand experience.

The nature, landscapes, routes, itineraries and beauty are all key drivers which shape the wider experience and **should therefore dominate the overall content and discovery.**



4.4

Can we as a public DMO make a difference for the commercial products through our platforms or are there enough marketing offerings out there? What are the pros/cons?



Measuring the impact of the DMO based on sales conversion is a mistake, except in the cooperative campaigns example.

This is where a clear value can be demonstrated, where **the DMO builds awareness and establishes a creative concept and the private sector drive sales through remarking.**

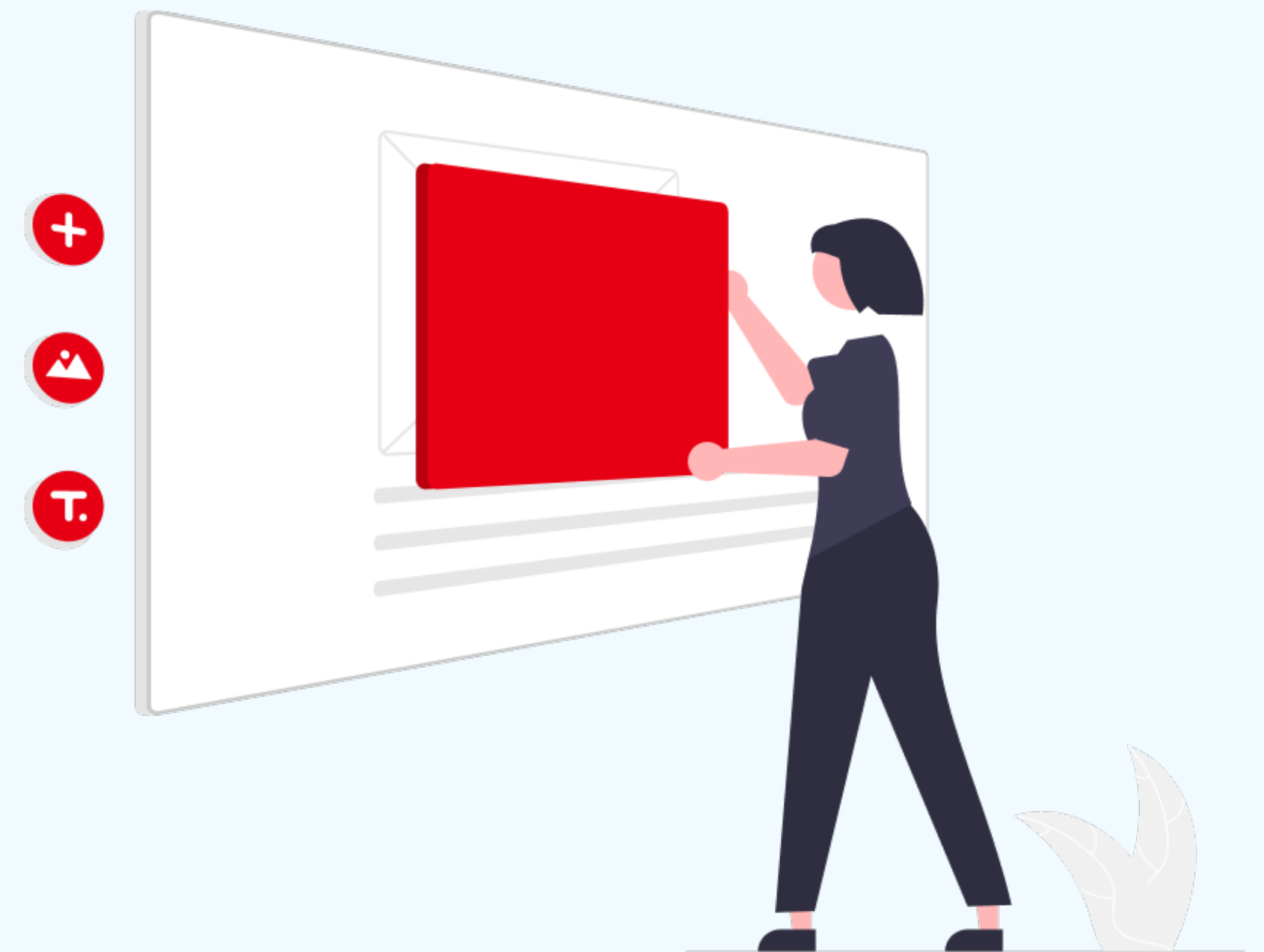
5.0

Web 3.0

5.1 Web 3.0 will challenge DMOs to reassess and rejuvenate their digital structure

An exceptional digital experience of content, tips, discoveries and features can prove invaluable and hold its own in a highly competitive space, whilst SEO plays an increasingly prominent role for both types of visitors who seek the best sites and tools with an increasingly low tolerance for bad experiences, yet an openness to engage with exceptional experiences.

Those DMOs who have a **clearly thought-out strategy**, **strong and impactful digital brand experience**, **clear consideration of the user journey** and **clarity in the brand hierarchy** can demonstrate their worth, re-establishing the unique value to visitors and the industry.



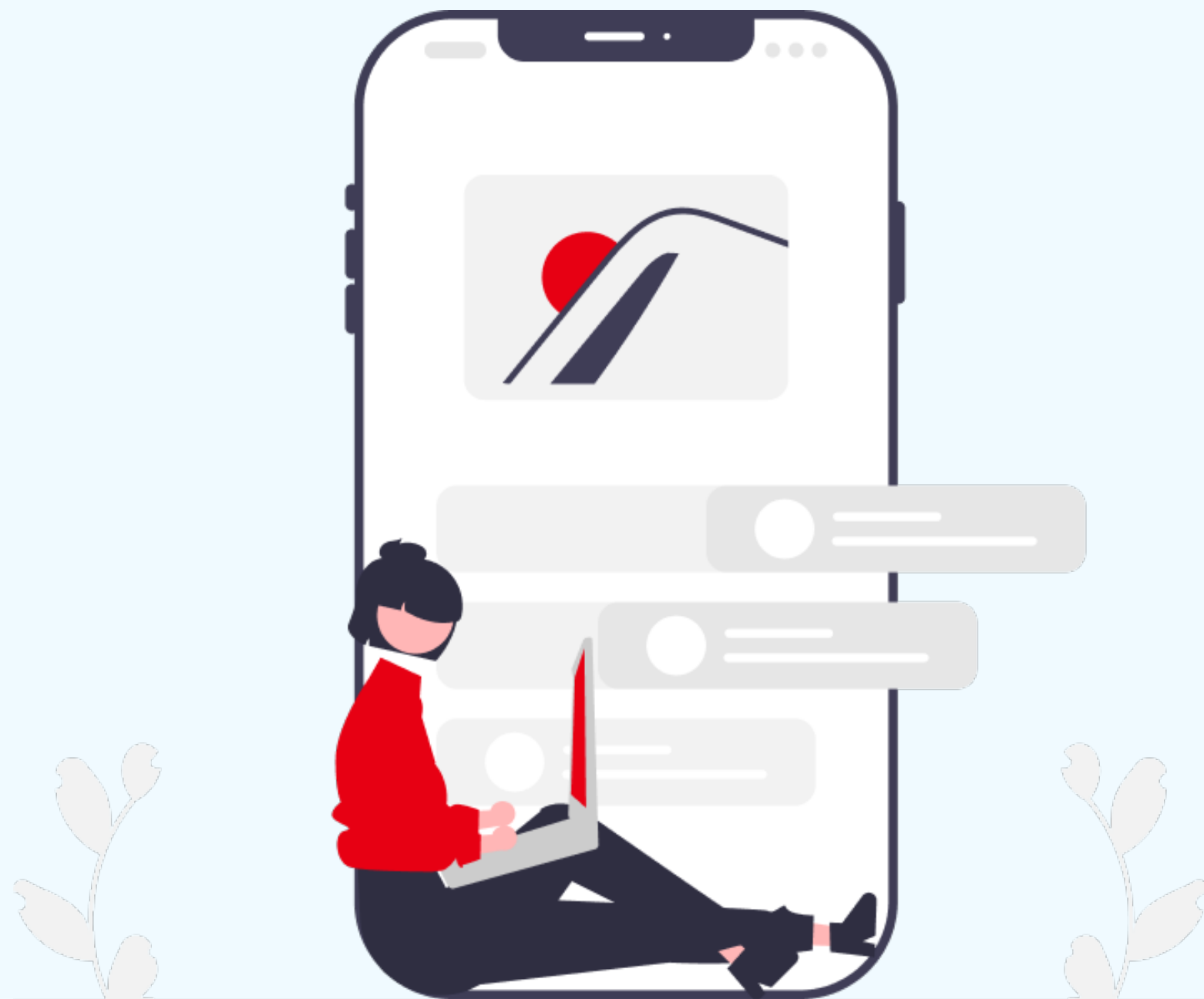


**Hidden
Optimisation**

With **open source content, data and a coordinated effort**, any digital solution can be imagined led by or facilitated by the DMO, from digital companion guides to open access data to power innovation elsewhere. This is where **the DMO becomes a key connector in the process.**

5.2

Are Danish DMO websites ready to implement interactive user experiences and is the technology infrastructure able to cope with opportunities emerging?



When supported with a **Digital Design System**, it's easier than ever before to ensure third-party creations are **100% aligned with the brand's principles** - from design to content tone.

Consideration needs to be taken as to whether the current Drupal build offers the right platform and environment upon which to build upon, or whether other development and design environments might allow a faster go-to-market solution for rapidly developing impactful and creative brand experiences to tap-into new needs and opportunities.

5.3

Will visitors value if interactive experiences are offered by DMO's websites? Or will they prefer if they are offered by other technologies like Meta or Google?

We can clearly see that **Google** and **Meta** are creating marketplace environments for content and communities to exist within them.

Both companies' solutions exist at different points in the digital visitor journey and **their developments need to be followed carefully.**

Instead of fearing the next iteration, we should look with curiosity and examine how each iteration might shape and shift **the way users discover, explore and engage digitally.**



Part 4
Suggestions &
Recommendations

Suggestions & Recommendations

- 1 Digital Return on Investment
- 2 Redesign VisitDenmark's Digital Presence
- 3 Carefully Consider Build Choices
- 4 Clear Destination Hierarchy
- 5 Digital Brand Framework
- 6 Atomic Digital Design System
- 7 Single Digital Brand Experience
- 8 Digitally Dispersed Agile Team
- 9 Digital Resources Database
- 10 Industry Digitalisation Programme
- 11 Completely Remodelled Database
- 12 Version Releases - Upgrade Programme
- 13 Product Distribution Model
- 14 Establish a Digital Partners Programme

2

Redesign VisitDenmark's Digital Presence

Design

UX Design

Design Trends

Immersive Content

Technology

Content
Personalisation

Advanced Content
Logic

Automated
Translations

Accessibility

Integrations

Product Database

User-Generated
Content

Partner & Curated
Stories

Reviews & Ratings

Licensed Content
Services

Features

Maps

Important
Information

Trip Builders

Conversational
Tools

Inspiration Search

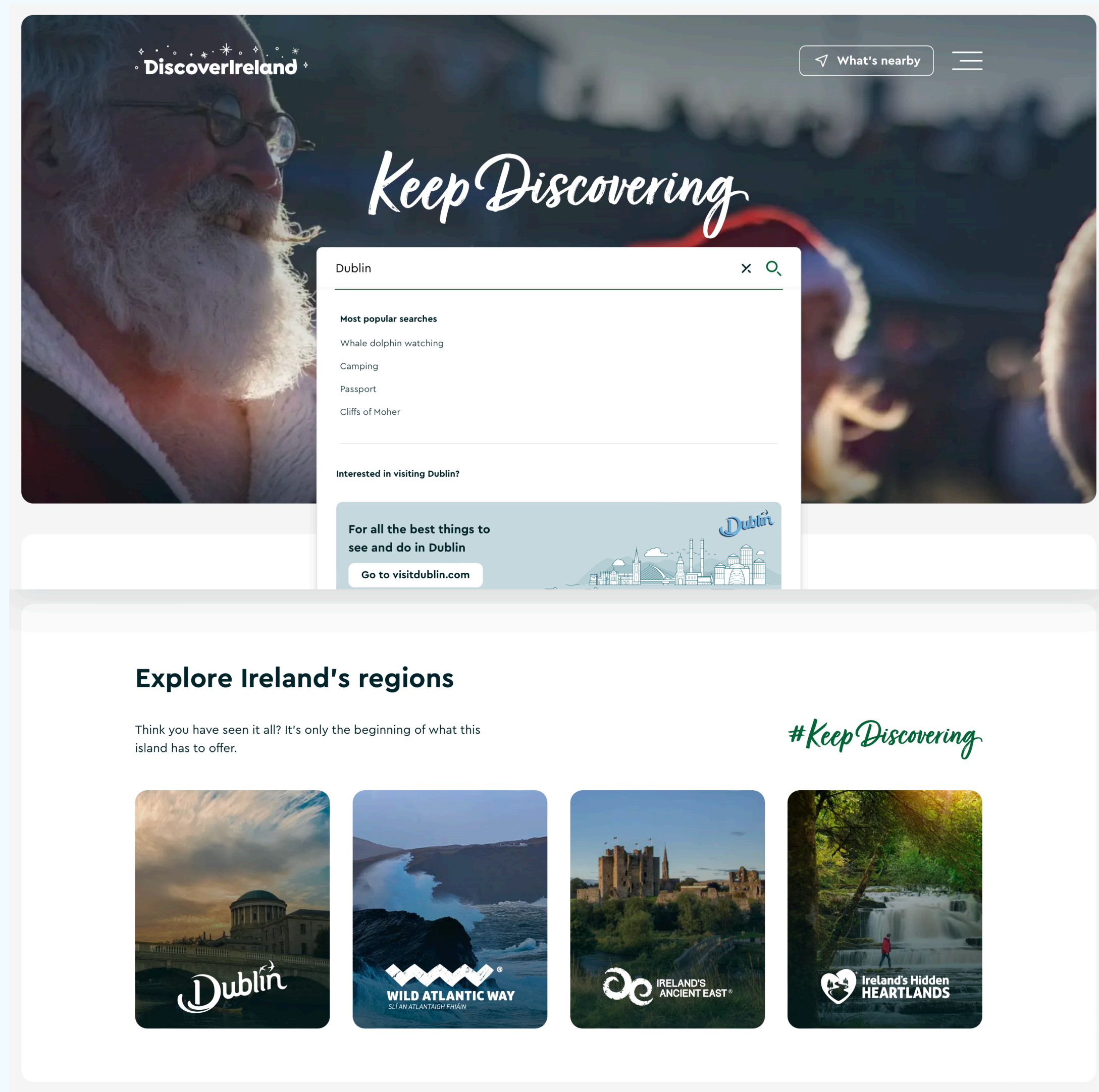
Personalised
Services

Personalisation

Search

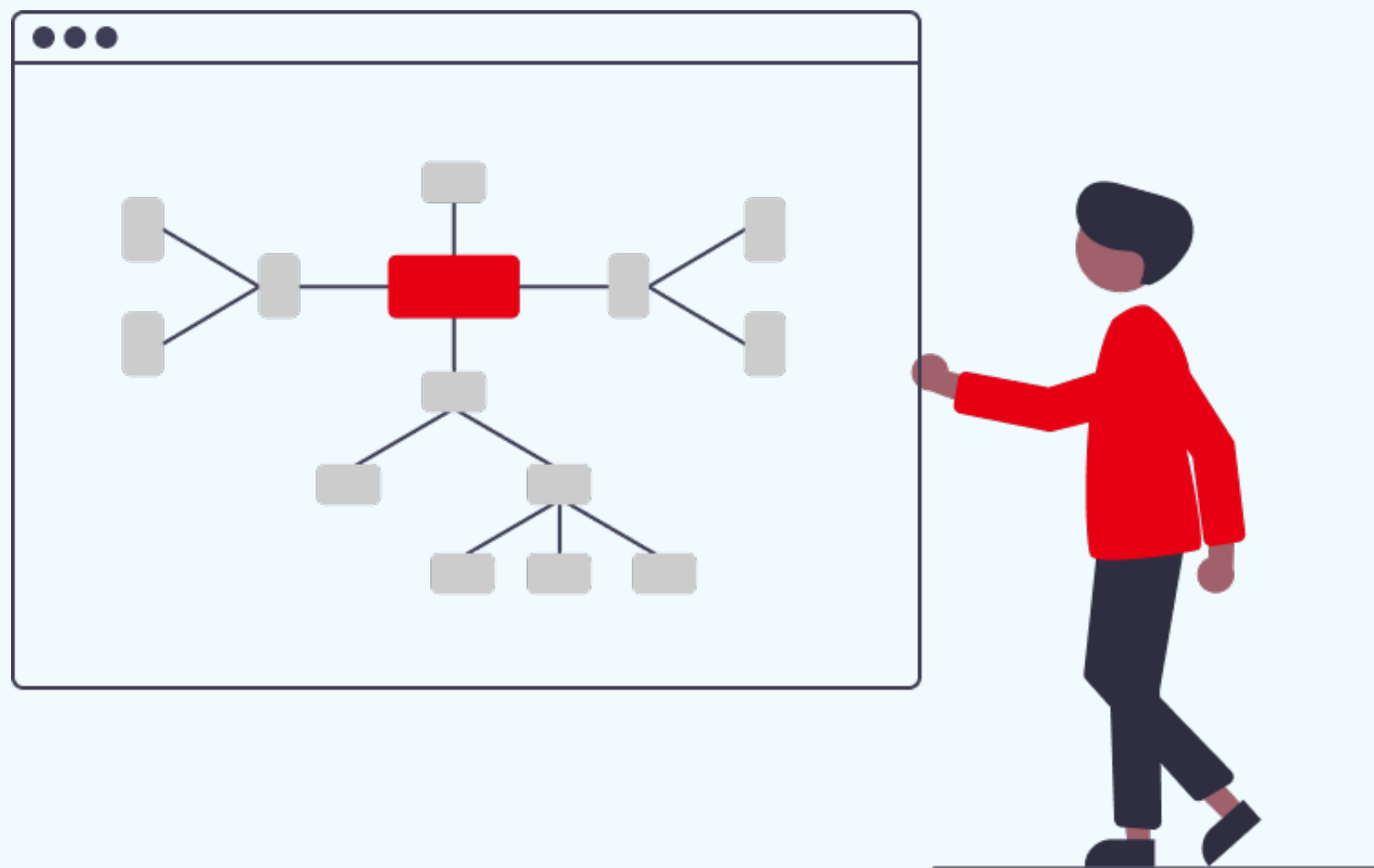
4 Clear Destination Hierarchy

At present, there is **no clear hierarchy** when it comes to how destinations are presented on VisitDenmark. This should be addressed with a clearer hierarchy, according to **level of interest, awareness and connectivity to each market.**



7 Single Digital Brand Experience

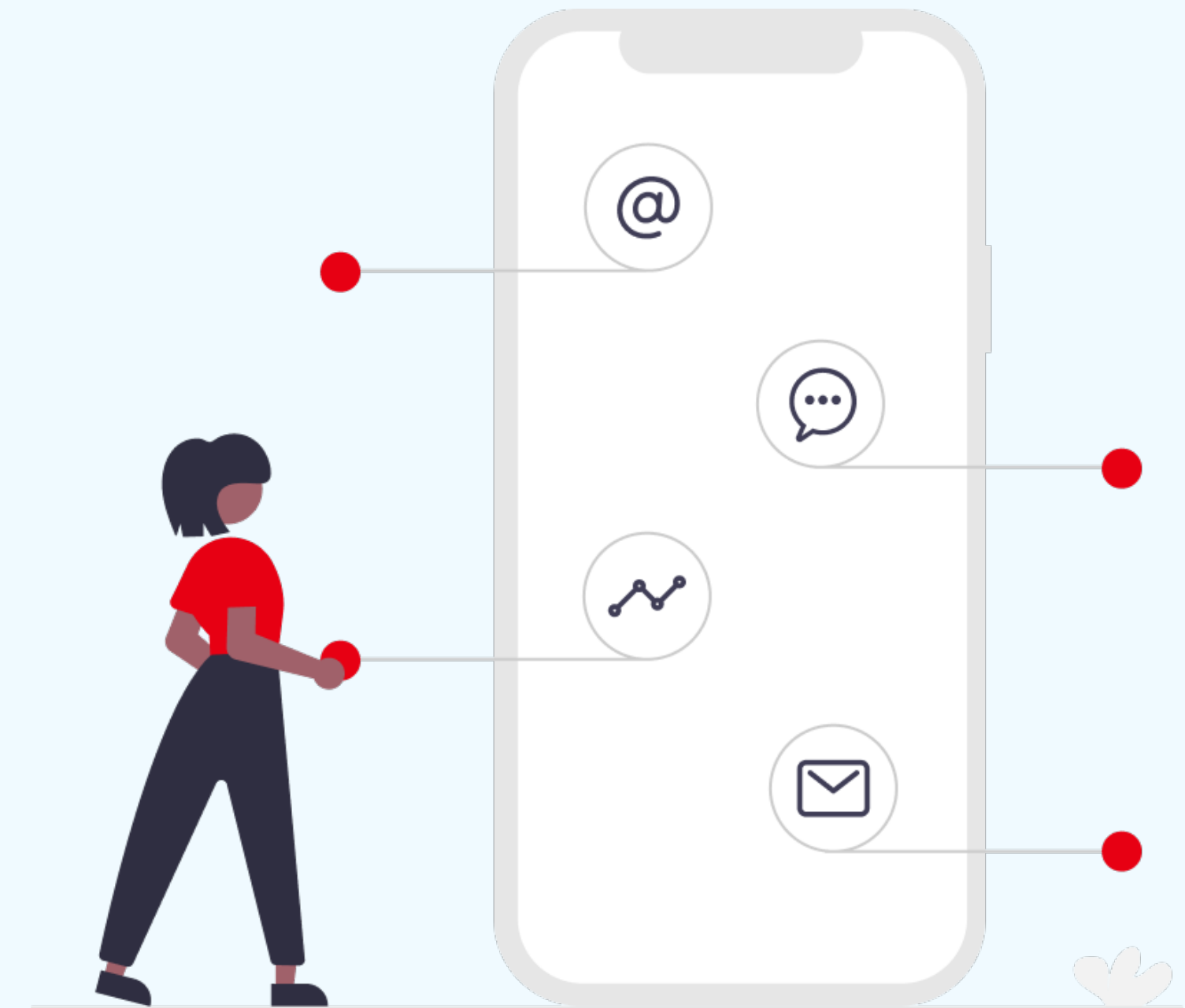
The **one-size-fits-all development approach** creates confusion and a sub-par user experience when it comes to individuality, design, user journey optimisation and rich interactive features.



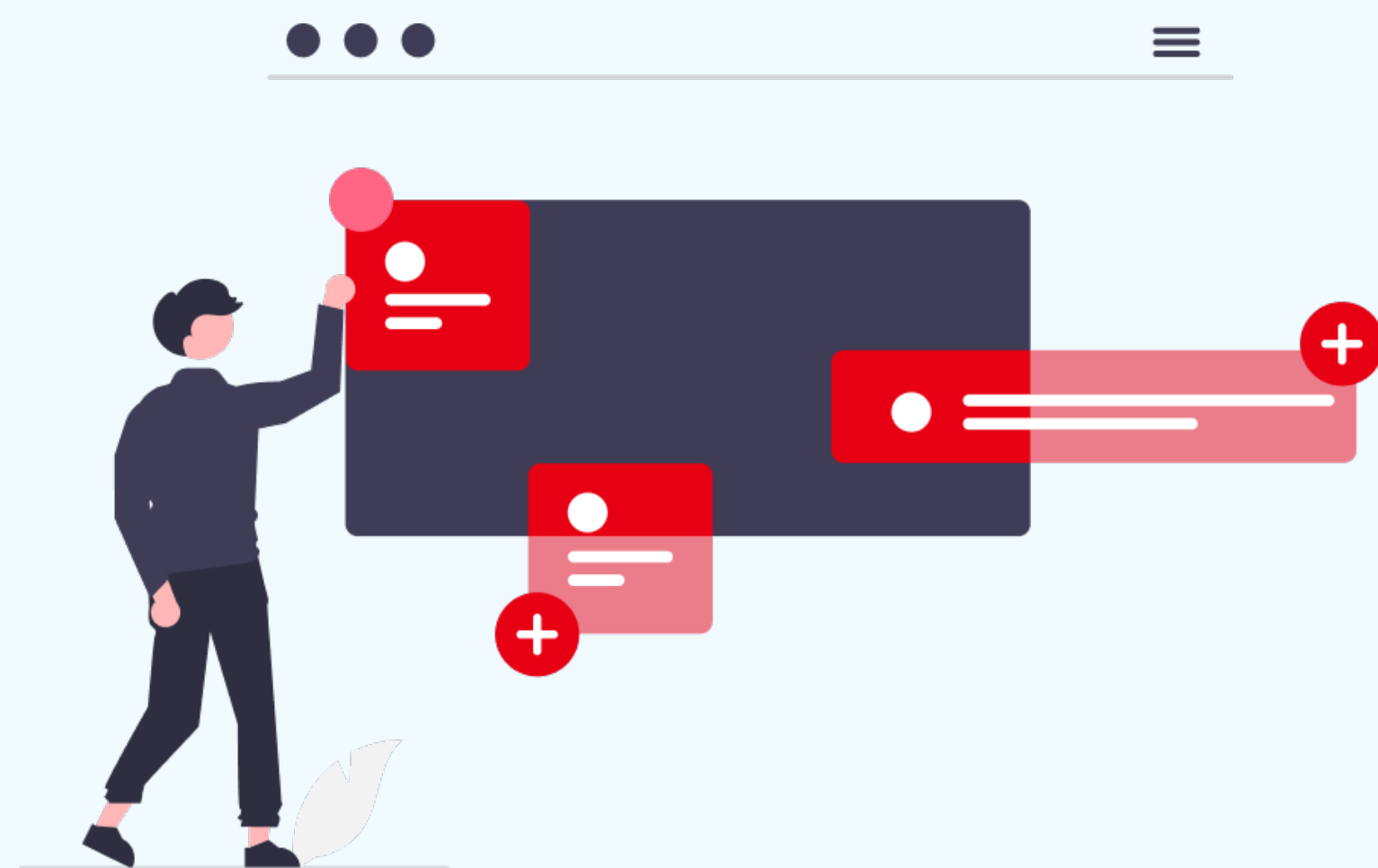
Instead of a complex mix of brands, destination sites, domains and language versions, **a single hierarchy of the brand** can be established from a single domain, whilst the **Digital Brand Framework** can set out the brand proposition and the **Digital Design System** can establish a scalable digital brand experience.

10 Industry Digitalisation Programme

An **Industry Digitalisation Programme** should aim to **raise the overall standards of digital** across the industry, both in terms of brand and marketing , where a new set of toolkits, frameworks, platforms and assets can drive that uptake but also in digital distribution and guest services, where even many leading businesses fall short or can benefit from the opportunity to strengthen their efforts .



11 Completely Remodelled Database



Having spent considerable time considering the role and relevancy of **GuideDanmark**, it would appear that VisitDenmark's digital **competitive position** would undoubtedly be weaker without it.

When comparing VisitDenmark with all other competitors and best practices, it is clear that one of the aspects that makes others highly digitally competitive is the **strength and quality of the product databases** that sit behind their digital brand experiences.

Core data - Improving Listings

Listing Completeness

Listing Improvements

Language Availability

Content Accuracy

Quality Assurance

Routine Updating

Intelligent Tagging

Extended Schema

Interest Categories

User Experience

Dashboard: Editors

Approval list

Expiring entries

1-Click business reminder e-mails, listing approvals, non-approval feedback

Translation interface for language editors

Dashboard: Businesses

Front-end Experience

Integrations & Extensions

Single Business Profile Management

Headless CMS Content API

Review Aggregation

CRM API Integration

Social Content Integration

Data Partnerships

Good partnerships can achieve significant improvements to listings

Can allow to aggregate product data on specialist areas

12 Version Releases - Upgrade Programme

If a more ambitious 'scale-up' vision for GuideDanmark is pursued then it is essential to **adopt the mindset to that of a digital service provider**, with a business-led approach to delivering end-client services.

A **clear release schedule** can also serve to encourage businesses to update and upgrade business listings. It might look something like this:



June 2025

Pre-Release V 3.0

Leading to training, partner activation, new schema standards, tech notes and specifications.

December 2025

Release V 3.0

Upgrades deployed to all sites etc.

March 2026

Legacy standards no longer accepted

14 Establish a Digital Partners Programme

A digital partners network can be a simple way to **grow the resources, capability and talent** surrounding VisitDenmark's digital brand presence.

Digital Partners

- Users or authors passionate about immersive content
- Developers, start-ups and tech community
- Industry technical partners

Programmes

A series of programmes with different incentives attached can be built to encourage partners and the wider creative and developer community to build prototype solutions off the back of the database and content APIs.

Questions?

MANGE TAK