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Insight Paper No. 2

Destination Intelligence:

The Next Competitive Advantage in Travel



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*From insight
to action.
For sustainable
destinations.*

Rajni Hasija

September 2026



RR Hasija & Associates LLP

Strategy • Sustainability • Governance • Impact

HERITAGE
PEOPLE
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A SUSTAINABLE TOMORROW

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Destination Intelligence: The Next Competitive Advantage in Travel

Insight Series — Paper 2

Introduction

What makes a destination intelligent?

Today, the immediate answer may appear to lie in technology — digital platforms, data analytics, artificial intelligence, predictive tools and increasingly sophisticated ways of understanding traveller behaviour. These capabilities are undoubtedly changing tourism. But destination intelligence did not begin with technology.

A destination can be intelligent even without the internet.

I was reminded of this during a visit to Lucerne in Switzerland some years ago. For a first-time visitor, the city seemed remarkably easy to understand. On arriving at the railway station, the tourism office became a natural first point of contact, including for planning our visit to Mount Titlis. The map and information material provided to us were simple but comprehensive. Routes were clearly indicated, along with the buses and trains required to reach different places.

The experience continued at the hotel. On checking in, we received useful information about the city as well as a visitor pass that allowed us to use public transport within the prescribed area. For a new visitor, this made a significant difference. Information was available where it was needed, mobility was easy to understand and the cost of moving around the city was minimal.

What stayed with me most was that I hardly needed the internet to navigate the destination.

The signs were clear. The maps spoke for themselves. The transport information was understandable. The tourism office, hotel, public transport and physical signage appeared to complement one another. We did not have to repeatedly ask people where to go, which bus to take or how to reach the next attraction. The destination had already anticipated many of those questions.

It was, in a sense, intelligence without internet.

There was sophisticated thinking behind what appeared to the traveller as simplicity.

This is an important starting point for understanding Destination Intelligence. An intelligent destination is not necessarily the one with the most advanced technology. It is one that understands the visitor well enough to remove friction from the journey. Reliable information, intuitive signage, accessible mobility, hospitality, infrastructure and coordination between different parts of the destination can themselves represent intelligence when they have been designed around how a visitor actually experiences a place.

Technology adds another powerful dimension. Data can help destinations understand how travellers move, where demand is emerging, where difficulties occur and how visitor behaviour is changing. Artificial intelligence can help interpret these signals, anticipate requirements and support better decisions. But technology creates value only when that intelligence ultimately improves something tangible in the destination.

Destination Intelligence should therefore be understood as something broader than digital intelligence. It lies in the ability of a destination to **understand, anticipate, connect and respond** — bringing together its physical infrastructure, mobility, hospitality, information, services, institutions and increasingly its digital capabilities around the needs of the traveller and the destination itself.

As tourism evolves, destinations will compete not only on **what they have to offer**, but increasingly on **how intelligently they enable travellers to experience it**.

This paper explores that transition — and why Destination Intelligence may become the next competitive advantage in travel.

1. The Changing Destination

For a long time, the success of a tourism destination was largely visible through numbers. How many tourists arrived? How many nights did they stay? How much did they spend? How many jobs did tourism support? These continue to be important measures. Tourism is an economic activity, and destinations understandably seek growth in visitor numbers, expenditure, employment and investment.

But numbers alone do not tell us how well a destination is working.

A destination may be receiving more visitors every year while its roads, public spaces and services struggle to cope with them. Visitors may be concentrated in a few locations and seasons while equally valuable tourism assets elsewhere remain underused. Tourism revenues may grow without the benefits flowing sufficiently into local communities. And a destination that has been marketed successfully may still be difficult for a first-time visitor to navigate once they arrive.

The measure of destination success is therefore becoming wider. The question is no longer only **how many visitors came**, but also **where they went, how they experienced the destination, what value they created, how that value was distributed and what impact their presence had on the place itself**.

This shift is increasingly visible in tourism policy. The **OECD, in *Tourism Trends and Policies 2026***, observes that tourism policy is moving beyond a predominantly growth-led approach towards one that seeks a better balance between economic, social and environmental outcomes. It also highlights the increasing importance of managing visitor flows, strengthening resilience and developing better evidence for tourism decision-making. [i]

The industry is recognising the same change. The **World Travel & Tourism Council (WTTC), in *Destination Stewardship: Creating Value for All (2026)***, argues that the conversation around successful tourism needs to extend beyond visitor numbers to how growth is managed and how tourism creates lasting value for residents, businesses and visitors. Its emphasis on resident engagement, better use of data, dispersing tourism across places and seasons, and evidence-based destination management reflects an important change in thinking. [ii]

This does not mean that destinations should stop seeking growth. It means that **growth itself has to be understood better**.

The traveller has changed as well.

Today's traveller often knows considerably more about a destination before arriving than an earlier generation of tourists did. Search, social media, reviews, online maps, travel platforms and recommendations influence not only where people travel but also what they expect when they reach there. Information that was once obtained after arriving at a destination is increasingly available before the journey begins.

At the same time, expectations are extending beyond the attraction itself. Travellers look at how easily they can reach and move around a destination, where they can stay, what they can experience, how reliable the available information is and how easily different elements of the journey come together.

Industry research reflects this change. **Expedia Group's 2025 Traveler Value Index** points to the growing influence of digital sources, including social media, on travel inspiration and decision-making. [iii] **Booking.com's 2025 research on travel and sustainability** adds another dimension: travellers increasingly express interest in authentic local experiences and in ensuring that their spending benefits local communities. [iv]

The changing traveller is therefore not simply a more digital traveller. The traveller is becoming **better informed, more connected, more expectant and, in many cases, more conscious of the destination being visited**.

The change is visible in India

India provides a useful illustration because destinations are changing in very different ways. Kerala shows what sustained positioning and tourism promotion can achieve, but also why marketing success must eventually be matched by destination capability. Varanasi is confronting the pressures created by very high pilgrimage demand, while Ayodhya is expanding transport and visitor infrastructure around a rapidly growing pilgrimage economy. Goa, as a mature destination, faces a different challenge: managing mobility, concentration, seasonality and changing visitor expectations while continuing to renew its tourism proposition.

These are not presented here as equivalent models of Destination Intelligence. They are reminders that the management question changes with the destination. One may need to distribute demand, another to build capacity, another to improve mobility or diversify experiences. What they share is the need to look beyond attracting visitors and ask how the destination actually functions once they arrive.

That is why a destination cannot be viewed only as a collection of attractions to be marketed. It has to function as an ecosystem. The visitor experiences the airport or railway station, the road into the city, public transport, signage, cleanliness, information, accommodation, food, safety and local experiences as parts of one journey.

This shift is not confined to India. In Flanders, Belgium, the tourism authority **VISITFLANDERS**, through its *Travel to Tomorrow* philosophy, has articulated a movement from pursuing simply “more” tourism towards creating “more value.” Its approach considers the interests of visitors alongside residents, tourism entrepreneurs and the place itself. The circumstances are different from India, but the underlying change in thinking is similar: tourism development is increasingly being viewed through the value it creates for the entire destination rather than visitor volume alone. [v]

This makes destination management considerably more complex than destination promotion.

If visitors are concentrated in one part of a destination, should they be encouraged to explore another? If a particular attraction is becoming congested, can demand be distributed across different times? If travellers repeatedly struggle with local mobility or information, can the destination identify that friction and correct it? If an emerging experience is attracting interest, can local businesses and communities participate in the opportunity? If weather, climate or an unexpected event changes visitor flows, how quickly can the destination respond?

Answering these questions requires something more than good marketing.

It requires the destination to **know itself and its visitors better**.

It needs to understand who is coming, when they are coming, where they are going, what they are looking for, where they encounter difficulties, which assets are underused, where infrastructure is under pressure and how tourism is affecting the people and places that make up the destination.

Some of this understanding comes from experience and good destination management. Increasingly, it can also come from data, technology and the digital footprints generated throughout the traveller journey.

The changing destination therefore creates the need for a new capability: not simply the ability to attract demand, but the ability to **understand it, anticipate it and respond to it**.

That is where Destination Intelligence begins.

2. What Makes a Destination Intelligent?

If destinations are changing, as discussed in the previous section, the next question is more fundamental: **what actually makes a destination intelligent?**

The immediate answer today may be technology. A destination equipped with digital platforms, real-time information, integrated maps, artificial intelligence, predictive analytics and connected services may appear more intelligent than one without them. Technology is undoubtedly becoming an increasingly important part of Destination Intelligence and will become even more significant in the years ahead. But technology alone does not make a destination intelligent.

For the traveller, intelligence is experienced much more simply.

Imagine arriving at an unfamiliar destination for the first time. The immediate requirements are usually quite basic. Where is the hotel? How does one get there from the airport or railway station? What local transport is available? Where can reliable information about places to visit be found? What are the opening hours? Where can one eat? How far is one attraction from another? Can the journey be made comfortably with luggage? Is the area walkable? And if assistance is required, where can it be found?

If answers to these questions are easily available and the physical journey supports them, the destination begins to feel easy to navigate. Information may come through Google Maps, a destination application, a physical map, signage, a tourism information centre or a person providing assistance. The medium may differ; what matters to the traveller is that the information is **reliable, accessible and useful when it is needed**.

This is where Destination Intelligence becomes visible to the traveller.

Intelligence begins with understanding the journey

A destination is not experienced only through its attractions. It is experienced through a chain of interactions—from arrival and orientation to local transport, accommodation, food, attractions, activities, shopping, public spaces and eventually departure.

The quality of one element cannot always compensate for failure elsewhere. An excellent airport does not solve the problem if the last-mile connection to the hotel is difficult. A sophisticated tourism application has limited value if the information on it is inaccurate. An internationally recognised attraction can still create a poor visitor experience if signage, pedestrian access, public conveniences or local mobility are inadequate.

The **Ministry of Tourism, Government of India, in its *Guidelines for Swadesh Darshan 2.0 (2022)***, reflects this broader understanding. The framework adopts a tourist- and destination-centric approach and emphasises improving the tourist experience throughout the journey, from arrival to return. Significantly, it recognises that competition in tourism is not confined to an individual tourism service or attraction; it is the overall experience of the destination that matters. [vi]

This leads to an important principle:

A destination is experienced as a whole, even though it is delivered in parts.

Those parts may be managed by completely different entities—government departments, municipal authorities, transport operators, hotels, restaurants, attraction managers, technology platforms, tour operators and local businesses. The traveller, however, does not necessarily make these institutional distinctions. To the traveller, they collectively represent the destination.

Connectivity must continue beyond arrival

This becomes particularly visible in mobility.

Airports and railway stations connect travellers to destinations, but they do not necessarily connect travellers *within* them. The journey between the point of arrival and the hotel, between the hotel and an attraction, and from one experience to another can determine how convenient or difficult the destination actually feels.

Last-mile connectivity therefore deserves to be considered part of Destination Intelligence rather than merely a transport issue.

The **OECD, in *Tourism Trends and Policies 2026***, recognises transport as integral to the tourism experience and highlights the importance of coordination between tourism and transport planning. Integrated approaches

can create more seamless connections between different modes of transport and improve destination connectivity and accessibility. [i]

India's destination-development framework similarly recognises last-mile road connectivity, signage, walkways, internet connectivity and visitor amenities as components of integrated destination development. [vi]

But connectivity is not only physical. The traveller must also be able to **understand the connection**.

A bus may exist, but does the visitor know where to board it? A walking route may be available, but is it clearly marked? A hotel may be close to the railway station, but can a first-time visitor carrying luggage reach it conveniently? Information, signage, maps, digital navigation and physical infrastructure therefore need to complement one another.

Technology as an intelligence layer

If physical infrastructure enables the journey, technology increasingly has the potential to understand, connect and personalise it.

Digital maps have already transformed the way travellers navigate unfamiliar places. Mobile applications can bring transport, accommodation, attractions and services onto a single device. Real-time information can alert travellers to delays, congestion or changes. Digital payments can reduce transactional friction. Translation tools can overcome language barriers. Data generated through these interactions can, in turn, help destinations understand visitor behaviour.

Artificial intelligence takes this capability considerably further.

Instead of requiring the traveller to search separately for a hotel, attraction, restaurant, route and activity, conversational AI can increasingly understand the requirement as a whole. A traveller may be able to say:

I have four hours, I am travelling with an elderly parent, I prefer limited walking, I would like to experience something local and I need to return to the railway station by evening.

The value of intelligence in such a situation lies not simply in retrieving information, but in understanding the **context behind the requirement** and bringing different elements of the destination together around it.

The **OECD, in *Tourism Trends and Policies 2026***, identifies digitalisation and artificial intelligence as increasingly important forces reshaping tourism. It points to opportunities for personalised visitor experiences, greater operational efficiency, improved market intelligence, better management of visitor flows and more timely data-driven decision-making. At the same time, OECD notes that meaningful adoption of AI requires more than deployment

of technological tools. It also requires organisational readiness, reliable data infrastructure, strategic alignment and collaboration. [i]

This distinction is important.

Technology can provide intelligence, but the destination must have the capability to act upon it.

An AI platform may recommend an attraction perfectly, but it cannot compensate for an inaccessible road leading to it. Real-time data may identify congestion, but intelligence creates value only if the destination is capable of responding. A digital map may identify the shortest walking route, but that route still needs to be safe and usable.

The future intelligent destination will therefore be neither purely physical nor purely digital. Increasingly, the two will have to work together.

Intelligence must remain accessible

There is another reason why technology cannot stand alone.

Not every traveller will have the same digital capability. Connectivity may fail. A mobile phone may run out of battery. An international visitor may not have immediate data access. Elderly travellers, persons with disabilities or people unfamiliar with a particular application may require different forms of assistance.

An intelligent destination should therefore provide alternatives.

The **Ministry of Tourism's Swadesh Darshan 2.0 Guidelines (2022)** recognise this issue. While providing for online information, feedback and grievance mechanisms, the framework also envisages physical assistance for people who may not have access to technology. [vi]

The principle is wider than the provision of a help desk:

Digital convenience should expand accessibility, not create a new barrier to it.

Physical signage, maps, visitor information centres and human assistance therefore continue to matter even as destinations become increasingly digital.

From information to intelligence

A useful distinction is between information and intelligence. Knowing how many visitors entered a destination is information. Understanding where they concentrated, when congestion developed, what services they required and which parts of the destination remained underused begins to create intelligence.

Its value appears when that understanding changes a decision: transport is adjusted, an alternative attraction is recommended, opening hours are reconsidered or infrastructure investment is better targeted. At the individual level, a list of attractions is information; selecting and sequencing the most appropriate ones around a traveller's time, mobility and other needs is intelligence.

An emerging model in practice

Spain provides a useful illustration of how this broader understanding is already influencing destination management. Through its **Smart Tourist Destination (Destinos Turísticos Inteligentes) programme**, developed by SEGITTUR, Spain has created a methodology around five interconnected dimensions—**governance, innovation, technology, sustainability and accessibility**. [xi]

Technology is therefore not treated in isolation. It operates alongside the institutional, social and physical capabilities of the destination.

The significance of the Spanish approach lies not merely in adopting digital solutions, but in creating a framework through which destinations can assess and continuously improve the way they are managed. By 2026, the methodology had been implemented in more than 255 destinations, providing an established example of how the idea of an intelligent destination can move from individual technological interventions towards a broader destination-management system. [xii]

The terminology may differ, but the direction is significant. Destination Intelligence increasingly lies at the intersection of **physical capability, human service, institutional coordination and digital intelligence**.

From capability to intelligence

Seen from this perspective, an intelligent destination performs five connected functions. It understands the traveller, visitor flows, its assets, constraints and changing demand. It enables the journey through infrastructure, mobility, accessibility, information, hospitality and services. It connects these components, responds through human judgement, institutional capability and data, and improves through feedback and learning.

Technology can strengthen each of these capabilities, with artificial intelligence increasingly able to interpret context, anticipate requirements and personalise the traveller's interaction with a destination. Its effectiveness, however, still depends on the quality of the ecosystem to which it is connected. For the traveller, the test is simple: Can I access, understand, navigate and experience this destination easily? For the destination, the corresponding question is: Do we understand what is happening well enough to anticipate needs, coordinate resources and improve that experience?

Destination Intelligence is therefore demonstrated less by the framework adopted or the technology deployed than by what changes as a result: better movement, less friction, more responsive management, greater discoverability, improved accessibility and more effective use of destination assets.

That takes the discussion from concept to practice: Intelligence in Action — Learning from Destinations.

3. Intelligence in Action — Learning from Destinations

There is no single model of an intelligent destination.

The challenges of a pilgrimage city receiving millions of visitors are very different from those of a mature European tourism destination, an Asian city managing congestion, or a destination seeking to distribute tourism benefits more widely among local communities. Technology, infrastructure, governance, community participation and data may therefore assume different levels of importance in different places.

What makes these experiences useful is not their similarity, but what each teaches us about **turning intelligence into action**.

Kerala — looking beyond the established tourism circuit

Kerala's tourism story has long demonstrated the value of destination positioning and sustained marketing. But its more recent Responsible Tourism initiatives provide another lesson: a destination must also consider **where tourism takes place and who participates in the value it creates**.

Kerala's Responsible Tourism Mission has progressively sought to connect tourism with local communities, livelihoods, traditional activities and local enterprise. One particularly relevant initiative is the **STREET project — Sustainable, Tangible, Responsible, Experiential, Ethnic Tourism Hubs**.

Kerala Tourism identifies a problem familiar to many successful destinations: tourism activity becomes concentrated in limited spaces. This can put pressure on the physical carrying capacity of popular locations while restricting the economic benefits of tourism to relatively small geographical areas. STREET responds by identifying and developing thematic zones around agriculture, village life, culture, cuisine, water and art, supported by local communities and Local Self Governments.

The process itself is instructive. It includes tourism-resource mapping, identification of micro-destinations, training and capacity building, creation of local tourism units, signage, waste management, product development and marketing. [vii]

The intelligence here is not primarily technological. It lies in **understanding the destination's underused assets, recognising where visitor activity is concentrated and connecting new tourism experiences with local capability.**

This does not mean that all of Kerala's destination challenges have been resolved. Strong destination marketing can generate demand faster than infrastructure, mobility and visitor services develop uniformly across a state. The distinction made earlier in this paper therefore remains important: successful destination marketing is not by itself evidence of a completely intelligent destination.

The lesson from Kerala is narrower, but valuable: **intelligence can help a destination look beyond its established attractions, distribute tourism activity more widely and connect tourism more closely with the communities through which it operates.**

Varanasi — when growing demand tests the destination

Varanasi presents an almost opposite challenge.

Its difficulty is not generating demand. It is managing extraordinary volumes of it.

The **Government of India, Ministry of Road Transport and Highways, in 2026** reported that Varanasi receives more than **15 crore tourists and pilgrims annually**, placing substantial pressure on its urban transport network. The Government specifically identified congestion on important arterial roads and long travel times to major religious, cultural and educational locations as significant challenges. [viii]

Considerable investment has already been made in the city and its tourism infrastructure. Yet the experience of Varanasi demonstrates an important reality: **infrastructure creation and destination capacity do not always move at the same speed as visitor demand.**

The areas around Kashi Vishwanath and the ghats can still experience extremely heavy crowding. Long queues and waiting times for darshan add another dimension to the visitor experience. Road congestion elsewhere in the city can make relatively short journeys unpredictable. These pressures are particularly significant because pilgrimage demand has expanded rapidly and domestic tourism has become increasingly important.

The response is now moving towards a much larger mobility intervention. In 2026, the Government approved the Greenfield Ganga Elevated Corridor as part of the wider effort to improve Varanasi's urban connectivity. The planned network is intended to improve links between national highways, railway stations, the airport, inland waterways and major destinations including Kashi Vishwanath Temple and the ghats. Because this infrastructure is still

to be developed, its projected benefits should be treated as **anticipated outcomes rather than demonstrated results**. [viii]

Varanasi therefore gives us a useful lesson precisely because its story is unfinished.

Destination Intelligence must be able to recognise when the success of a destination is itself creating new friction. Increasing visitor numbers are not sufficient evidence of destination success if mobility, crowd management, waiting time and the overall visitor experience come under increasing pressure.

Ayodhya presents a related but somewhat different situation. Rapid growth in pilgrimage has been accompanied by substantial investment in the airport, railway station, roads, visitor facilities and local mobility. But Ayodhya too remains a destination in transition. Both destinations demonstrate the need to anticipate capacity requirements rather than respond only after visitor numbers have overwhelmed existing systems. [ix] [x]

For India's rapidly growing pilgrimage destinations, intelligence will increasingly require **demand forecasting, infrastructure planning, crowd management, last-mile mobility and real-time information to work together**.

Spain — making intelligence part of destination management

While Varanasi demonstrates intelligence responding to a rapidly emerging capacity challenge, Spain provides an example of intelligence being progressively embedded into the destination-management system itself.

Spain's **Smart Tourist Destination — Destinos Turísticos Inteligentes (DTI) — model**, promoted through SEGITTUR, is built around five interconnected dimensions: governance, innovation, technology, sustainability and accessibility. [xi]

The significance of the model is not simply that destinations deploy digital technology. They are encouraged to diagnose their capabilities, identify gaps, develop actions and continuously evaluate their progress.

After more than a decade of implementation, **SEGITTUR's Analysis of the Smart Tourist Destination Model: The Perspective of Destinations (2026)** provides useful evidence of how the approach has evolved. The methodology has been implemented in more than 255 destinations. The evaluation concludes that the model has increasingly become a destination-management framework, contributing to professionalisation of tourism management, improved governance and accelerated digitalisation, while also identifying continuing challenges in areas such as measuring outcomes and availability of resources. [xii]

This is important because it demonstrates that becoming an intelligent destination is **not a one-time technology project**.

It is a management process.

Destinations change, technologies change, traveller behaviour changes and new pressures emerge. Intelligence therefore has to become part of the institution's capacity to diagnose, coordinate, measure and improve.

Spain's experience also reinforces another argument developed in this paper: **technology becomes more useful when it sits within governance and institutional capability rather than operating separately from them.**

Kyoto — returning intelligence to the traveller

Kyoto provides a much more immediate example.

Like many highly visited heritage destinations, Kyoto has to manage significant concentrations of visitors around popular attractions and at particular times of the day. Rather than treating congestion only as something for destination managers to measure internally, Kyoto makes some of that intelligence available directly to the traveller.

The **Kyoto Travel Congestion Forecast** provides congestion forecasts for major sightseeing areas, showing expected crowd levels by location and time of day. It supplements forecasts with real-time information from live cameras and suggests comparatively less crowded places to visit. [xiii]

The system allows a traveller to make a simple but potentially important decision: **perhaps visit the same attraction at a different time, or choose another location altogether.**

The intelligence cycle here is remarkably clear:

Observe → Understand → Inform → Influence behaviour.

This is a significant development in destination management. Traditionally, information collected by destinations primarily helped administrators understand what had already happened. Increasingly, real-time and predictive information can be returned to visitors while they are still making decisions.

The traveller then becomes part of the destination-management response.

Kyoto therefore demonstrates how Destination Intelligence can move beyond simply collecting data. **Information becomes valuable when it reaches the person who can act on it at the time when the decision is being made.**

Singapore — building the capacity to experiment

Singapore offers yet another lesson: intelligent destinations also need the capacity to **experiment with technology and scale what works**.

The **Singapore Tourism Board's Tcube — Tourism Technology Transformation Cube — Centre of Excellence** follows a *Learn–Test–Scale* approach. It provides tourism businesses with access to technology, data capabilities, networks and opportunities to experiment with new solutions. Its initiatives include the use of data analytics to improve business decisions and visitor experience, as well as platforms that connect tourism businesses with technology providers. [xiv]

The importance of this approach lies not in any single application.

Technology changes too quickly for a destination to assume that today's solution will remain the best solution tomorrow. Artificial intelligence makes this even more relevant. Conversational interfaces, personalisation, predictive systems, translation, automated assistance and increasingly agentic technologies are likely to change the way travellers interact with destinations.

The destination therefore needs more than technology. It needs **the institutional capability to learn, test and adapt**.

Singapore's approach provides a useful counterpoint to the other examples. Kerala demonstrates intelligence through community and destination assets; Varanasi through the challenge of infrastructure and capacity; Spain through governance and systematic destination management; Kyoto through real-time visitor information.

Singapore demonstrates the importance of creating an **environment in which new intelligence can continuously be tested and incorporated into the tourism ecosystem**.

Different destinations, different intelligence

These examples demonstrate why Destination Intelligence cannot be reduced to a checklist of technologies.

Kerala does not need to become Singapore. Varanasi cannot simply import Kyoto's solution to congestion. Spain's institutional framework cannot be transplanted unchanged into every destination.

Each destination begins with a different set of assets, constraints, visitors, institutions and priorities.

What can be transferred is not necessarily the solution, but the **way of thinking**.

Understand the problem before choosing the technology. Recognise where the traveller encounters friction. Identify what information is missing. Connect

institutions that need to act together. Use technology where it improves the response. Measure what changes. And continue learning.

Seen together, the experiences also begin to validate the five capabilities identified in the previous section:

Understand → Enable → Connect → Respond → Improve.

Kerala demonstrates the importance of understanding and connecting local assets and communities. Varanasi shows why destinations must understand changing demand and enable the infrastructure required to support it. Spain demonstrates how intelligence can become part of continuous institutional improvement. Kyoto shows how understanding can lead to real-time response. Singapore illustrates the capacity to experiment, learn and improve.

No destination represents a finished model of intelligence. Nor should it.

The more important lesson is that **an intelligent destination is one that continues to learn from what is happening within it and has the capability to act on that learning.**

Once intelligence begins to influence decisions, however, another question arises: **what value does it actually create?**

Better information or more sophisticated technology has little significance unless it improves something—visitor experience, mobility, use of destination assets, local participation, sustainability, resilience or the quality of destination decisions.

That moves the discussion from **intelligence in action to intelligence creating value**—the subject of the next section.

4. From Intelligence to Destination Value

Over the years, whenever I have looked at tourism performance, the first numbers on the table have usually been familiar ones: **How many tourists came? How much did they spend? How many hotel rooms were occupied? How much revenue was generated?**

These numbers matter. I have worked with them myself, and no tourism business or destination can ignore them.

But increasingly, I find myself asking another question:

What did those numbers actually mean for the destination?

If visitor numbers increased, did the visitor experience improve as well? Did local businesses participate in that growth? Did people discover more of the destination, or did everyone continue to crowd into the same few places? Did the additional demand justify better infrastructure? And, perhaps most importantly, was the destination better prepared for the next wave of visitors than it was for the previous one?

This is where the discussion on Destination Intelligence becomes more interesting.

Intelligence has little value simply because a destination knows more. A dashboard can show where visitors are going. Artificial intelligence can predict demand. A mobile application can recommend an attraction. A destination can collect enormous quantities of data.

But the real test comes afterwards:

What did the destination do differently because it knew?

That is where intelligence begins to create value.

The **OECD**, in *OECD Tourism Trends and Policies 2026*, reflects a similar shift in thinking. It observes that tourism policy is increasingly moving beyond growth alone towards a broader balance between economic value, resilience, environmental sustainability and positive outcomes for local communities. [i]

This does not make visitor numbers or tourism revenue less important. It simply asks us to look beyond them.

For the traveller, the value of intelligence may actually be quite ordinary.

The traveller does not arrive at a destination looking for a sophisticated tourism-management system. The traveller wants to know: **How do I get there? What should I see? How long will it take? Is it crowded? Where can I eat? Can my elderly parent manage the walk? Is there another way to reach the place? What can I realistically do in the four hours I have?**

If the destination can answer these questions at the right time, it is already creating value.

This is why technology and physical infrastructure cannot be separated. A highly personalised recommendation on a phone is of little use if the traveller cannot reach the place being recommended. Equally, a good transport system does not deliver its full value if a first-time visitor cannot understand how to use it.

The value lies in **joining the pieces**.

But now look at the same destination from the other side.

Suppose thousands of travellers are repeatedly searching for the same attraction. They are arriving during the same two-hour period. One road is becoming congested, while another part of the destination remains almost invisible to visitors. Hotels are full during a few months but struggle during the rest of the year.

These are not simply statistics.

They are signals.

An intelligent destination should be able to ask: **Can some visitors be encouraged to come at another time? Can another experience be made more visible? Does transport frequency need to change? Is the pressure temporary, or does it require infrastructure investment? Are we marketing a destination that our existing capacity can no longer comfortably support?**

The **OECD, in *OECD Tourism Trends and Policies 2026***, points to precisely this challenge. Tourism activity is increasingly concentrated in particular locations, creating pressure on infrastructure and communities while other places remain comparatively underused. The OECD consequently emphasises better visitor-flow management and more timely and granular information for destination decision-making. [i]

This is where intelligence starts changing the way a destination uses what it already has.

And then comes a question that tourism has sometimes been slower to ask:

Who is benefiting?

A successful tourism destination is also somebody's home.

The shopkeeper, taxi driver, hotel employee, craftsperson, restaurant owner, guide and small entrepreneur experience tourism very differently from the visitor. So does the resident trying to travel through a crowded part of the city.

The **OECD, in the chapter “Enhancing the Social Benefits of Tourism” in *OECD Tourism Trends and Policies 2026***, makes this point explicitly. Tourism can create employment, income and enterprise, but its benefits and costs are not automatically distributed evenly. It therefore argues for stronger local value creation, community engagement and wider distribution of tourism benefits. [i]

Destination Intelligence cannot itself guarantee that distribution.

But it can make the imbalance visible.

If a destination knows where visitors are spending, which neighbourhoods they rarely enter, which local products remain undiscovered, where residents are experiencing pressure and where tourism opportunities are concentrated, decision-makers have a much better basis for intervention.

This is an important distinction:

Data can reveal. Intelligence can explain. But somebody still has to act.

The same principle applies to sustainability.

A destination may continue attracting visitors even while the very assets attracting them are coming under pressure. Water, waste, heritage, beaches, mountains, public spaces and local infrastructure all have limits.

Here intelligence needs to look not only backwards, but forwards.

The **OECD**, in ***OECD Tourism Trends and Policies 2026***, increasingly connects tourism planning with resilience, risk assessment, early-warning systems and preparedness for extreme events. That expands the role of Destination Intelligence once again. [i]

Knowing what happened last season is useful.

Knowing what is happening today is better.

But being able to anticipate what may happen next can change the way a destination prepares.

This does not mean that every destination needs an elaborate predictive system. Sometimes intelligence may come from historical patterns, local experience and good planning. In other situations, real-time data and artificial intelligence may identify changes that would otherwise be difficult to see.

The principle remains the same: **anticipate where possible rather than merely react when the pressure becomes visible.**

Copenhagen — asking a wider question about value

One destination has taken this question of value particularly seriously.

Wonderful Copenhagen, in its ***Copenhagen, All Inclusive: Strategy 2024–2030***, starts from the recognition that conventional tourism accounting does not tell the complete story. [xv]

Tourism produces economic value, but it can also create environmental and social pressures. It can bring visitors and residents together, support businesses, influence city life and contribute to—or work against—the green transition.

Wonderful Copenhagen therefore asks a broader question about tourism:
what is its overall value to society?

Its **Copenhagen Compass** has been developed to understand tourism across dimensions including people, social value, innovation, socioeconomic effects, city life and the environment. The objective is not simply to measure more things. It is to understand which effects should be strengthened and which should be reduced. [xv]

I find the thinking behind this more important than the particular model.

Every destination does not need a Copenhagen Compass.

But every destination can ask the Copenhagen question:

What kind of tourism value are we actually creating?

That question takes us considerably further than counting arrivals.

It also brings us back to the central argument of Destination Intelligence.

The traveller may experience value as convenience.

A local entrepreneur may experience it as opportunity.

A resident may experience it as either better infrastructure or greater pressure.

A destination manager may see it as better utilisation of assets.

Government may see employment, revenue, sustainability and resilience.

These are not competing definitions. They are different views of the same destination.

Intelligence helps connect them.

The process can be expressed quite simply:

Data → Intelligence → Decision → Action → Value

But there is one more step.

Once an action is taken, the destination needs to know whether it worked. Did congestion reduce? Did visitors discover another location? Did a new transport connection improve movement? Did local businesses benefit? Did the visitor experience improve?

Those answers become new intelligence.

So the process does not really end with value:

Value → Measurement → Learning → Better Intelligence

And the cycle begins again.

Perhaps this is where the idea of destination value becomes more real.

When I think of the destinations I have travelled to over the years, I do not necessarily remember how sophisticated their technology was. I remember whether I could find my way easily, whether the transport worked, whether somebody could guide me when I needed help, whether I discovered something I had not planned for, and whether the destination somehow made the journey easier for me.

The traveller experiences all these things as one journey.

Behind that seemingly simple experience, however, are many decisions—about mobility, information, infrastructure, technology, local participation, visitor management and sometimes even something as basic as a signboard placed at the right location.

This is why I find the idea of Destination Intelligence so compelling. Its value does not finally lie in the amount of data a destination possesses. It lies in whether the destination can **notice what the traveller needs, understand what is happening around it and keep making the experience better.**

These improvements accumulate. A destination that learns from each season, each pressure point and each visitor journey becomes better able to use what it already has and to prepare for what comes next.

That leaves us with the next question: if a destination can understand better, respond better and keep learning, can that intelligence itself become a competitive advantage?

5. From Destination Intelligence to Competitive Advantage

When travellers choose between destinations, the attraction itself is only part of the comparison. Some places possess experiences that cannot be replicated; many others compete within broadly similar propositions—heritage, beaches, mountains, cuisine, culture, wellness or adventure.

In those cases, differentiation increasingly depends on how the destination converts its assets into an experience: how easily it can be discovered, reached, understood and navigated; how well its services connect; and how effectively it responds when conditions change.

Assets create potential. Capability converts it into experience.

Natural and cultural assets have always been central to tourism competitiveness. But possessing an asset and converting it into a compelling visitor experience are two different things.

The **World Economic Forum, in its *Travel & Tourism Development Index 2024***, provides useful evidence of this distinction. Its framework does not assess tourism development only through natural and cultural resources. It considers 17 pillars across areas including the enabling environment, ICT readiness, transport and tourism infrastructure, tourism policy and enabling conditions, sustainability and tourism resources. [xvi]

The implication for Destination Intelligence is important.

A destination's resources create the reason to visit. Its capabilities determine how effectively that promise is delivered.

A heritage site may be extraordinary, but the traveller still has to reach it. A local experience may be authentic, but it has little tourism value if visitors cannot discover it. A destination may possess excellent public transport, but a first-time visitor must be able to understand it. A lesser-known attraction may have considerable potential, but the destination needs to know when and how to bring it into the visitor journey.

Destination Intelligence helps connect these pieces.

It can help a destination understand what travellers are looking for, identify where they encounter difficulty, recognise which assets remain underused and decide where intervention can create greater value.

In that sense, intelligence does not replace destination assets.

It helps the destination convert those assets into experience.

Experience becomes part of the competition

This changes the way we think about destination competitiveness.

A destination traditionally promotes what it has: its monuments, beaches, landscapes, cuisine, events, heritage or culture. Those remain fundamental. But the traveller experiences much more than the attraction.

The journey begins before arrival and continues through transport, accommodation, information, payments, food, wayfinding, queues, local mobility, accessibility and interaction with people and services.

A beautiful destination can still produce a difficult journey.

Conversely, a destination that understands these points of friction can progressively remove them.

This is where some of the examples discussed earlier in this paper begin to connect. Kyoto's congestion information does not create another temple. Kerala's efforts to develop tourism beyond established locations do not create another state. Spain's Smart Tourist Destination model does not manufacture new heritage. Singapore's experimentation with technology does not replace its tourism assets.

Each is trying, in a different way, to **extract greater value from the destination that already exists.**

That ability can itself become differentiating.

The advantage of seeing change earlier

There is another dimension of competition that is becoming increasingly important.

Destinations are not operating in a stable environment.

Traveller expectations change. New source markets emerge. Technology changes how people search and plan. Climate and extreme weather affect seasons and destinations. Congestion can alter resident attitudes. A viral recommendation can suddenly redirect visitor demand towards a location that was never designed for large numbers.

An attraction may remain where it has stood for hundreds of years.

The environment around it can change remarkably quickly.

This makes adaptability a competitive capability.

The **OECD, in *OECD Tourism Trends and Policies 2026***, observes that technological, demographic, environmental and geopolitical changes are reshaping how tourism is developed, managed and experienced. It calls for more flexible, anticipatory and coordinated approaches and identifies better data, digital tools and artificial intelligence as increasingly important to evidence-based destination management. [i]

The significance of intelligence here is not that a destination will always predict correctly.

It is that the destination becomes better equipped to **notice change earlier.**

A shift in booking patterns may signal changing demand. Repeated congestion at a particular time may indicate the need for visitor-flow intervention. Search behaviour may reveal emerging interest in an overlooked experience. Weather patterns may require a rethink of seasonality. Visitor feedback may expose a problem long before it becomes visible in arrival statistics.

The competitive advantage is therefore not simply knowing more.

It is shortening the distance between **signal and response**.

Doing more with what already exists

This is particularly important because destination development cannot always mean building something new.

Large infrastructure investments take time and capital. Heritage and environmental constraints may limit physical development. Some destinations may simply not have the resources available to continually create new tourism products.

Intelligence offers another route.

Sometimes the opportunity already exists but remains disconnected from the visitor.

A village may possess an experience travellers would value but struggle to make it discoverable. A museum may have unused capacity at particular times. A transport service may exist but remain difficult for visitors to understand. A destination may have an attractive shoulder season but continue concentrating its marketing in peak months. Local businesses may offer authentic products yet remain outside the mainstream visitor journey.

In each case, the first question need not be:

What more should we build?

It may be:

What are we not using well enough?

That is a different way of thinking about competitiveness.

It moves destination strategy from continuous addition towards **better utilisation, better connection and better interpretation of existing assets**.

Technology accelerates the capability—but does not define it

Technology can accelerate this capability. Artificial intelligence can analyse patterns at a scale that human observation alone cannot; real-time data can reveal visitor movements as they occur; conversational systems can make discovery more responsive to individual need; and predictive tools can support forecasting of demand, congestion or changing preferences.

The OECD, in OECD Tourism Trends and Policies 2026, notes that digitalisation and AI are enabling more personalised services, supporting real-time visitor-flow management, improving forecasting and strengthening the evidence base for tourism decisions. The competitive point, however, is not the technology in isolation but the speed and quality with which insight can be translated into action. [i]

That translation still depends on technology, infrastructure, people, institutions and local knowledge working around the needs of the destination and the traveller.

There is no single journey towards intelligence

This is also why there cannot be one standard route for every destination.

A destination struggling with congestion may begin with visitor-flow information.

Another may need to address last-mile connectivity.

A smaller destination may first need better digital visibility for its local experiences.

A mature destination may need to understand resident sentiment, carrying capacity or changing visitor behaviour.

Another may already have extensive infrastructure but need stronger coordination between agencies and service providers.

The starting point should therefore not be:

Which technology should we adopt?

It should be:

What do we need to understand better?

From there, the progression developed through this paper becomes practical: Understand → Enable → Connect → Respond → Improve. It is not a fixed maturity sequence, but a continuous management discipline: identify the need, create the capability to respond, connect the relevant parts of the ecosystem, act, and learn from the outcome.

Continuity itself may be the more durable advantage. Attractions can be replicated, technology platforms purchased, infrastructure built and marketing campaigns imitated. Harder to reproduce is the capability to keep understanding the destination and its visitors, coordinate the ecosystem, respond to change and learn from experience.

The OECD, in OECD Tourism Trends and Policies 2026, similarly places competitiveness alongside resilience, sustainability, coordinated governance, digital transformation and the ability to adapt to uncertainty rather than treating competitiveness as a function of visitor growth alone. [i]

Destination Intelligence becomes a competitive capability when it shortens the distance between insight and action—and when the destination becomes better through what it learns.

Bringing the Journey Together

Across this paper, Destination Intelligence has emerged not as a single technology, platform or intervention, but as a continuing capability to understand a destination and its visitors, translate insight into action and learn from the outcome.

The framework that follows brings these elements together, tracing the journey from understanding the destination and the traveller to creating value, building competitive capability and, ultimately, becoming a destination that continuously learns and improves.

THE JOURNEY TO AN INTELLIGENT DESTINATION

FROM INSIGHT TO ACTION. FOR PEOPLE, PLACES AND A SUSTAINABLE TOMORROW.



Figure 1. Destination Intelligence Framework —
From Understanding the Destination to Continuous Intelligence

Conclusion — When a Destination Learns

This paper began with a simple question:

What makes a destination intelligent?

My first response came from an experience in Lucerne, where an unfamiliar destination became remarkably easy to navigate. The tourism office, hotel, public transport, maps and signage seemed to work together around the traveller. I described it as **“intelligence without internet.”**

Having travelled through the idea of Destination Intelligence in this paper, I would retain that thought—but extend it.

Technology has fundamentally changed what destinations can know and what they can do with that knowledge. Data can reveal patterns that were once difficult to see. Artificial intelligence can help interpret needs and anticipate them. Digital platforms can connect information and services, while real-time systems can help destinations respond while the visitor journey is still taking place.

But technology alone does not make a destination intelligent.

Intelligence begins to matter when a destination can connect what it knows with what it does.

That requires understanding both sides of the journey—the traveller and the destination itself. It means recognising visitor needs and points of friction, but also understanding infrastructure, capacity, local assets, communities and the pressures that tourism creates.

The real test, therefore, is not how much information a destination possesses, but whether that understanding leads to better decisions and better experiences. Can movement become easier? Can information become more useful? Can lesser-known experiences become discoverable? Can pressure be anticipated rather than merely managed after it occurs? Can tourism value reach more people and places? And can the destination learn from what worked—and what did not?

This is why Destination Intelligence cannot be treated as a technology project with a finishing date. It is a **continuous capability to understand, enable, connect, respond and improve.**

As traveller expectations, technologies, climate pressures and patterns of demand continue to change, that capacity to learn may become one of the most important capabilities a destination can build.

The destination of the future will therefore not necessarily be the one with the most attractions, the most technology or the most data. It will be the one that

can bring its **assets, people, infrastructure, institutions, services and technology together intelligently—and continue learning from the experience.**

And perhaps that brings us to the simplest answer to the question with which we began:

An intelligent destination is not one that knows everything.

It is one that keeps learning—and becomes better because of what it learns.

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