Coolcations and Green Tourism: Five Trends Transforming Northern European Travel

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INTRODUCTION

The quiet rise of Northern Europe on the global travel radar

Mild climate, a sense of adventure, untouched nature, sustainability, and cutting-edge architecture—**if travel were a recipe, these would be the key ingredients**. And in recent years, they've made the countries of Northern Europe some of the fastest-rising tourist destinations.

Global tourism data shows that visitors are increasingly drawn to exactly what these regions offer so authentically: **outdoor experiences, breathtaking landscapes**, **a deep respect for the environment**, **modern infrastructure**, and **cities designed for people**. It's a combination that appeals to a growing range of travellers—from couples and solo adventurers to families with children.

But there's more: one of the key reasons behind Northern Europe's growing appeal—especially in the summer months—is a now undeniable **shift in climate**. More and more travellers are opting for cooler destinations to escape the extreme heatwaves affecting Southern Europe.

It's the rise of so-called coolcations—cool-weather holidays—which has seen a sharp uptick in 2024. According to the [European Travel Commission](), over **22% of European travellers** say they plan to avoid overly hot destinations during the summer, choosing instead to head north.

It's no surprise, then, that according to Statista, the tourism market in Northern European countries is expected to **grow by 2.63% annually between 2024 and 2029**, reaching a total value of **$22.6 billion**.

Norway, Sweden, and Finland have been quick to capitalise on the post-pandemic travel trends—such as the desire to spend more time in unspoiled nature and wide open spaces, the appeal of destinations free from overtourism, and a growing focus on sustainability and responsible tourism.

And now, they're reaping the rewards.

- In 2024, **Norway** hit an all-time record with nearly **38.6 million overnight stays**—an increase of **4.2% compared to 2023**.
- **Sweden** saw a **2.1% rise in tourist arrivals** in the first four months of 2024 compared to the same period in 2023, and a **7.3% increase compared to 2019**.
- In **Finland**, the number of international overnight stays rose by **9% in the first half of 2024** compared to the previous year. In June alone, the increase reached **13%**—the highest among the Nordic countries.

What the data says: Exploring tourism trends in Norway, Sweden and Finland

To better understand the travel trends shaping tourism in Northern Europe, The Data Appeal Company – in partnership with Mabrian (both part of the Almawave Group) – turned the spotlight on three of the region's most popular destinations: **Norway, Sweden, and Finland**.

Using the destination management platform **D / AI Destinations**, the team was able to monitor sentiment expressed across thousands of online reviews, track hotel rate trends across OTAs, and assess the impact of key events. Mabrian contributed vital insights on **Share of Searches (Travel Intent)**, top travel drivers, and the evolution of **air capacity**, revealing the broader movements in international demand.

By combining these different data sets, we've built a clear and comprehensive picture of these Northern destinations – and the motivations behind the growing number of travellers choosing to visit them.

Inside the report, we answer some of the key questions shaping tourism in the Nordics:

- *How important is nature as a travel driver?*
- *When are the peak periods – and how much are travellers willing to spend during high season?*
- *How are travel intent and air capacity evolving across source markets?*
- *What do tourists love – and what still needs work?*
- *Which events attract the most attention, and what is their economic impact?*

Analysing the latest tourism trends across Scandinavia gives DMOs, operators, and destinations the insights they need to navigate change and shape strategies that deliver real impact.

5 key trends that are shaping tourism across the Scandinavian region

01

1. Nature over culture: Green experiences drive sentiment and shape travel decisions

National parks, fjords, botanical gardens, and open-air museums are just some of the attractions that draw millions of tourists to the Nordic countries every year.

A large-scale analysis of online reviews from the past 12 months, conducted using the **D / AI Destinations platform**, reveals just how powerful nature is as a travel motivator in these regions—highlighting patterns shared across all three countries.

- The **Attractions** sector—which covers everything from **museums and churches to scenic viewpoints, parks, and botanical gardens**—consistently scores high, with sentiment ratings hovering around or above 90 out of 100. That's a strong sign of just how satisfied visitors are.
- While many of the top-rated spots are in capital cities, most are open-air, showing how closely urban life is tied to nature—a connection travellers clearly value.
- And it's not just about positive reviews. These outdoor and nature-focused attractions also stand out for the sheer number of comments they receive, confirming just how popular they really are.

Comments and digital traces for each country give us a clear picture of tourist preferences and behaviours across the three destinations examined.

Norway

- In Norway, the overall Sentiment Score is an impressive 85/100—but attractions stand out even more, with a remarkable score of 91.5/100. British and French travellers emerge as the most satisfied with their experiences.
- More than 16% of all online reviews about attractions in the past 12 months focus on natural sites—especially parks, which account for 8% and enjoy an excellent sentiment rating of 93/100. Though less frequently reviewed, scenic viewpoints and hiking activities are just as well loved, also scoring 93/100.
- Among the top five most-reviewed attractions overall, many are open-air destinations. Over the past year, second only to Oslo's Munch Museum is Vigelandsparken—an open-air sculpture park that has earned an outstanding Sentiment Score of 95/100. It's part of the larger Frognerparken, the capital's biggest park, which also made it into the top five.

Sweden

- In Sweden, attractions have also recorded a strong Sentiment Score over the past 12 months, reaching 90.1/100, while the overall sentiment sits at 83.3/100. British and German travellers appear to be the most satisfied with their experiences.
- One in four reviews in the attractions category focuses on outdoor and nature-based sites, which account for more than 25% of the total. Parks and botanical gardens receive the highest praise, with a sentiment score of over 91/100.
- Among the top five most-reviewed attractions, Skansen ranks third. Founded in 1891, it's the world's oldest open-air museum and remains one of Sweden's most beloved destinations, with a sentiment score of 90/100. In fifth place is Kungsträdgården—"The King's Garden"—one of Stockholm's oldest and most central public parks, well known for its ice-skating rink and beautiful cherry blossom display, scoring an impressive 92/100.

Finland

- In Finland, attractions continue to hold the highest Sentiment Score among tourism categories, reaching 89.6/100—slightly lower than in neighbouring destinations, but still strong. Overall sentiment across the country sits at 85.2/100, driven largely by positive feedback from British and French visitors.
- Outdoor sites make up a significant share of the conversation: 24% of all attraction-related reviews mention open-air locations such as parks (+11%), lakes, and similar natural settings.

- All of the most-reviewed Finnish attractions in recent months are located in the capital, Helsinki. At the top of the list are iconic landmarks like Temppeliaukio Church—better known as the Rock Church—and the sea fortress of Suomenlinna. Further down, in seventh place, is Esplanadi—Helsinki's elegant green promenade—earning an outstanding Sentiment Score of 91.6/100.

	% of reviews about natural attractions	Average Sentiment (Attractions)
Norway	16.4%	91.5/100
Sweden	25.6%	90.1/100
Finland	24.0%	86.6/100

Source: DESTINATIONS

Needs improvement · Great · Excellent

Sentiment is measured using the Sentiment Score, rated on a scale of 0 to 100

In a tourism landscape increasingly shaped by sustainability, quality experiences, and the pursuit of well-being, nature stands out as a true hallmark of the Scandinavian offering. This trend not only reflects evolving traveller preferences but also provides valuable insights for enhancing the appeal of emerging destinations.

FOCUS

Nature, culture, and activities are the main reasons people travel to Northern Europe — but wellness and food are also gaining popularity

An in-depth analysis conducted by Mabrian on the key drivers behind visits to Norway, Sweden, and Finland confirms the insights gathered from digital trace data.

The data clearly show that **nature, culture, and active tourism** are the top factors influencing travellers' choices.

At the same time, the growth of some drivers, often seen as secondary, highlights these countries' strategic efforts to diversify their value proposition and broaden the experiential offerings available to a growing number of tourists.

In 2024, the three main drivers—**Nature, Culture, and Activities**—accounted for between 68% and over 76% of travel motivations in the countries analysed, confirming their dominant role.

A comparison with previous years (2022) reveals notable shifts that reflect evolving travel preferences among tourists.

The **Nature** driver is experiencing strong growth, especially in Finland (+7.8 percentual points (pp) compared to 2022) and to a lesser extent in Sweden (+3.1 pp). It remains stable in Norway, where nature—embodied by fjords and vast national parks—continues to be the most influential factor by far (40.6%).

Culture remains the second most important driver but has seen a significant decline in both Finland and Norway (down 10.6 percentual points and 10.4 pp respectively compared to 2022).

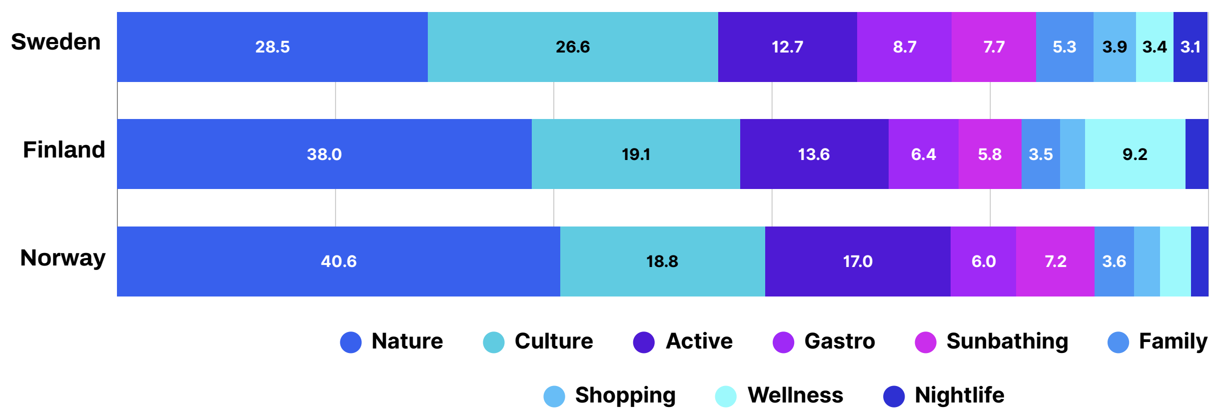
Similarly, **Active Experiences**, while stable as the third driver overall, have decreased in Sweden (-8.3 pp) and Finland (-6.4 pp).

In **Finland**, nature remains the core of the country's tourist appeal (38%), but a second distinctive driver is emerging: wellness. Accounting for over 9% of travel motivations (up 1.9 pp), wellness is becoming an important differentiator.

The growth of the culinary driver (Gastro) is noteworthy across all three countries:

Sweden: Now the fourth most popular travel motivation (8.7% of the total), up 2.9 pp compared to 2022	**Finland**: Up 3.8 pp	**Norway**: Up 3.2 pp

Tourism drivers in the Nordic countries in 2024 (%)



Source:

MABRIAN
FULLCYCLE TRAVEL ANALYTICS

2. Visitors rate the attractions highly, but raise concerns over access and prices

Attractions are the highest-rated tourism category across all three countries analysed. **But what factors most influence how travellers perceive their experience**?

A semantic analysis of online reviews—covering both natural and cultural attractions—paints a distinctly positive picture.

Visitors particularly appreciate the atmosphere, the beauty of the surroundings, the views, and the overall experience in museums, parks, and landmarks.

Across Norway, Sweden, and Finland, two aspects consistently stand out with the highest sentiment scores: position and atmosphere.

- **Norway**: **93.6** (position), **89.1** (atmosphere)
- **Sweden**: **93.9** (position), **90.4** (atmosphere)
- **Finland**: **93.4** (position)

This reinforces Northern Europe's ability to deliver authentic, well-curated experiences in memorable settings.

However, when looking at the themes with the lowest Sentiment Scores, some areas of concern do emerge—particularly around **accessibility, organisation, and costs**. Although these topics appear in less than 5% of the total reviews analysed, they generate sentiment levels that are noticeably below average, with scores dropping as low as:

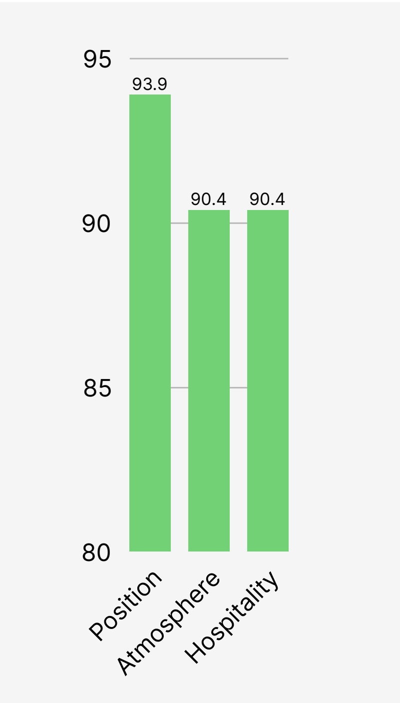
- **Norway**: Accessibility scores as low as 60.5/100, with common issues including stairs, lack of elevators, and uneven access.
- **Sweden**: Organisation records the lowest score at 40.6/100, with complaints often related to queues, restroom availability, and entrance management. Accessibility also shows room for improvement, scoring 72/100.
- **Finland**: Accessibility receives a sentiment score of 68.5/100, pointing to similar concerns around ease of access.

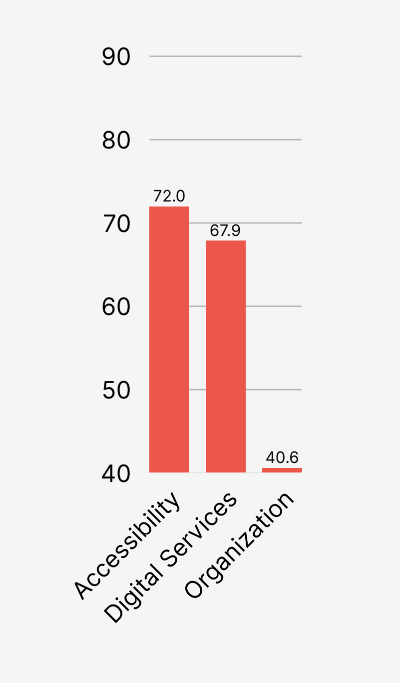
Costs also receive comparatively lower sentiment scores: 77.8/100 in Norway and 81.8/100 in Finland. This may reflect a degree of dissatisfaction with the perceived value for money.

Attractions

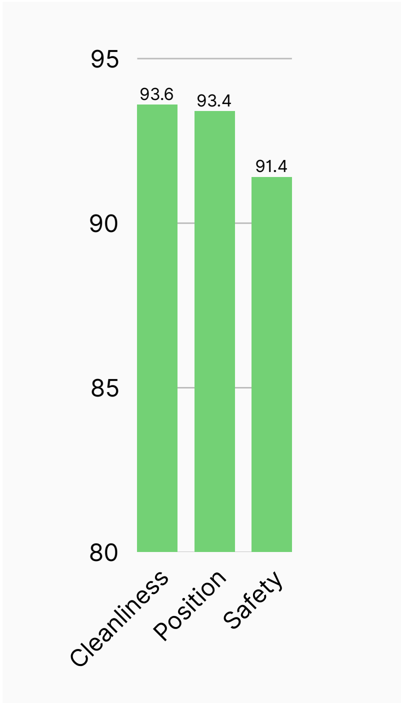
Most and least discussed topics in digital traces

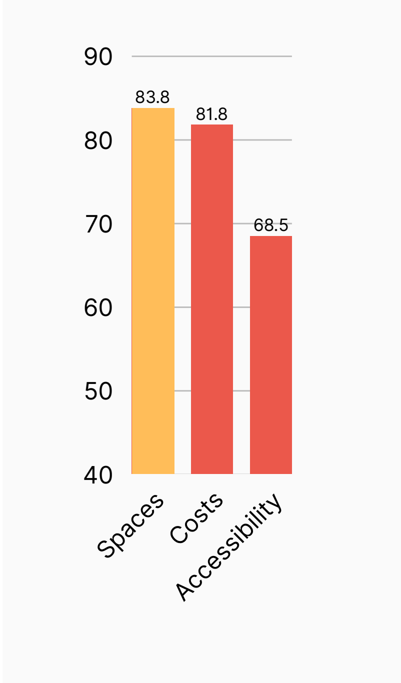
SWEDEN



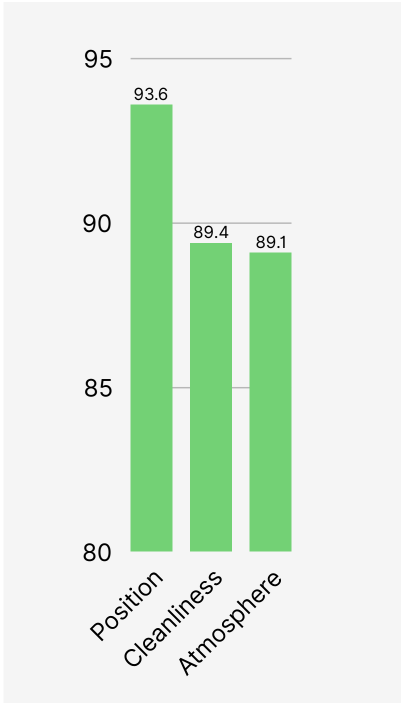


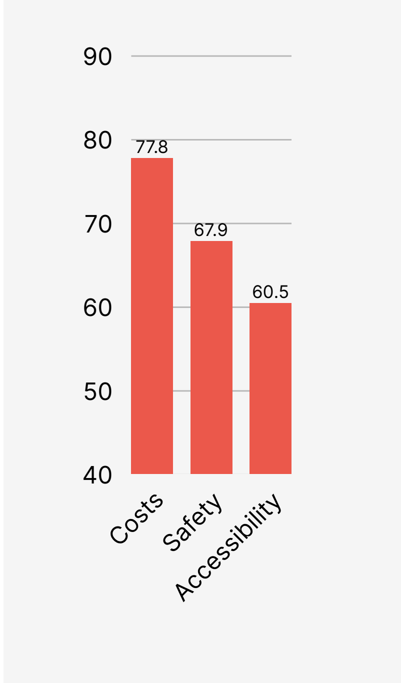
FINLAND





NORWAY





Needs improvement **Great** **Excellent**

Sentiment is measured using the Sentiment Score, rated on a scale of 0 to 100

While these critical areas are relatively minor in terms of volume, they can still impact overall satisfaction—**particularly during peak season and for visitors with reduced mobility**.

That said, it's worth highlighting the many ongoing initiatives that reflect the Nordic countries' commitment to making tourism more accessible and inclusive. There is a clear recognition of the need to address these challenges to enhance the visitor experience as a whole.

For example, Finland's national tourism strategy for 2022–2028, "**Achieving more together – sustainable growth and renewal in Finnish tourism**", identifies accessibility as one of the four key priorities for the sector's sustainable development.

Norway's **National Tourism Strategy 2030** also highlights the importance of accessibility as a core element of sustainable tourism development. It promotes the concept of Universal Design as a prerequisite for ensuring universal human rights, as well as social and economic sustainability.

3. OTA rates and demand trends: Three travel trajectories in Northern Europe

An analysis of hotel and short-term rental rates on major online booking platforms such as Booking and Expedia offers insight into both the positioning strategies of the three countries and the ebb and flow of tourist demand throughout the year.

In Norway, Sweden, and Finland alike, **online rates have increased over the past 12 months compared to the previous year—a clear sign of growing interest from the international market.**

However, while there are shared seasonal trends—such as a noticeable uptick in **May**—each country displays distinct pricing behaviours, reflecting different market identities and strategic positioning.

Norway: Signs of year-round appeal emerging

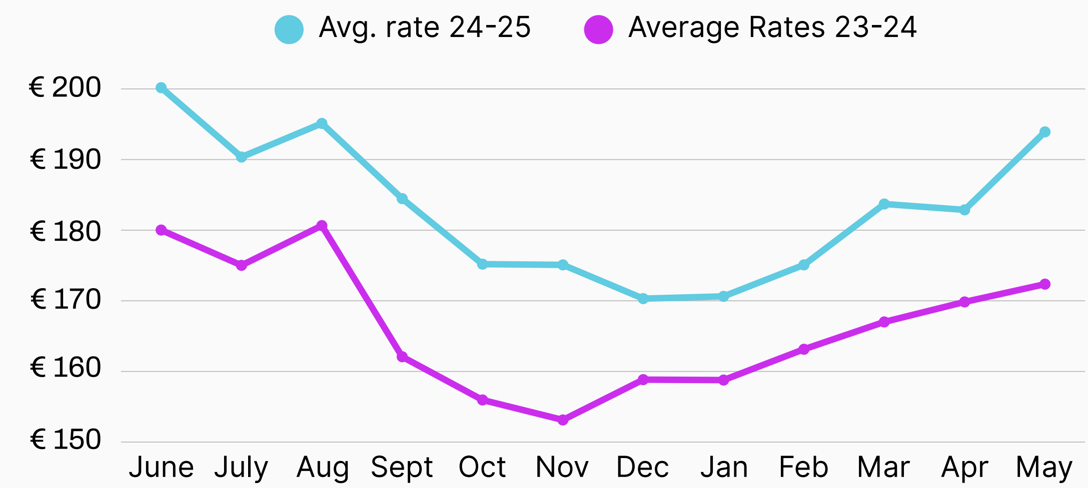
Norway not only has the highest average rates throughout the year but also shows the strongest growth compared to the same period last year.

The months with the highest average rates perfectly align with peak tourist seasons—May through August—when the average nightly rate hovers around €200.

Interestingly, September, October, and November—traditionally quieter months for tourism—show the most significant increases compared to the previous year (+13-14%).

This suggests a possible shift toward demand spread more evenly across the year, with travellers increasingly willing to visit during less crowded, more affordable periods, enjoying the natural beauty while avoiding both the summer crowds and the harshness of winter.

Norway – OTA rates



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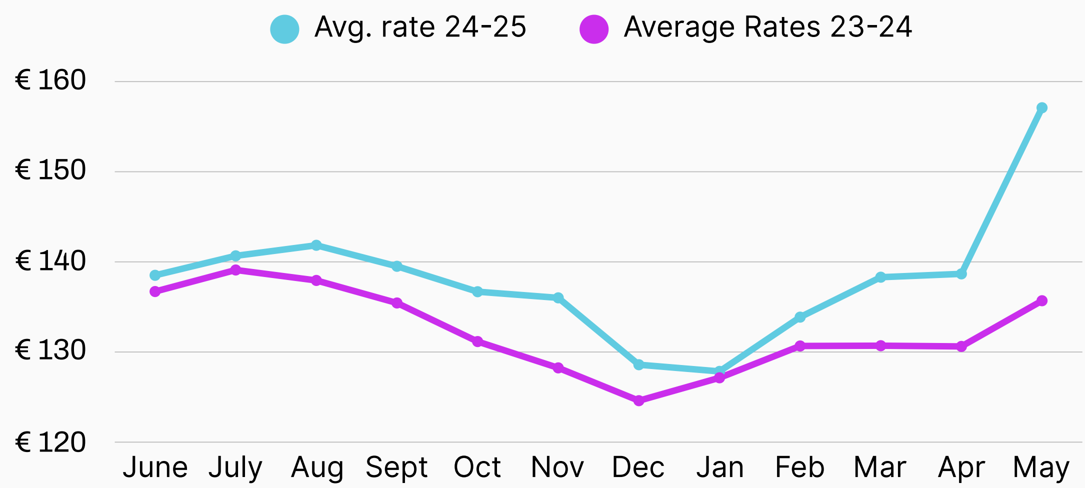
Sweden: Stable trends all year round

LUnlike Norway, Sweden has seen a more stable pricing trend compared to the previous year. Rate increases on OTAs remain modest, staying below +5% with only slight fluctuations.

The only exception is May, which again shows a notable spike in rates (+15.78%) compared to 2023–2024—possibly reflecting growing traveller interest in the so-called shoulder season months.

Sweden – OTA rates



Source: DESTINATIONS

Finland: Winter tourism increasing

In Finland, rate changes have remained modest compared to the previous year. Although prices fluctuate more throughout the year, they consistently stay within a range of €140 to €160.

Once again, May stands out as an exception, with an increase of +8.84%, temporarily aligning Finland's trend with those of Norway and Sweden.

The most distinctive feature here is the peak pricing period, which occurs not in summer but during the heart of winter—from November to March.

This is no coincidence, as Finland has increasingly linked its tourism identity to the unique experiences of Lapland. Activities like chasing the Northern Lights, husky sledding excursions, and tours of Rovaniemi—known as the "official hometown of Santa Claus"—have become major draws for adventure-seeking travellers.

Official data shows that the 2024–2025 winter season in Lapland has far surpassed expectations.

Passenger traffic at the airports of Rovaniemi, Ivalo, Kittilä, and Kuusamo grew by 19% from the previous year between November and March, while Rovaniemi itself saw a 46% jump in international arrivals in February 2025.

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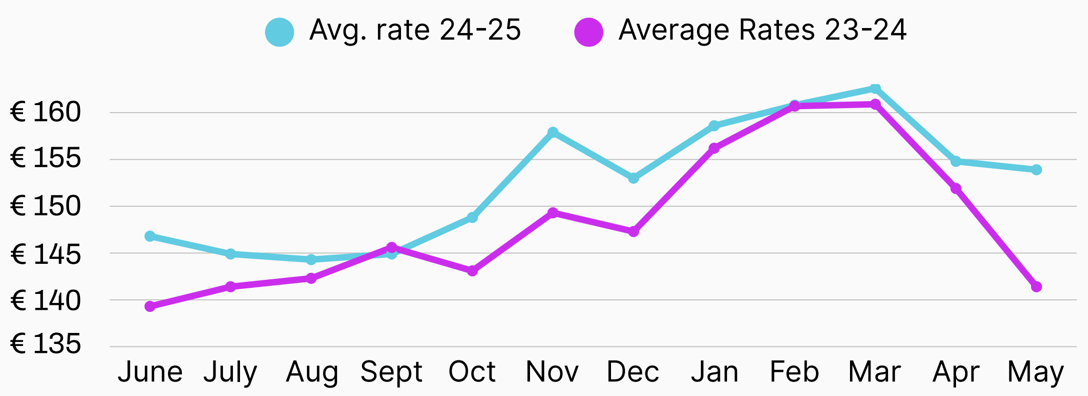
Finland – OTA rates



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May: Increasing momentum

The significant rise in average rates observed in May across all the Nordic countries analysed can be attributed to a combination of factors reflecting shifts in traveller preferences and the growth strategies of individual destinations.

Once again, this trend aligns closely with the increasing number of travellers looking to avoid destinations prone to early heatwaves by **planning their trips during the shoulder months—such as May and September—when places are less crowded and more affordable**.

But there could be another important factor at play: a rise in events attracting increasing numbers of both local and international tourists.

Thanks to the event data available on the D/AI Destinations platform, we've observed that:

In **Sweden**, events in May 2025 saw a solid increase compared to May 2024, with expected attendance up by 15% and projected spending rising by 5%. The highlight was the Gothenburg Half Marathon (May 17), attracting 240,000 attendees and generating an estimated economic impact of around €17 million.

In **Finland**, May experienced an even more dramatic surge, with attendance jumping by 257% and projected spending soaring by 669%. This growth was driven by Taitaja (May 5–8), Finland's largest trade fair and professional skills competition, which is estimated to have drawn at least 70,000 visitors and generated €9.7 million in spending.

The Nordic countries also confirm the growing importance of a well-balanced events calendar throughout the year, helping to promote a more even distribution of tourist flows across all 12 months.

4. Travel intentions and air capacity: Mixed signals for tourism growth

To anticipate tourist flows and identify the most promising markets for Northern European destinations in the coming months, Mabrian cross-referenced data on travel intent—measured through online flight search volumes (Share of Searches index)—with trends in air capacity.

Let's take a closer look at what this involves:

- The proprietary **Share of Searches index** [1] captures the travel intentions of international visitors. It's based on the total volume of organic flight searches from a specific market to a particular destination, relative to the total flight searches from that market to any destination worldwide. In other words, this index helps us understand how strongly travelers from a given country are interested in visiting each destination.
  Analysis period: summer (June–September 2025, year-on-year) and winter (November 2025–January 2026, year-on-year)

[1] Mabrian's evaluation of the Share of Searches Index is based on a three-level scale indicating increases or decreases (slight, moderate, significant). These levels are determined by the size of the percentage point changes and their relative impact on the overall index value. For a detailed explanation of the Share of Searches Index methodology, visit: ***https://mabrian.com/blog/share-of-searches-index/***

Source:

MABRIAN
FULLCYCLE TRAVEL ANALYTICS

Changes in air capacity—the number of available seats—reflect the market outlook anticipated by international airlines as well as how quickly destinations respond to potential demand.
Analysis period: June–December 2025, year-on-year

Looking at these two important data points for **Norway**, **Sweden**, and **Finland**, we see mixed signals. Travel intentions are on the rise, especially for Norway, but airlines remain cautious with their air capacity.

Germany is a clear example: while Germans are showing growing interest in visiting these countries—summer and winter alike—the number of available seats from Germany is actually falling.

This might mean that even though the Nordic countries are attracting attention, the current political and economic instability in parts of Europe and America might be holding people back from actually booking the trip.

Norway: Travel intent rises, but flight capacity holds steady

IIn Norway, the biggest increase in flight searches is concentrated in the winter season.

The domestic market stands out as the leading source of searches in both summer and winter, with index values ranging from 2.13% to 2.34%—marking a sharp year-on-year increase (+1.02 percentual points in summer, +1.38 pp in winter).

Travel intent is also on the rise from the United Kingdom—the second-largest market by Share of Searches—especially during winter (+1.38 pp), as well as from Spain, Germany, and Denmark. The only notable decline comes from the United States, with a drop in search share in both summer (-0.10 pp) and winter (-0.38 pp).

Looking at air capacity over the next six months, the overall number of available seats remains virtually unchanged compared to 2024 (+0.2%). However, the origin markets show some shifts: seat capacity from Denmark is up significantly (+8.7%), along with Sweden and France (+5.2%) and the Netherlands (+4%). In contrast, capacity from Germany is down sharply (-11.5%), with slight decreases also from Spain and Norway.

Sweden: Search volumes stable, moderate growth in air capacity

Travel intentions for Sweden appear more balanced compared to Norway.

During the summer, there's modest growth in search share from key source markets, particularly the UK (+0.11 pp), Norway (+0.12 pp), and Germany (+0.09 pp). On the other hand, search volumes are down from Spain, the US, and Turkey. In winter, travel intent shows a more notable year-on-year increase, driven especially by the domestic market (+0.59 pp).

Once again, air capacity to Sweden over the next six months remains relatively stable, with just a +0.6% increase compared to the previous year. Domestic flights are down (-4%), along with slight decreases from Germany, Spain, and the UK.

By contrast, air capacity from Denmark has increased significantly (+22.6%). This is accompanied by a moderate rise in flight searches from Danish travelers (+0.05 points in summer, +0.18 pp in winter), pointing to growing interest in the destination.

Finland: Winter drives growth in travel intent and air capacity

Finland is the only country among the three to see a more substantial increase in air capacity for the coming months compared to 2024, with a growth of +3.2%.

The strongest increases in international flights come from Denmark (+16.3%), Latvia (+11.3%), and the UK (+8.1%). In contrast, flights from Spain are down significantly (-7.2%), with smaller declines from Germany, Sweden, Italy, and France.

Travel intent data suggests that winter is the most popular season for visiting Finland.

In fact, the share of searches for the winter period (November 2025 – January 2026) is notably higher than for summer across many of the country's key source markets.

For example:

	United Kingdom *Share of Searches*	Germany *Share of Searches*	Spain *Share of Searches*
Summer	0.30%	0.29%	0.19%
Winter	0.78%	0.39%	0.38%

5. Big festivals shape the tourism calendar

Travel today is about more than just relaxation—it's about participation. Whether it's concerts, festivals, sports matches, or tournaments, these events increasingly serve as the main reason or catalyst for travel.

For many destinations, this shift opens exciting opportunities: attracting new visitor segments, extending the tourism season, spreading demand more evenly, and highlighting hidden gems with untapped potential.

When chosen thoughtfully and promoted strategically, events do more than draw crowds temporarily—they can become lasting engines of local economic growth and boost a destination's profile.

This is also true in the Nordic countries.
To better understand the role of major events in reshaping tourism in this region, we analysed the key events scheduled in Sweden and Finland throughout 2025, focusing on expected attendance and projected spending.

Summer and festivals are the vibrant core of the calendar

In the Nordic countries, most high-attendance, high-impact events are festivals concentrated in the summer months—from May through late August.

In Sweden, **the peak season falls between late July and mid-August, when the Stockholm Pride and Stockholm Culture Festival take place back-to-back**. Together, these events attract over 1.6 million participants and generate nearly €110 million in total spending.

It's also worth noting that Swedish winters focus on prestigious cultural events, hosting two of Europe's most renowned film festivals: **the Stockholm International Film Festival** (November), which contributes over €12 million to the local economy, and the **Göteborg International Film Festival** (January), bringing close to €16 million in spending to Swedish operators.

In Finland, the most anticipated events include **Keskiaikaiset Markkinat** (June), the country's largest medieval festival, and **Ruisrock** (July), a historic music festival that draws over 100,000 visitors along the Baltic Sea coast. While their economic impact is notable—though somewhat smaller than Sweden's top events—these two alone generate an estimated €20 million in local revenue and attract around 300,000 attendees.

During the winter months, Finland's standout events are more locally focused: the **Maata Näkyvissä Festival**, the largest Christian music festival in the Nordics popular among young people, and **Pikkulaskiainen**, a traditional university carnival featuring sled races, live music, and celebrations.

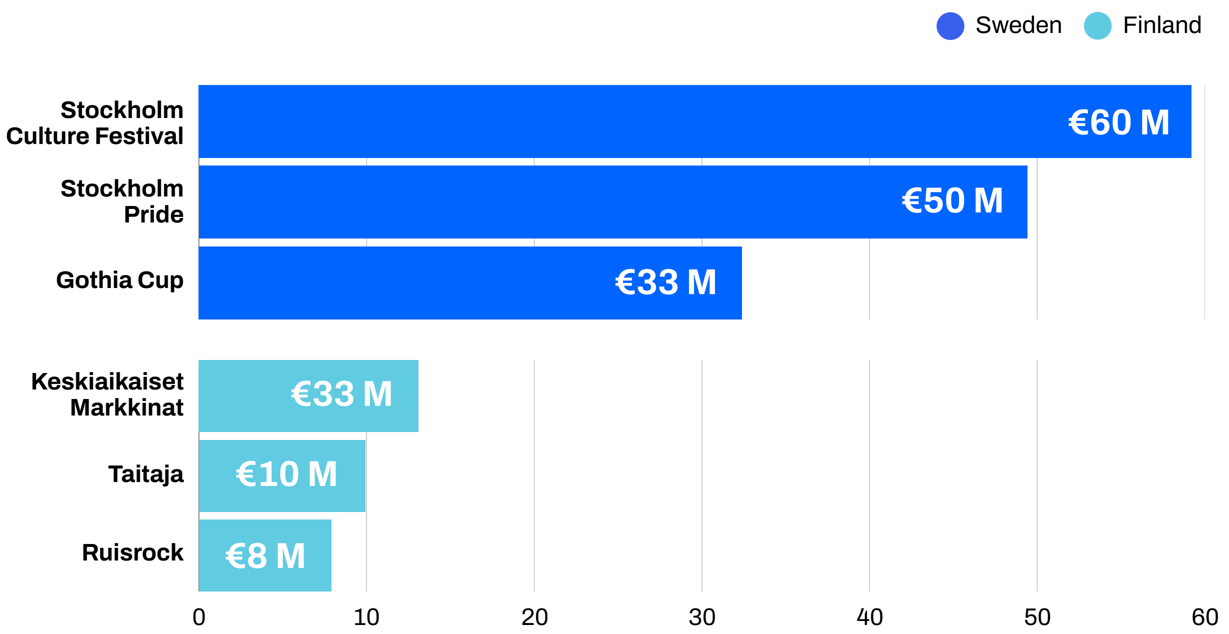
Different audiences, tailored events

One of the strengths of Nordic events lies in their variety. In **Sweden**, alongside major cultural and inclusive events, sports festivals and international concerts also stand out — think of Ed Sheeran and AC/DC live shows, or the Gothia Cup, the world's largest youth football tournament.

Finland, on the other hand, places great emphasis on local identity and immersive experiences. Beyond its major music festivals, it shines through events rooted in history and tradition, such as Sleepyhead Day and the Naantali Music Festival. These are perfect for attracting families, local audiences, and travellers seeking authentic experiences.

This means Nordic destinations don't just rely on large-scale events but also promote more niche and local celebrations, helping attract specific audiences and encouraging tourism beyond the peak seasons.

Top 3 events by economic impact – Sweden and Finland (2025)



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Helsinki: A success story in sustainable development

02

Among the most forward-thinking European destinations in sustainable, data-driven tourism, Helsinki stands out for its integrated strategy that combines clear institutional vision, active involvement of local stakeholders, and advanced data use to guide effective decision-making and continuously monitor results.

What are the key factors behind the Finnish capital's success?

Henna Siltanen, Senior Advisor for Smart Tourism and Digital Development at Business Helsinki, revealed these insights during a recent webinar organised by The Data Appeal Company.

1. A sustainable strategy built on system-wide collaboration

Helsinki claimed first place in the 2024 Global Destination Sustainability Index and received Green Destination certification the same year. Sustainability is deeply embedded in both the city's strategy and national legislation.

Over 1,200 pages of publicly available tools and reports support businesses and stakeholders in their sustainable transition, with widespread participation in **Sustainable Travel Finland**. This national programme is unique in its scope, offering operators a comprehensive toolkit to become sustainable in every sense and to obtain a certification recognised across the country.

2. A data-driven approach at every decision-making level

The city has adopted a structured Visitor Experience Management model that integrates digital surveys and behavioural data, such as sentiment and semantic analysis. Decisions are not made on intuition but based on clear, verifiable KPIs. A concrete example: the campaign message “Finland — the world’s happiest country” was only used after its impact was confirmed through data analysis.

3. Year-round steady growth

Helsinki recorded an all-time high in overnight stays in 2024. While summer remains strong thanks to the many seasonal activities, data also show growing interest in the winter months. According to Data Appeal, March and April posted the highest sentiment scores of the year, prompting the DMO to strengthen both its offerings and promotions during the colder months.

4. Active collaboration with the stakeholder network

The “Makers of Helsinki” network brings together over 150 professionals from the events, hospitality, and catering sectors. This subscription-based programme supports all stakeholders through training courses, workshops, joint data analysis, and promotional campaigns. Data is used as a tool for benchmarking, coaching, and growth, helping to enhance the online visibility and reputation of individual businesses as well as the city as a whole.

5 best practices for using tourism data to gain a competitive advantage

03

When it comes to data in the tourism sector, there's often a tendency to reduce the evidence to a series of numbers, averages, and percentage changes.

What is sometimes overlooked is the intrinsic value of that data, which—when analysed and interpreted with the right tools—can be transformed into real strategies for sustainable growth, useful insights for destination marketing, early warnings of trends, and more accurate visitor profiles.

When decisions are data-driven, the impact is tangible, reliable, and effective.

Let's explore how the very same data we analysed for Scandinavian countries can be turned into concrete actions for your own destination.

1. Sentiment data: Investing in strengths and addressing weaknesses

The Sentiment Score — that is, the level of satisfaction expressed online by visitors and residents — is the most powerful indicator to identify the strengths and weaknesses of a destination and each of its sectors.

This highly valuable information can be used proactively to guide investments, optimise returns, and train operators.

For example, if accessibility is a weak point, the destination might consider increasing investment to improve this aspect in museums, public transport, and public spaces. Conversely, if users tend to criticise service quality and hospitality in the hotel sector, the destination could organise a calendar of free events and workshops specifically aimed at this sector and its staff.

At the same time, if digital trace analysis shows that nature is a key highlight of visitors' experiences, it can become the focus of marketing and social media campaigns.

Sentiment data like those measured by Data Appeal also provide a useful tool to enrich visitor profiling: analysing sentiment variations based on country of origin or tourist type (single traveller, couple, family) will help you better understand the preferences of each target visitor and align your services accordingly.

2. Demand driver: Travel motivations shape strategic choices

It’s not just important to know when travellers arrive — it’s equally vital to understand why.

Travel motivation is a key element in tourism analysis because it highlights the destination’s most attractive features, allowing you to gain a competitive edge. Historical comparisons can reveal growth in previously secondary motivations, attracting new market segments that help diversify and extend the tourism season.

For example, in recent years visitors have shown increasing interest in the culinary sector. It’s becoming common for entire holidays to revolve around food experiences.

If the destination can measure this interest, it can choose to expand its offering of food and wine experiences, launch targeted promotional campaigns, and dedicate new website sections to the best restaurants and street food to try — all to attract new visitor groups.

Conversely, if a motivation is declining, this might indicate a shift in global trends, allowing the destination to respond swiftly to changing demands.

3. Travel intent and air capacity: Planning ahead

As we have seen, analysing travel intent by each source market provides a clear indication of potential interest in a destination.

By cross-referencing this data with air capacity figures (i.e., incoming flight seats in the coming months), destinations can anticipate possible imbalances between demand and supply.

Having advance knowledge of this data enables destinations to:

- Negotiate with airlines to open new routes or increase flight frequencies
- Strengthen communication campaigns in the most interested markets
- Optimise budgets based on seasonality and actual connectivity

4. Events: Leverage high-impact opportunities

The analysis of major events based on expected attendance and economic impact provides crucial insights for planning effective strategies — both from a tourism and promotional perspective.

A high-profile event — such as a music festival or a food fair — can serve as a powerful driver for a destination's visibility. But to truly capitalise on it, it's essential to:

- **Anticipating communication efforts** in the most strategic markets
- **Creating themed itineraries, packages and offers** around the event
- **Collaborating with cultural operators and local stakeholders** to promote integrated experiences

Well-distributed events throughout the year can also support **seasonality reduction**, ease pressure during peak months, and help **showcase lesser-known areas**.

5. Geolocated data and points of interest: broad, targeted strategies

Our destination intelligence platform, **D / AI Destinations**, now makes it possible to access highly granular data down to the level of individual **municipalities, neighbourhoods, or points of interest** (such as hotels, restaurants, bars or museums). This provides a **holistic yet detailed snapshot** of tourism trends—not just at a national or regional scale, but also at the micro-territorial level.

This enables DMOs to:

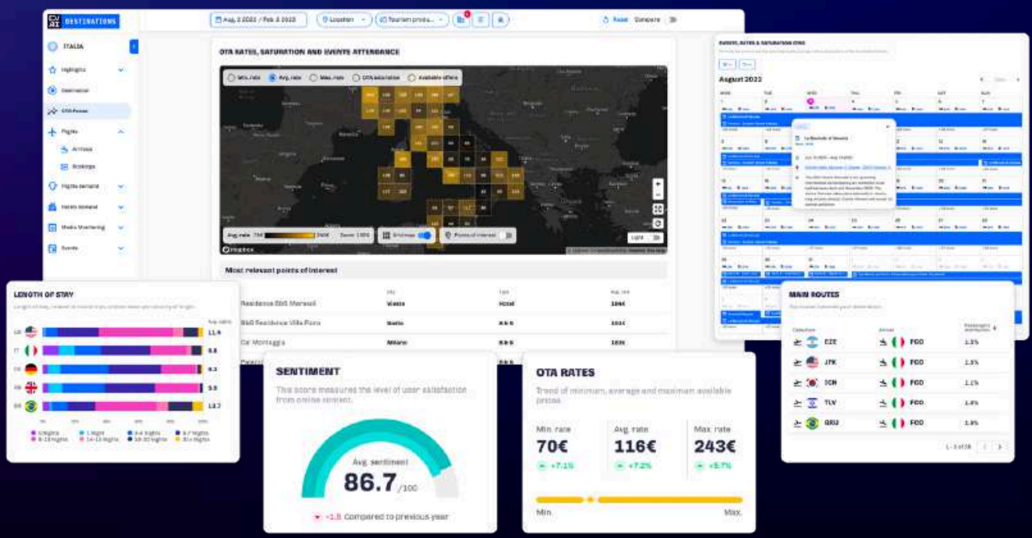
- **Distribute visitor flows more evenly** across the territory
- **Enhance the offering of emerging but promising areas**
- **Design themed and more sustainable visitor experiences**
- **Identify the most appreciated attractions and most visited locations** to better target marketing campaigns

DESTINATIONS

We simplify data

to help you make the most strategic decisions

The all-in-one platform for tourism destinations



Access precise data and ready-to-use insights about your destination, visitors, and local operators to make effective decisions and grow sustainably.

Plan innovative strategies, attract the right visitors, and gain an unmatched competitive edge.

The DMO platform, D / AI Destinations, gathers, simplifies, and consolidates everything you need to enhance the visibility and performance of your destination:

- **Flights:** searches and bookings
- **Hotel rates and occupancy** trends from online portals
- **Traveller behaviours and preferences**
- **Online reputation:** overall and by sector (hotels, restaurants, attractions, etc.)
- **Events:** analyse expected attendance and projected spending
- **Comparisons:** year-on-year and against competitors
- **Spending Module:** anonymised data provided by VISA to understand visitor spending habits
- **Personalised practical advice generated in real-time by AI** based on your destination's reviews

Request a free trial

The Data Appeal Company

The Data Appeal Company SpA (formerly Travel Appeal) was founded in 2014 and acquired in 2022 by Almawave Spa, a company listed on the Euronext Growth Milan market of the Italian Stock Exchange and part of the Almaviva group.

Utilising a proprietary algorithm based on artificial intelligence, machine learning, and semantic analysis, Data Appeal collects, measures, and analyses all publicly posted feedback online.

It merges this feedback with geographical and contextual data, helping businesses across industries leverage insights to guide decisions and gain a competitive edge.

The company's goal is to democratise and simplify the use and comprehension of data, assisting businesses and institutions in making effective and informed decisions.

This, in turn, aims to accelerate progress towards a more sustainable and inclusive world.

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