

TRAVEL + TOURISM 2025



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TRAVEL + TOURISM 2025



EXECUTIVE SUMMARY

The travel and tourism sector is a critical driver of the global economy, significantly contributing \$2.36 trillion to the U.S. economy and supporting over 18 million jobs in 2023. While the industry demonstrates resilience and recovery, with global travel reaching 88% of pre-pandemic levels, the U.S. faces challenges that impede its progress. Stricter visa requirements and infrastructure limitations are notably slowing the pace of international tourism recovery within the nation.

The travel landscape is undergoing a transformation, shaped by evolving consumer preferences and demands. There's a pronounced increase in the demand for sustainable and experiential travel options, with travelers actively seeking eco-friendly choices and culturally immersive experiences. Millennials and Gen Z are at the forefront of these shifts, prioritizing authenticity, personalized services, and technology-enabled convenience.





EXECUTIVE SUMMARY

Despite prevailing economic pressures, including inflation and geopolitical instability, the travel and tourism industry is ripe with opportunities. Technological advancements, such as AI-driven personalization and mobile platforms, are revolutionizing how travel is planned and experienced.

A renewed emphasis on sustainability, strategic infrastructure investments, and a commitment to innovation are vital for the industry's continued evolution and its ability to meet the dynamic expectations of consumers.

This report delivers a comprehensive analysis of the current state of travel and tourism, providing essential insights into prevailing trends, imminent challenges, and future opportunities. It outlines actionable strategies designed to enable industry stakeholders to effectively adapt to market dynamics and cultivate growth within a highly competitive global environment.





TRAVEL + TOURISM 2025

Market Overview





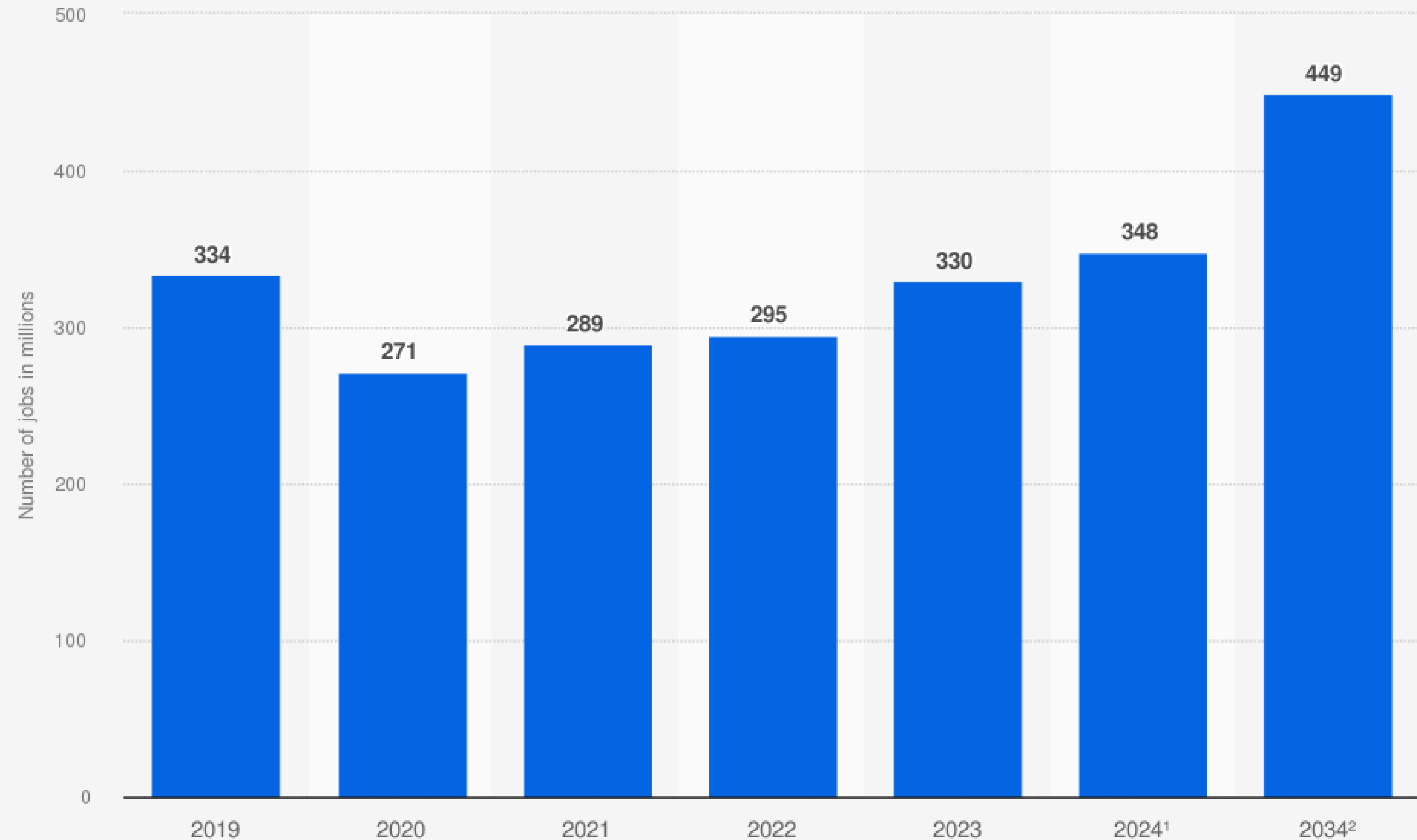
MARKET OVERVIEW

TOURISM IS A MAJOR GLOBAL EMPLOYER

The data shows that more and more people are joining the travel and tourism industry from 2019 to 2023, with forecasts going up to 2034. This expected growth means more job openings, indicating a strong rebound and growth.

This advancement not only boosts economic progress but also opens up numerous opportunities for people around the globe.

Number of travel and tourism jobs worldwide from 2019 to 2023, with a forecast for 2024 and 2034 (in millions)

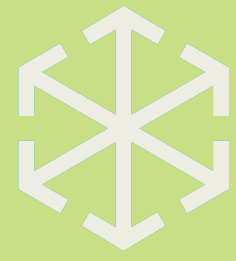


Sources
WTTTC; Oxford Economics
© Statista 2024

Additional Information:
Worldwide; WTTTC; Oxford Economics; 2019 to 2023



Approximately 1 in every 20 jobs in the United States is directly or indirectly dependent on the travel and tourism sector.



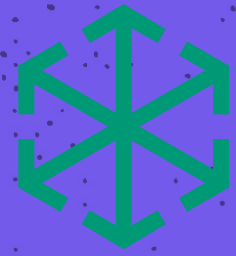
MARKET OVERVIEW

THE GLOBAL TRAVEL REVIVAL



The global tourism industry is bouncing back with great momentum. People are eager to travel again, thanks to pent-up excitement, increased spending money, and changing preferences.

This highlights a move toward more special, eco-friendly, and tech-savvy adventures. As restrictions loosened, fresh chances popped up, boosting the economy and reshaping how people discover the world on a daily basis.



By 2026, overall travel and tourism revenues worldwide could approach one trillion U.S. dollars. The United States, China, and Europe remain central drivers of worldwide tourism expenditures.

KEY INDICATORS:

Within the Travel & Tourism industry, the Hotels market is the largest segment. Forecasts suggested that in 2024, it reached a total market volume of \$426.50 billion.

The projected growth of the hotels market user base is expected to reach 1.81 billion by the year 2029, indicating a significant expansion in the industry's reach and potential customer base.

It is projected that the share of revenue generated through online sales in the Travel & Tourism sector will reach 75% by the year 2029, indicating a significant shift towards digital platforms.





TRAVEL + TOURISM 2025

Lodging + Key Segments



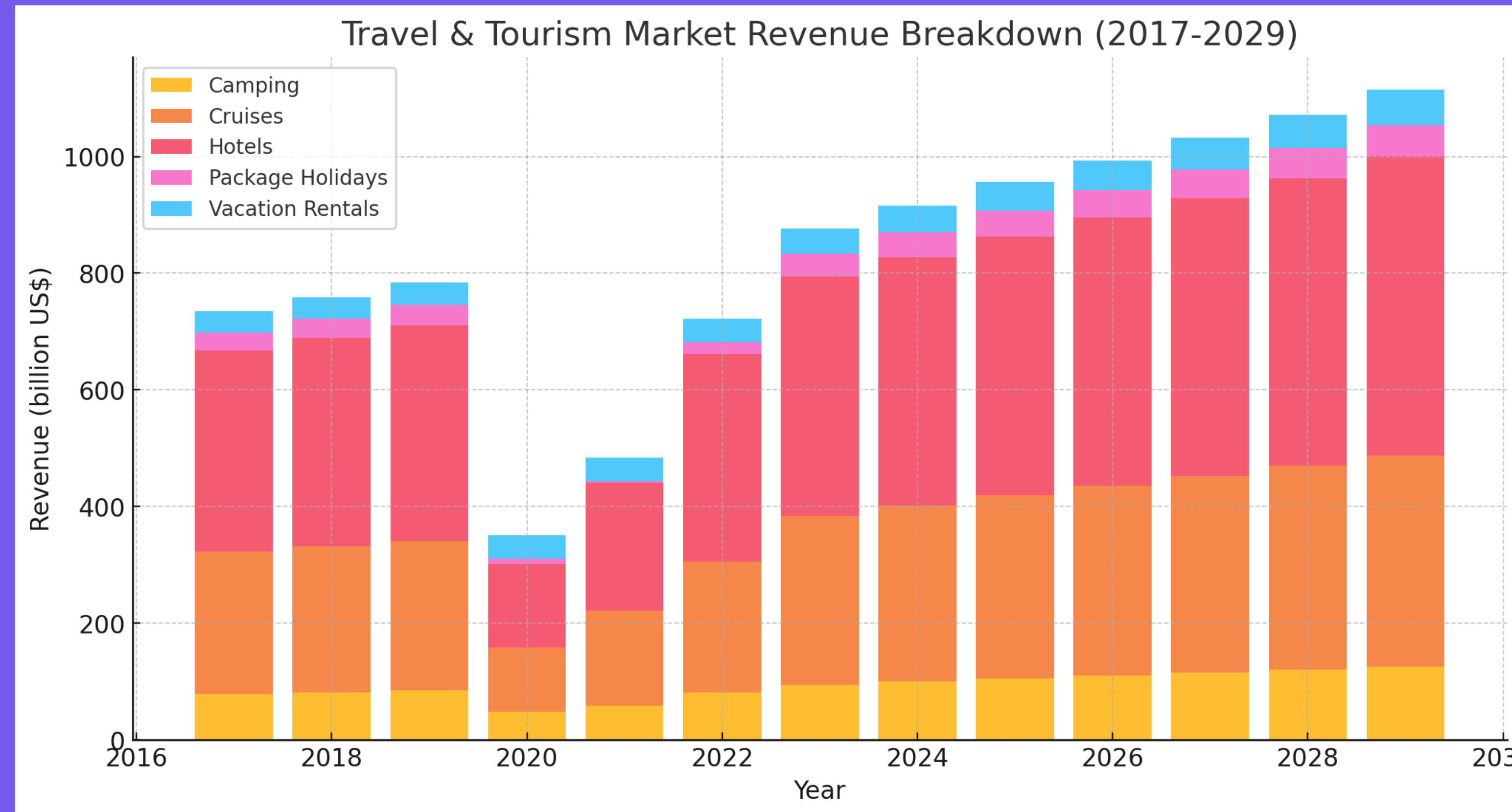


HOTELS LEAD ACCOMMODATIONS

Hotels play a huge role in the travel industry, with revenue expected to reach around 443 billion U.S. dollars by 2025. Travelers look for ease, rewards, and top-notch experiences, often making their reservations online.

Factors like environmental impact and social responsibility impact guests' choices. As bookings start to stabilize after the pandemic, the industry foresees continuous growth due to changing preferences of customers worldwide.

LODGING + KEY SEGMENTS

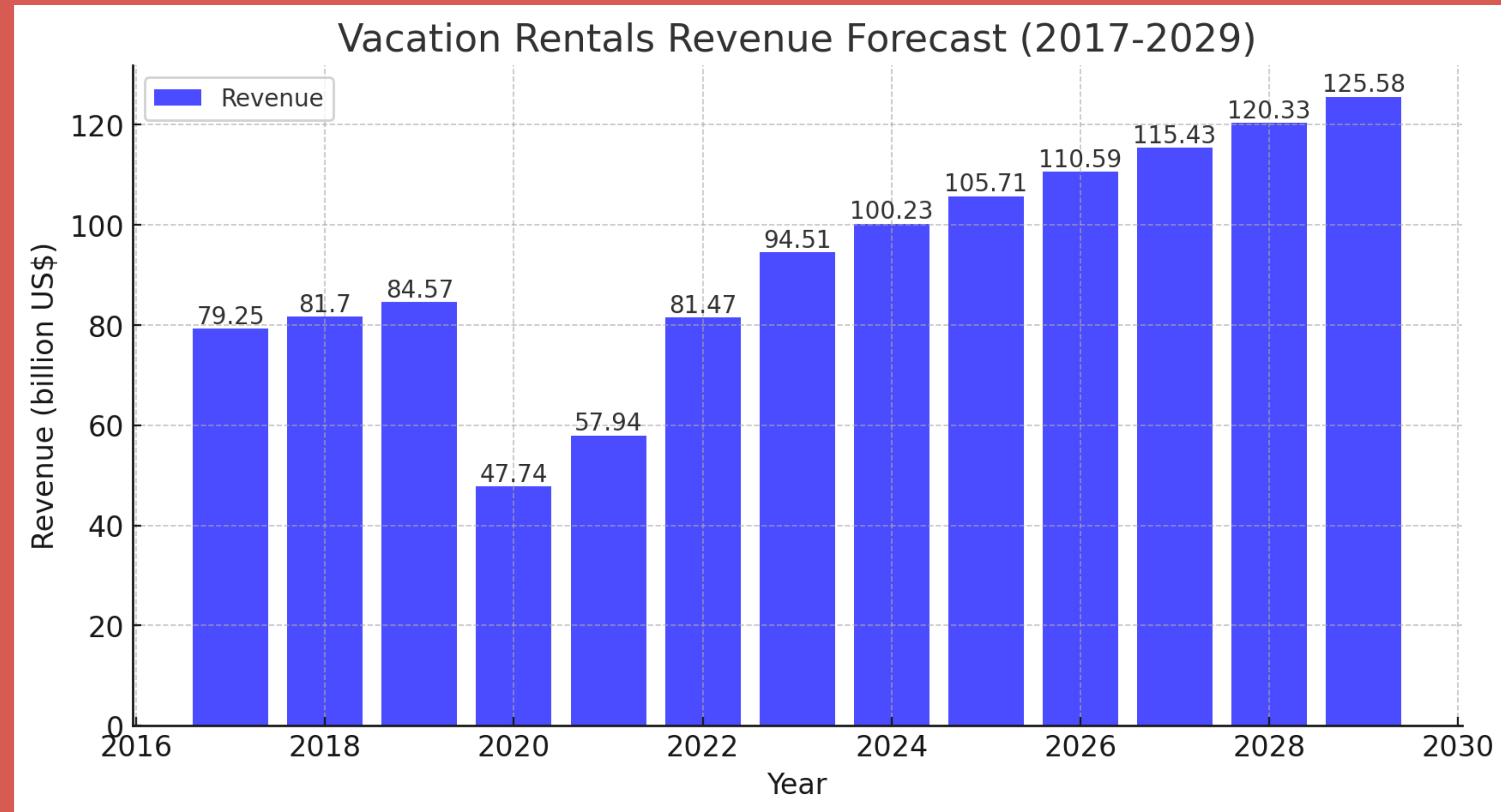


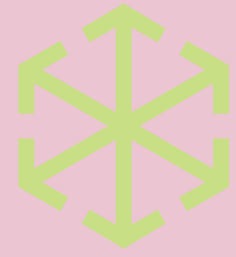


THE POPULARITY OF VACATION RENTALS IS RISING.

Vacation rentals, which include private homes and short-term bookings, are part of a rapidly expanding niche. Their revenue is projected to exceed 110 billion U.S. dollars by 2026, reflecting the growing demand from travelers seeking authenticity, space, and flexibility.

Platforms like Airbnb and Vrbo are leading the way in this sector, with rural tourism and the rise of “workation” trends contributing to the increasing popularity of rental stays.



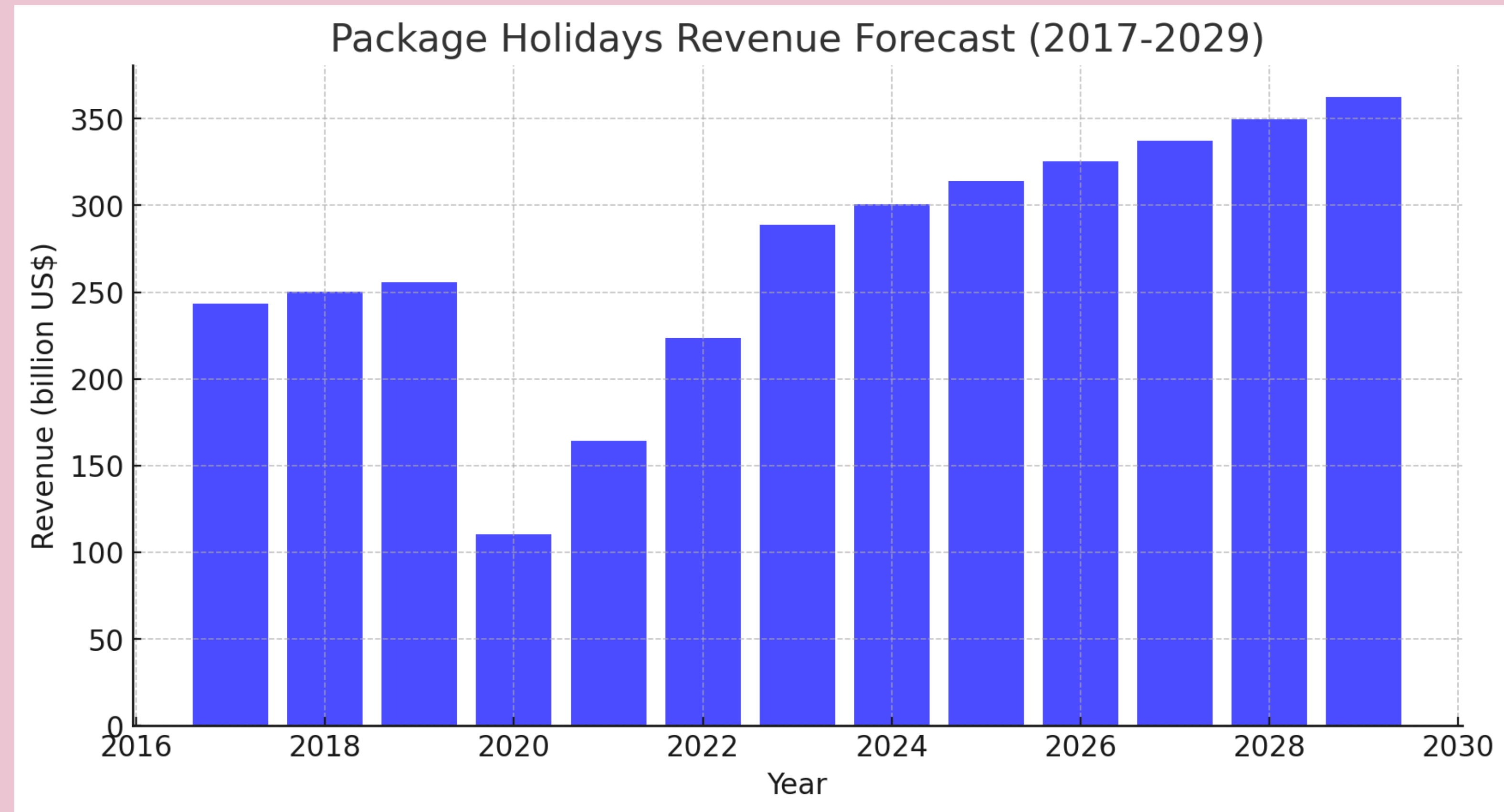


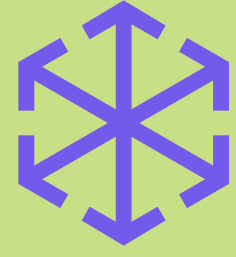
PACKAGE HOLIDAYS ARE REBOUNDED, TOO

Package holidays are designed to combine transportation and lodging into a single price, appealing to consumers who value convenience.

It is projected that revenues could grow to 325 billion U.S. dollars by 2026, covering both domestic and international travel. As economies become more stable, there is a growing preference among families and groups for pre-planned travel schedules and clear cost breakdowns.

The shift towards online sales channels has outpaced traditional offline bookings, reflecting the evolving preferences of modern consumers.

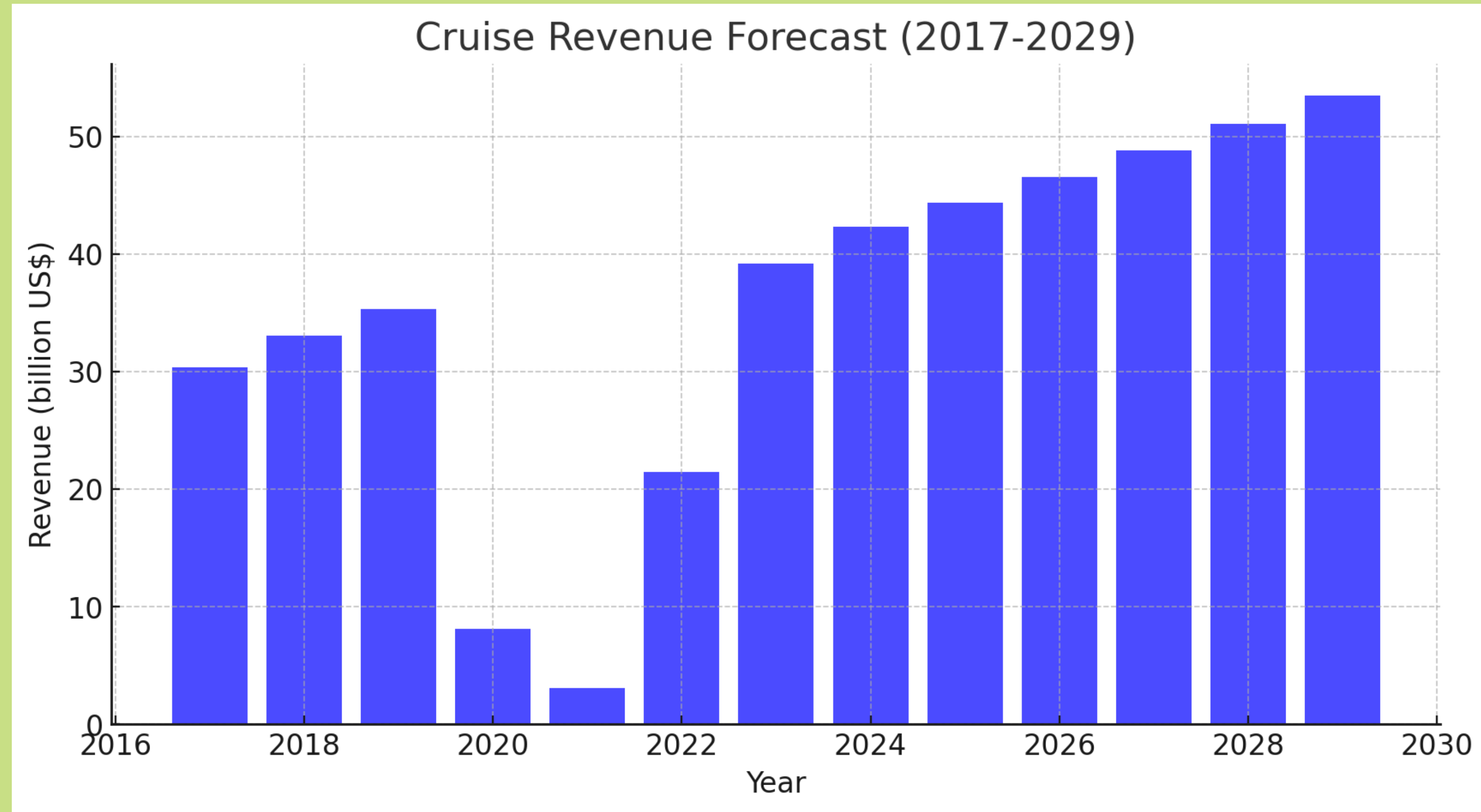




CRUISES ARE ON THE MOVE

Cruises, including ocean and river voyages, recovered post-pandemic amid rising demand for all-inclusive experiences. Global cruise market revenue may exceed 42 billion U.S. dollars by 2024.

Onboard amenities, themed itineraries, and eco-friendly initiatives attract diverse demographics. Despite occasional volatility, cruising's dedicated clientele drives steady growth in leisure travel expenditures.





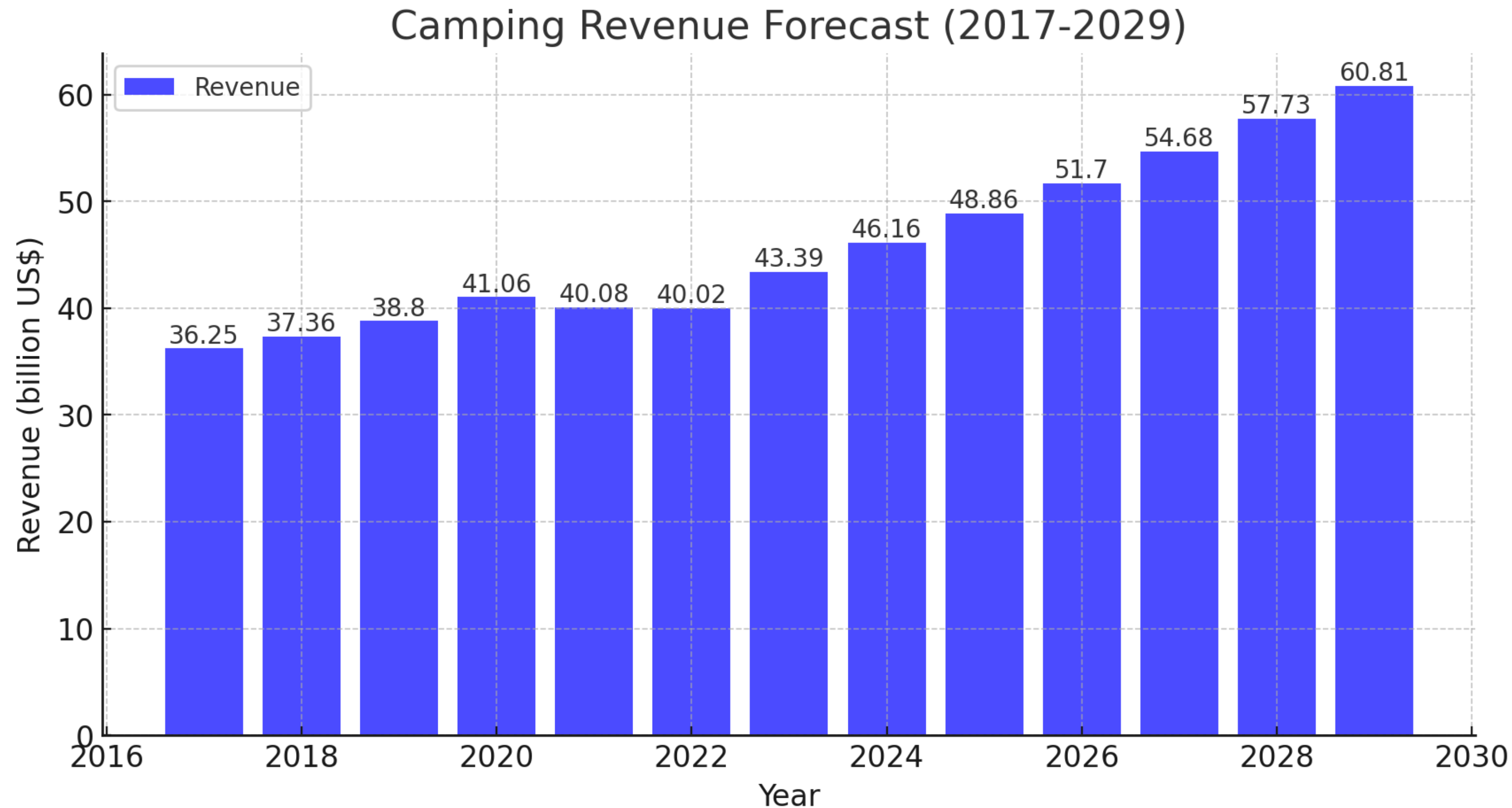
CAMPING REVENUE IS INCREASING

Camping draws nature-seeking travelers seeking open-air experiences. This niche, valued at more than 48 billion U.S. dollars in 2025, benefits from heightened interest in outdoor recreation.

Domestic tourists fuel significant demand, as campsite bookings shift online. Improved amenities and eco-conscious travelers ensure strong, ongoing growth in this affordable leisure submarket.

Interestingly, camping was one of the only accommodation segments that experienced growth in 2020, and a decline in the following years, through 2023.

LODGING + KEY SEGMENTS





TRAVEL + TOURISM 2025

The U.S. Travel Industry



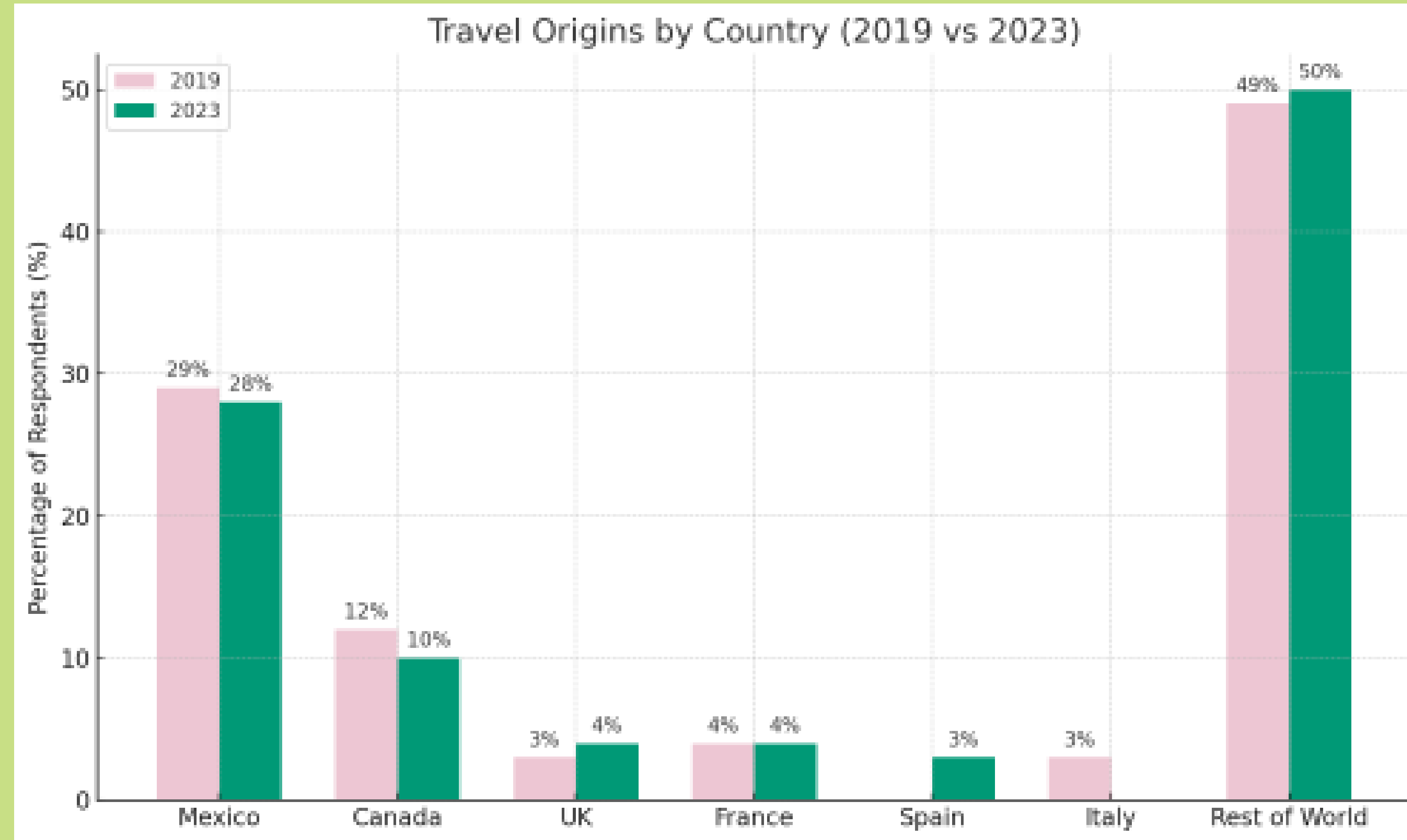


WHERE TRAVELERS COME FROM

Travel origin market trends into the U.S. from 2019 to 2023 show consistency. Mexico and Canada are key from North America, with minor changes.

UK and Spain maintained or gained, while Italy disappeared in 2023. 'Rest of the World' grew, now half of total origins.

This hints at diversifying sources, with emerging markets gaining importance. Global reach needs global readiness.

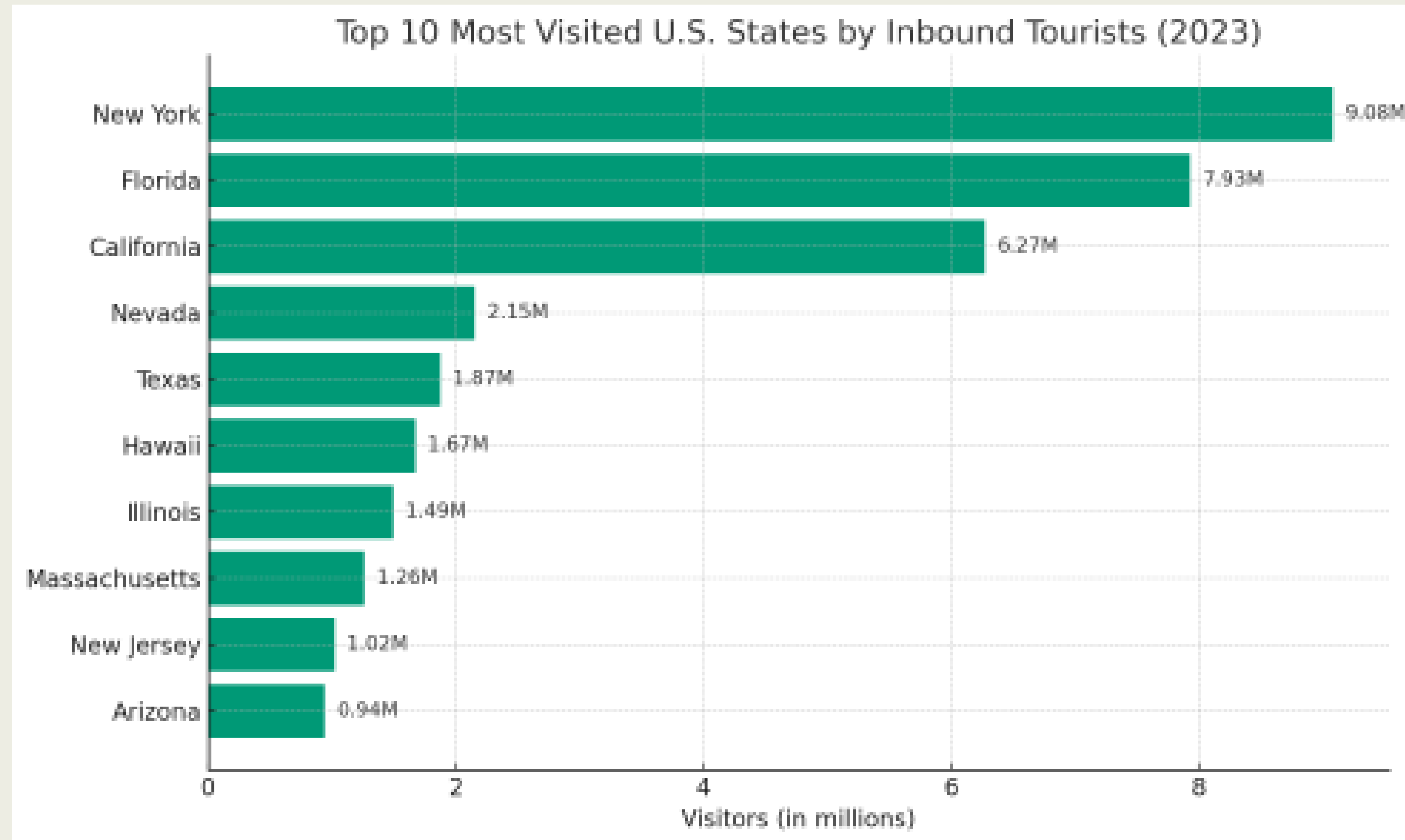




WHERE THOSE TRAVELERS GO

New York, Florida, and California are in a league of their own—pulling in more than 23 million international visitors combined in 2023. These states aren't just tourism hubs; they're global magnets.

But after the top three, the dropoff is steep. States like Nevada, Texas, and Hawaii round out the list but at significantly lower volumes.



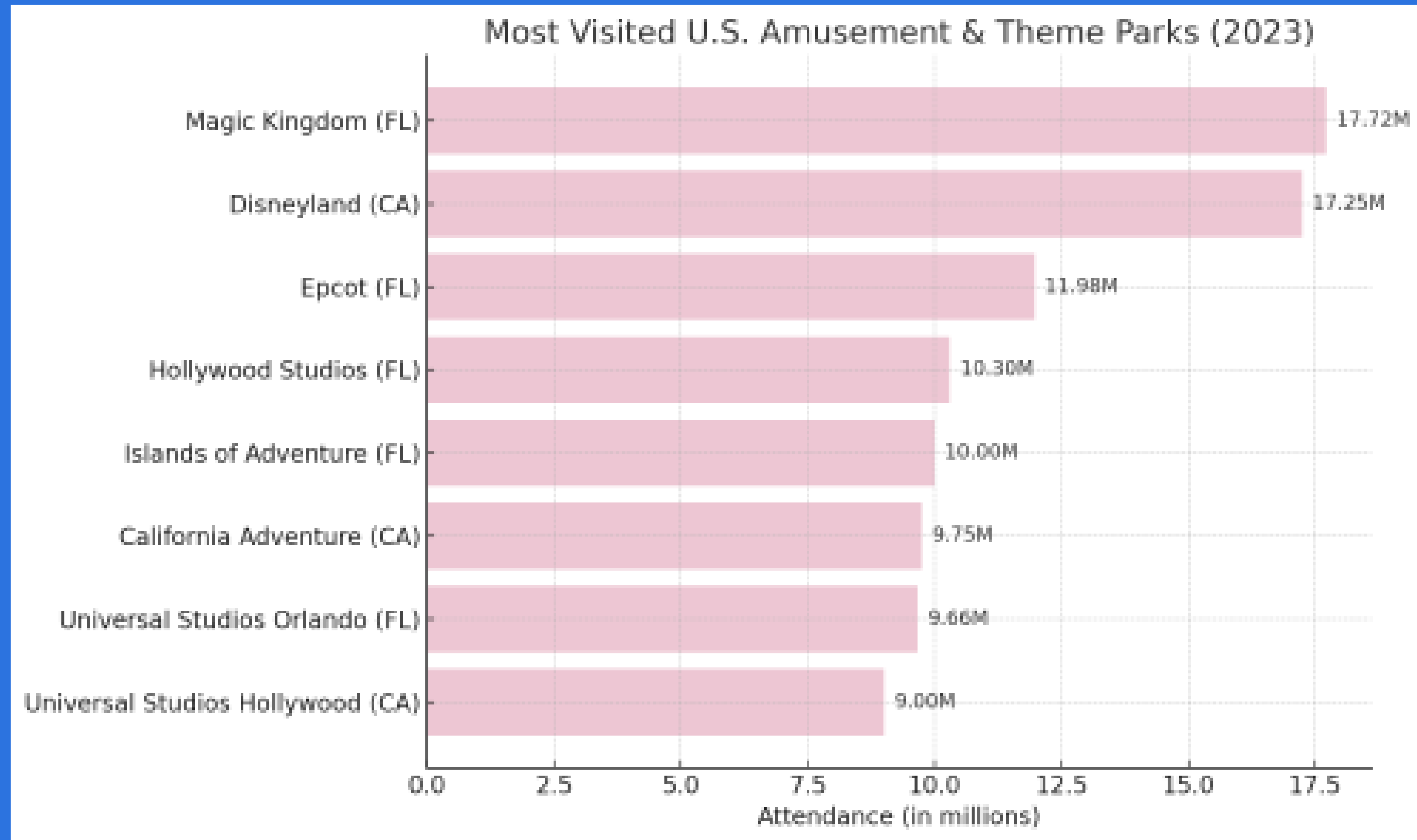


IN-DEMAND ATTRACTIONS

The theme park industry in the U.S. is primarily dominated by two states: Florida and California. Walt Disney World and Universal's properties in Florida lead the way with over 60 million combined visits. Following closely are California's Disneyland and California Adventure, showcasing the continued strength of the West Coast.

These parks, with their global intellectual property, appeal to multiple generations, and year-round accessibility, consistently attract both local and international visitors.

THE U.S. TRAVEL INDUSTRY

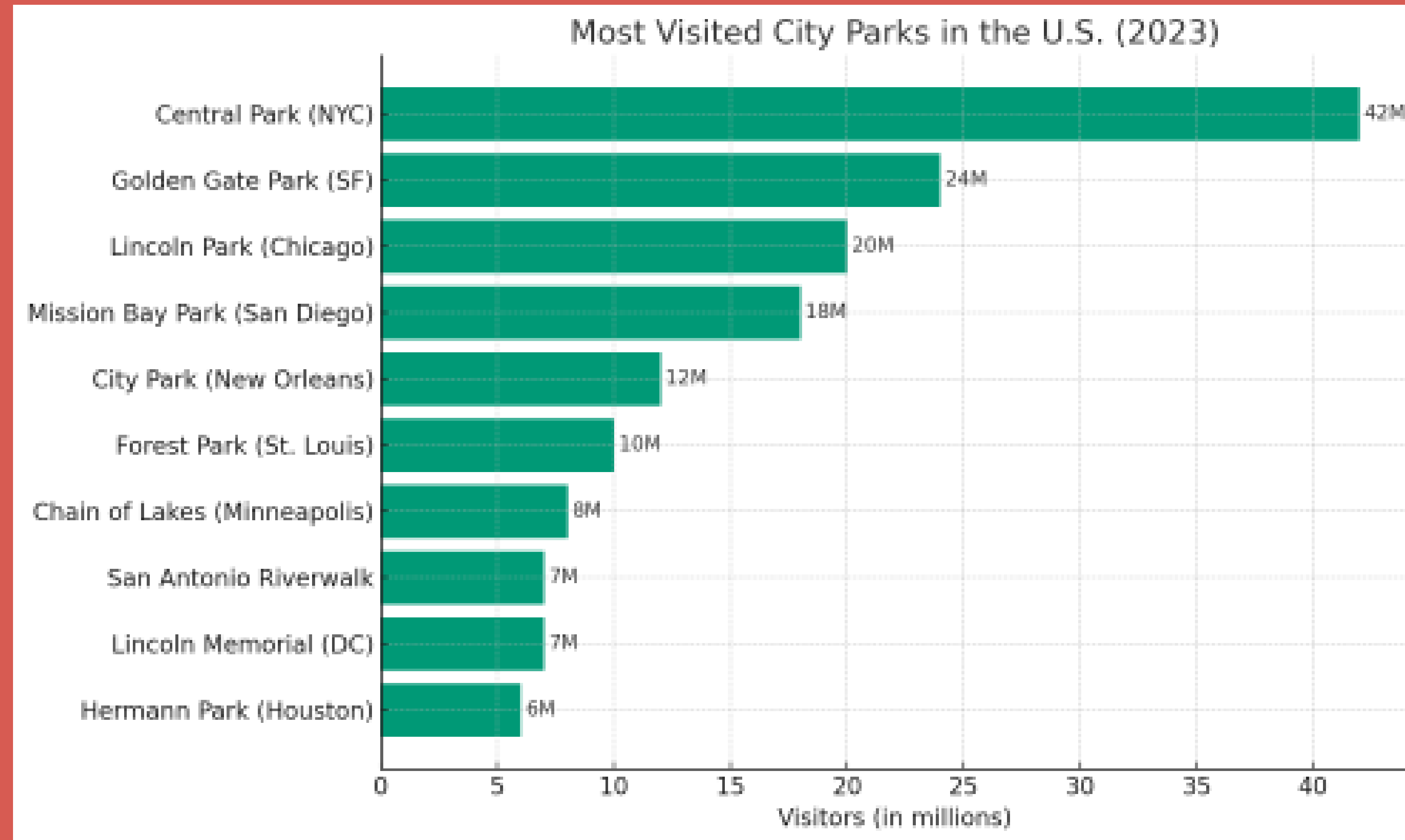


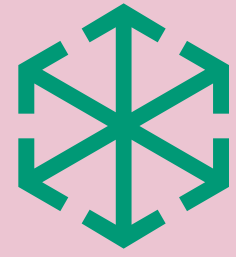


CITY PARKS BY THE MILLIONS

City parks are more than green spaces; they serve as vital economic and cultural hubs. Central Park stands out nationally with 42 million visits, almost double that of its closest rival, Golden Gate Park. Chicago, San Diego, and New Orleans also rank high, demonstrating the broad appeal of urban recreation across different locations and climates.

These parks attract both locals and tourists, providing returns on investment in terms of well-being, tourism, and property values.



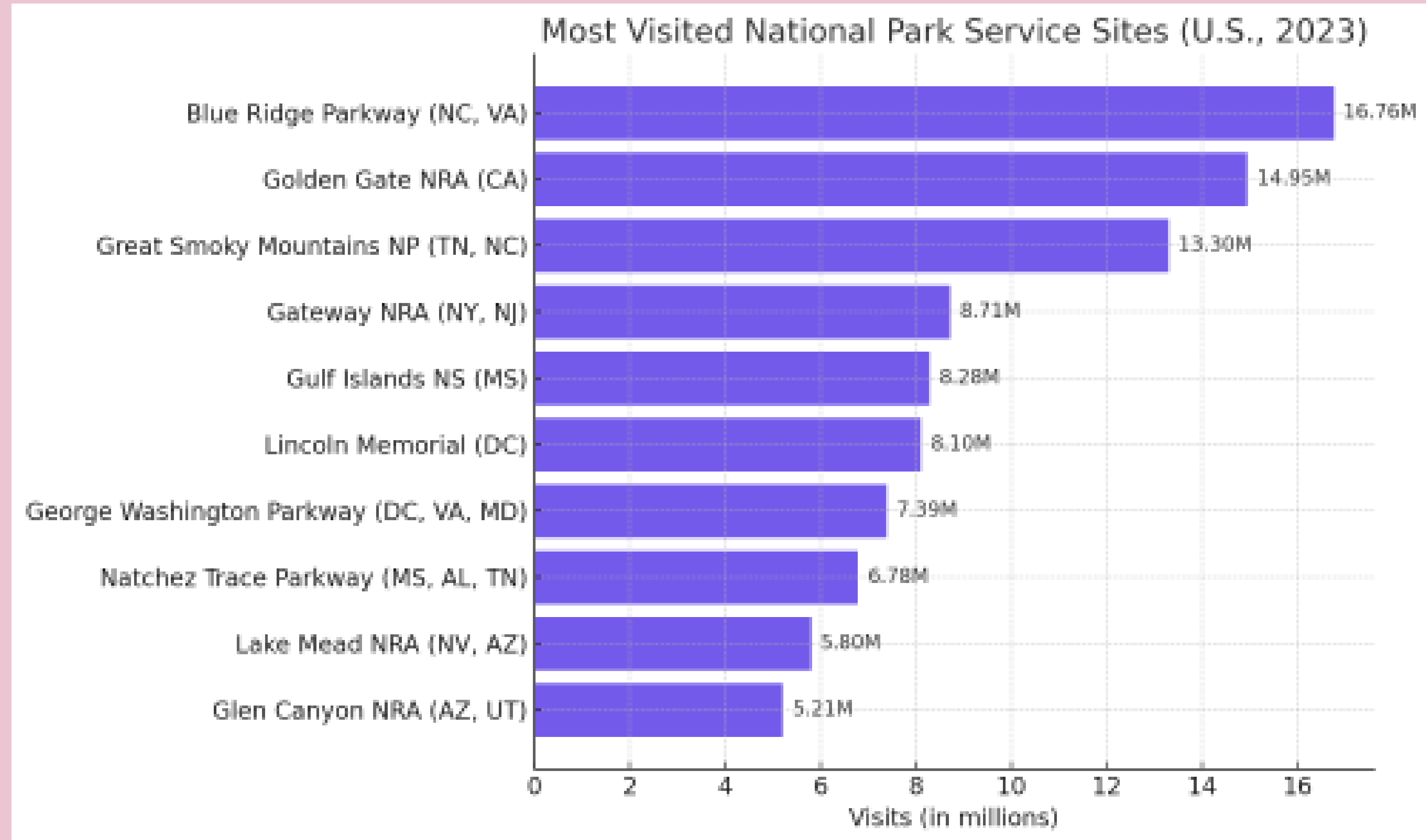


NATURE MEETS MASS APPEAL

The Blue Ridge Parkway, with nearly 17 million visits, stands out not just as a scenic drive but as a powerhouse in tourism. Alongside the iconic Golden Gate and Great Smoky Mountains, destinations like Gateway NRA and Lincoln Memorial showcase how urban locations attract visitors.

This compilation harmonizes natural beauty with recreational accessibility, positioning national parks as pivotal contributors to rural economies and urban tourism industries.

THE U.S. TRAVEL INDUSTRY





BUSINESS TRAVEL IS REBOUNDED... SLOWLY

Business travel is regaining ground—but at a measured pace. Domestic spend continues to drive the category, comprising nearly 89% of all business travel by 2025. International recovery is slower, inching from \$30.7B in 2023 to \$38.6B by 2028.

Even with steady growth, total business travel won't surpass 2019's \$365.7B peak until after 2028.

The rebound is real, but it's cautious—and there's still ground to cover.





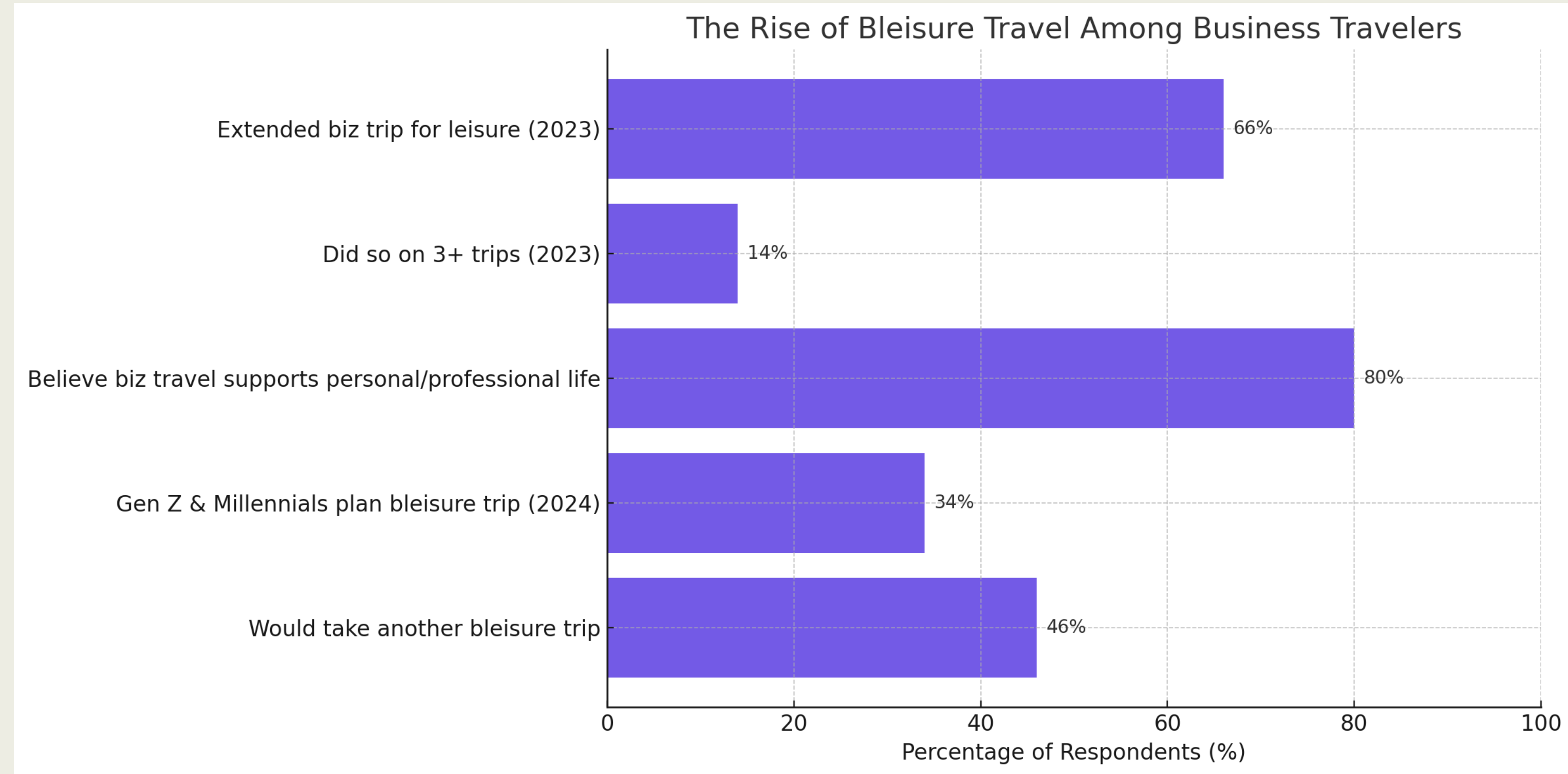
THE U.S. TRAVEL INDUSTRY

THE STEADY RISE OF BLEISURE

In 2023, 66% of corporate travelers extended a business trip for leisure, and 14% did it three or more times.

This isn't isolated to digital nomads; employees across sectors are blending work and play. Gen Z and Millennials are leading the charge, with 34% planning future bleisure extensions.

Meanwhile, 80% of all business travelers say more travel supports both their personal and professional lives





TRAVEL + TOURISM 2025

Sales Channels + Average Revenue



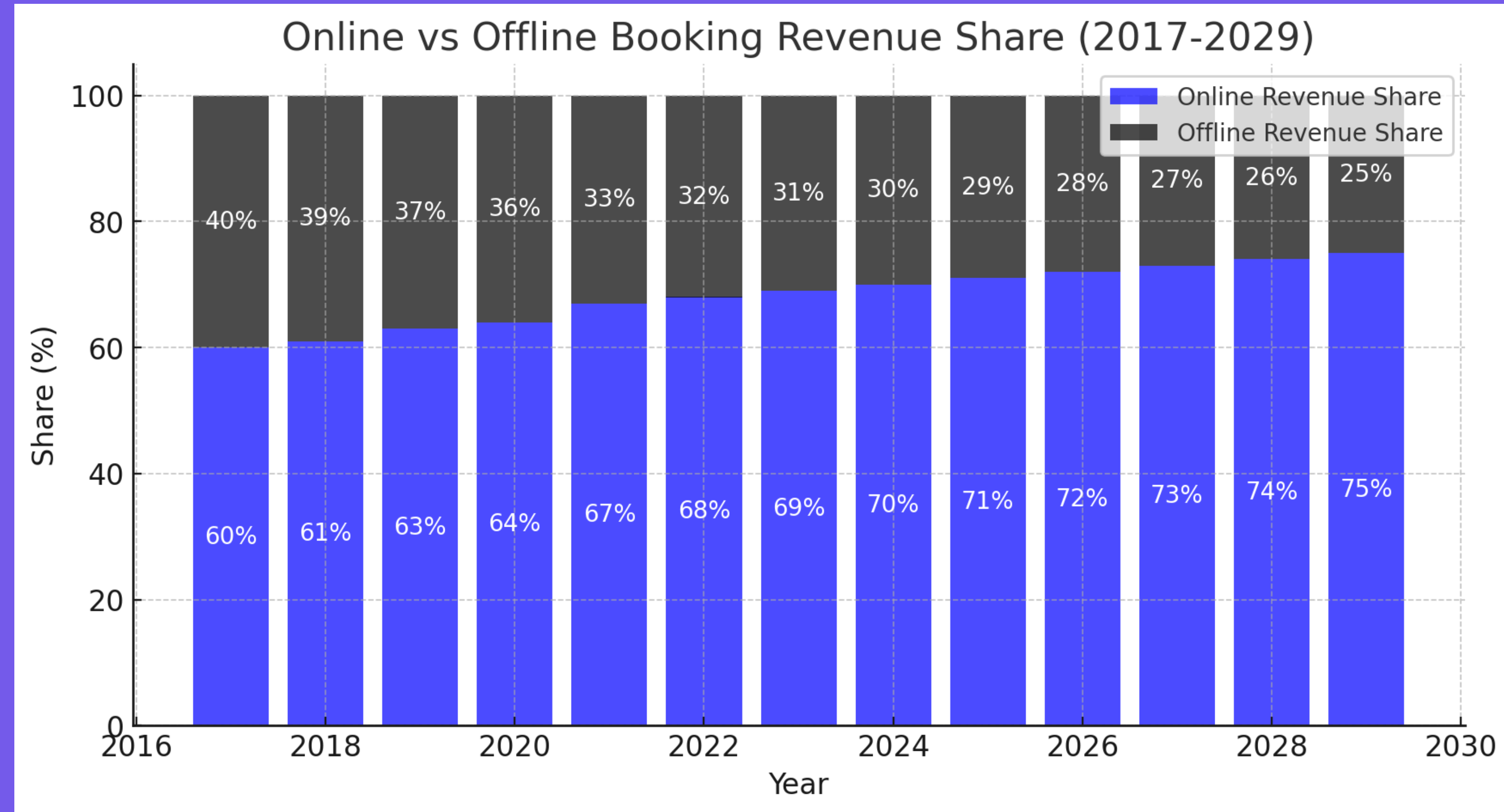


GLOBAL SALES CHANNELS

Online bookings represent over two-thirds of total travel revenue globally and are rising steadily. Mobile platforms facilitate price comparisons, instant reservations, and reviews.

Offline channels remain significant but declining, as consumers prefer digital convenience. Providers focus on user-friendly websites, loyalty apps, and search optimization to capture a broader clientele.

SALES CHANNELS + AVERAGE REVENUE



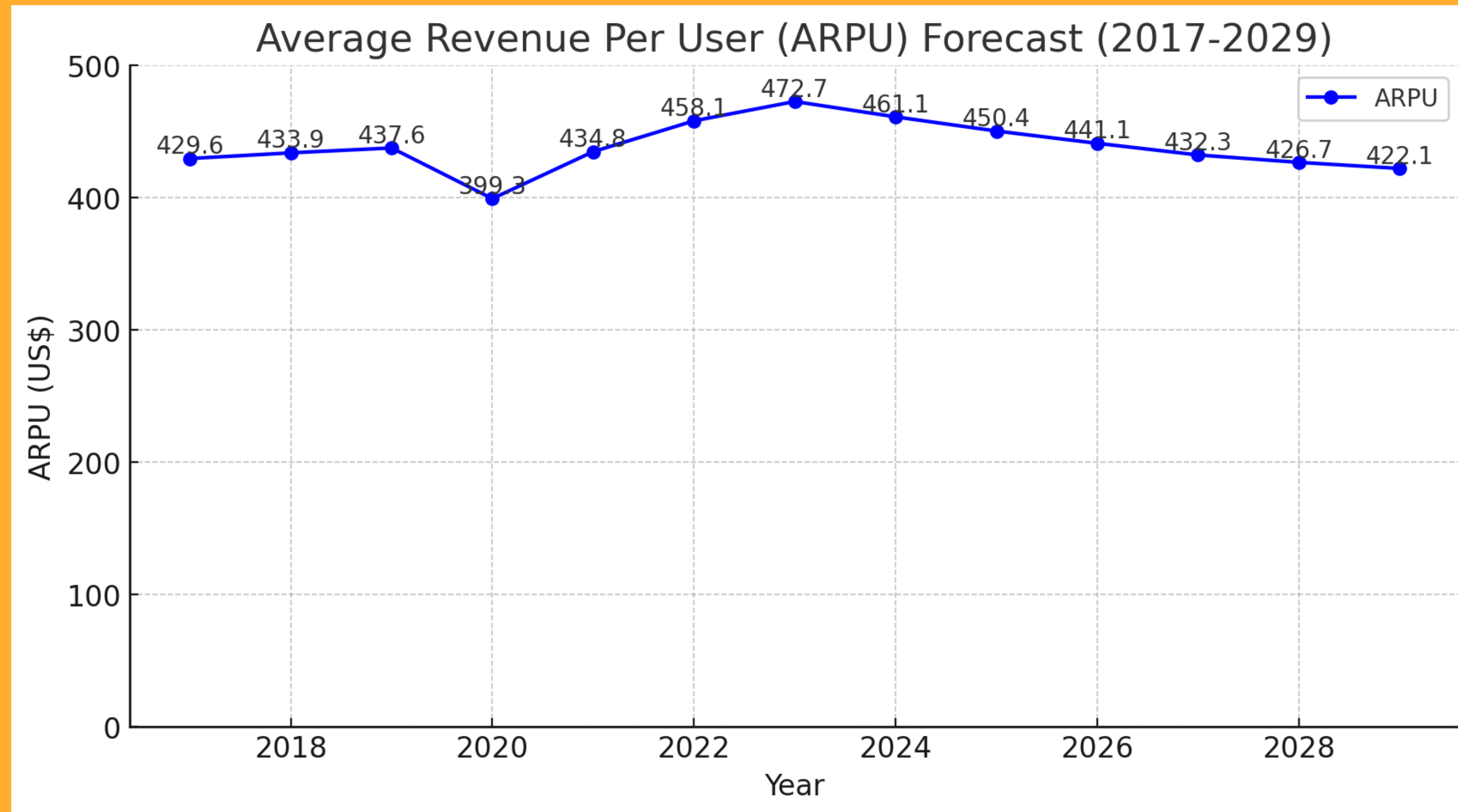


AVERAGE REVENUE PER USER (ARPU) IS FLUID— BUT STABILIZING

ARPU trends highlight travelers' willingness to spend on lodging, transportation, and experiences. Shifts toward premium rooms or upgraded itineraries push ARPU upward, though budget-friendly alternatives persist.

After massive post-pandemic spikes, by 2026 the average spend per traveler is set to stabilize closer to pre-pandemic levels, reflecting rising living costs, competitive pricing, and segmented consumer preferences across travel categories.

SALES CHANNELS + AVERAGE REVENUE



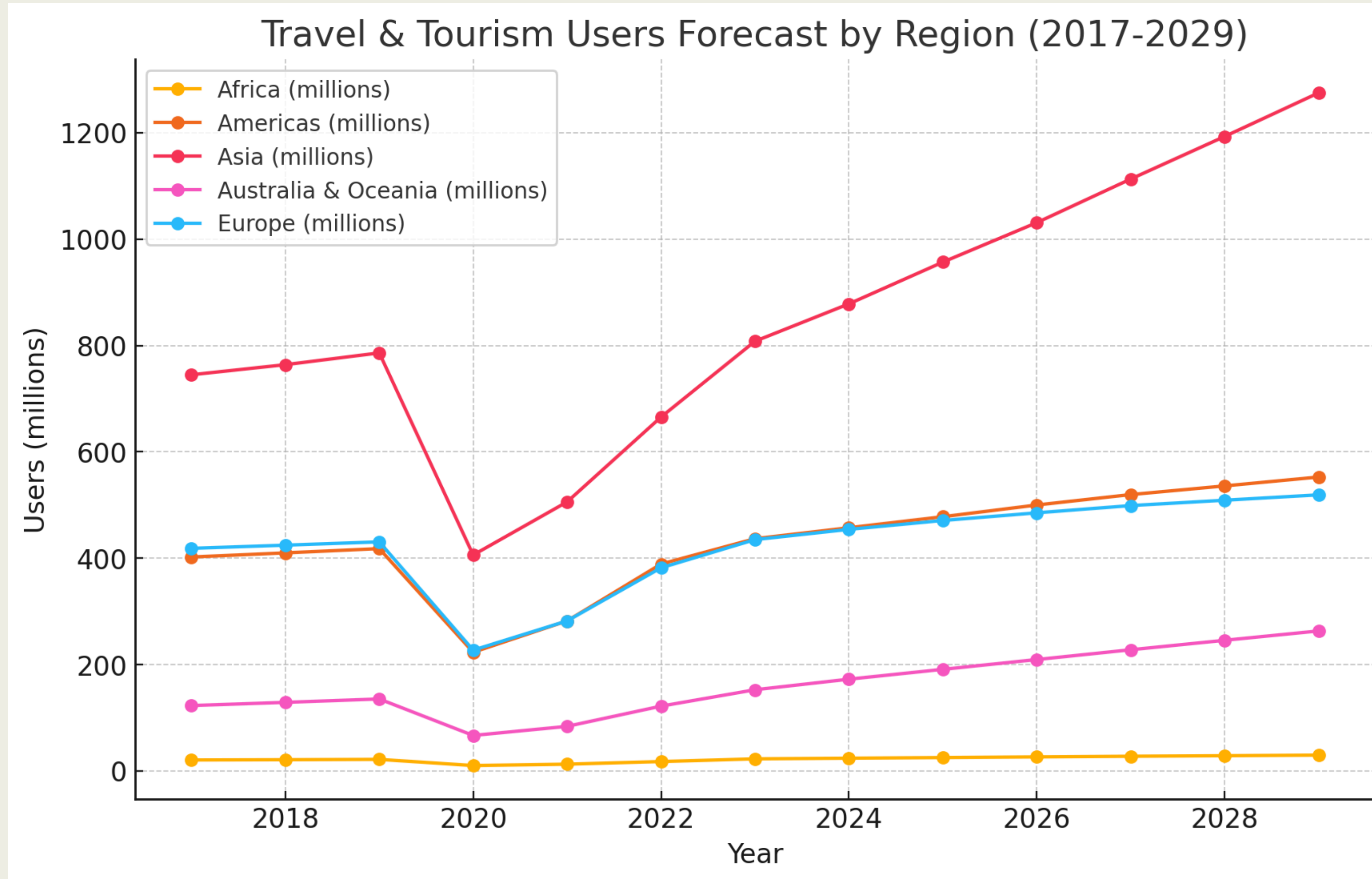


ASIA DOMINATES NUMBER OF USERS

Asia has the largest number of tourists worldwide, thanks to the large populations and growing middle classes in China and India. Travel within the region has increased significantly due to easier visa policies and the rise of budget airlines.

While Europe and the Americas currently lead in revenue generation, Asia's economic growth is reshaping the global tourism market.

SALES CHANNELS + AVERAGE REVENUE



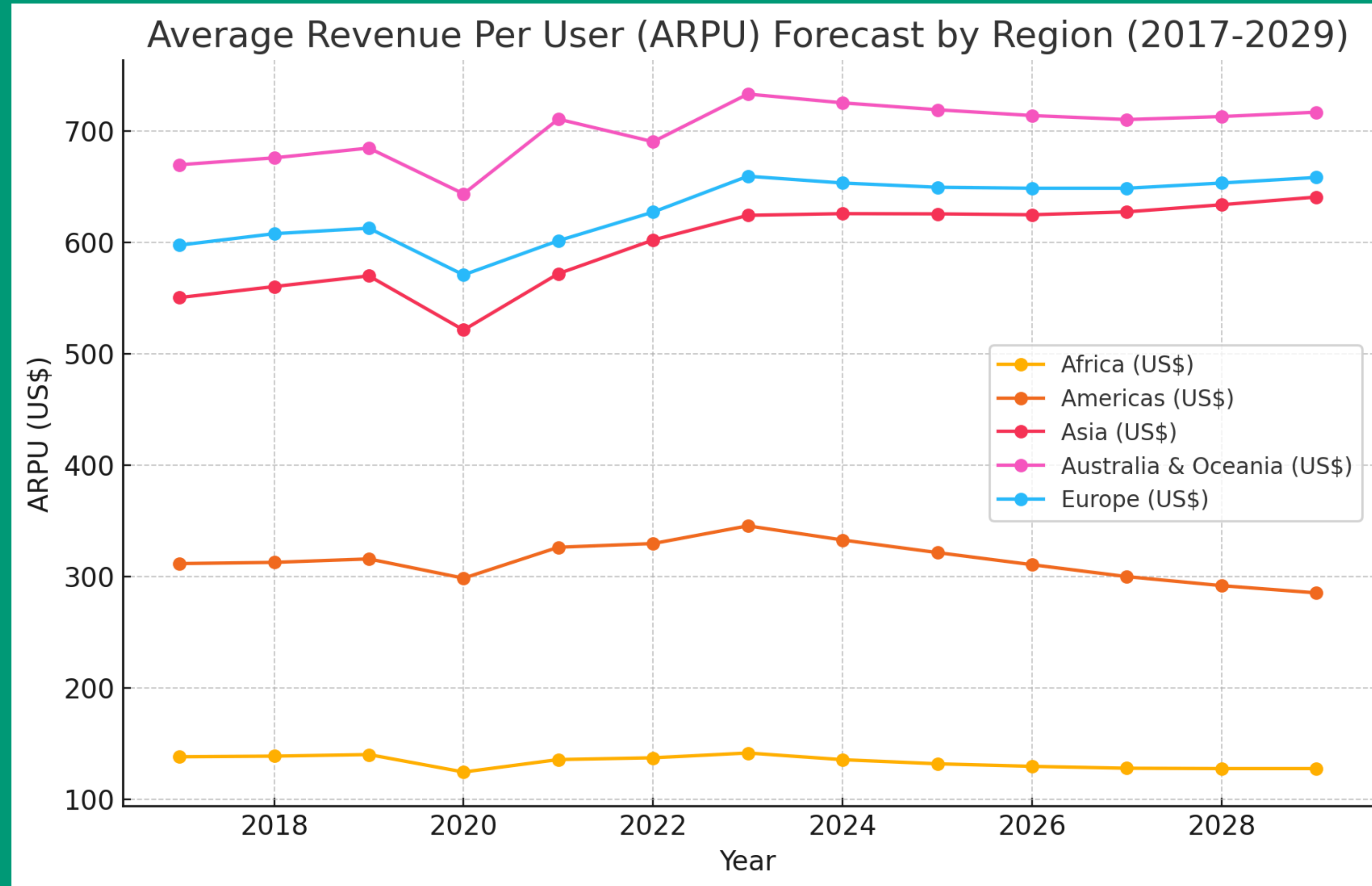


AVERAGE REVENUE PER USER (ARPU) ACROSS REGIONS

Australia & Oceania usually has the highest ARPU because people travel long distances, there's limited supply, and lodging and experiences are more expensive.

On the other hand, Europe's ARPU stays high due to its rich cultural and historical sites. In contrast, Africa and some parts of Asia have lower ARPU, but both regions are experiencing rapid growth thanks to an increase in domestic tourists.

SALES CHANNELS + AVERAGE REVENUE

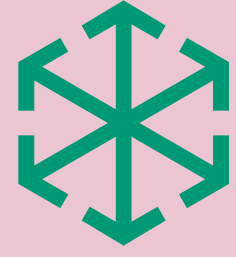




TRAVEL + TOURISM 2025

Traveler Behavior

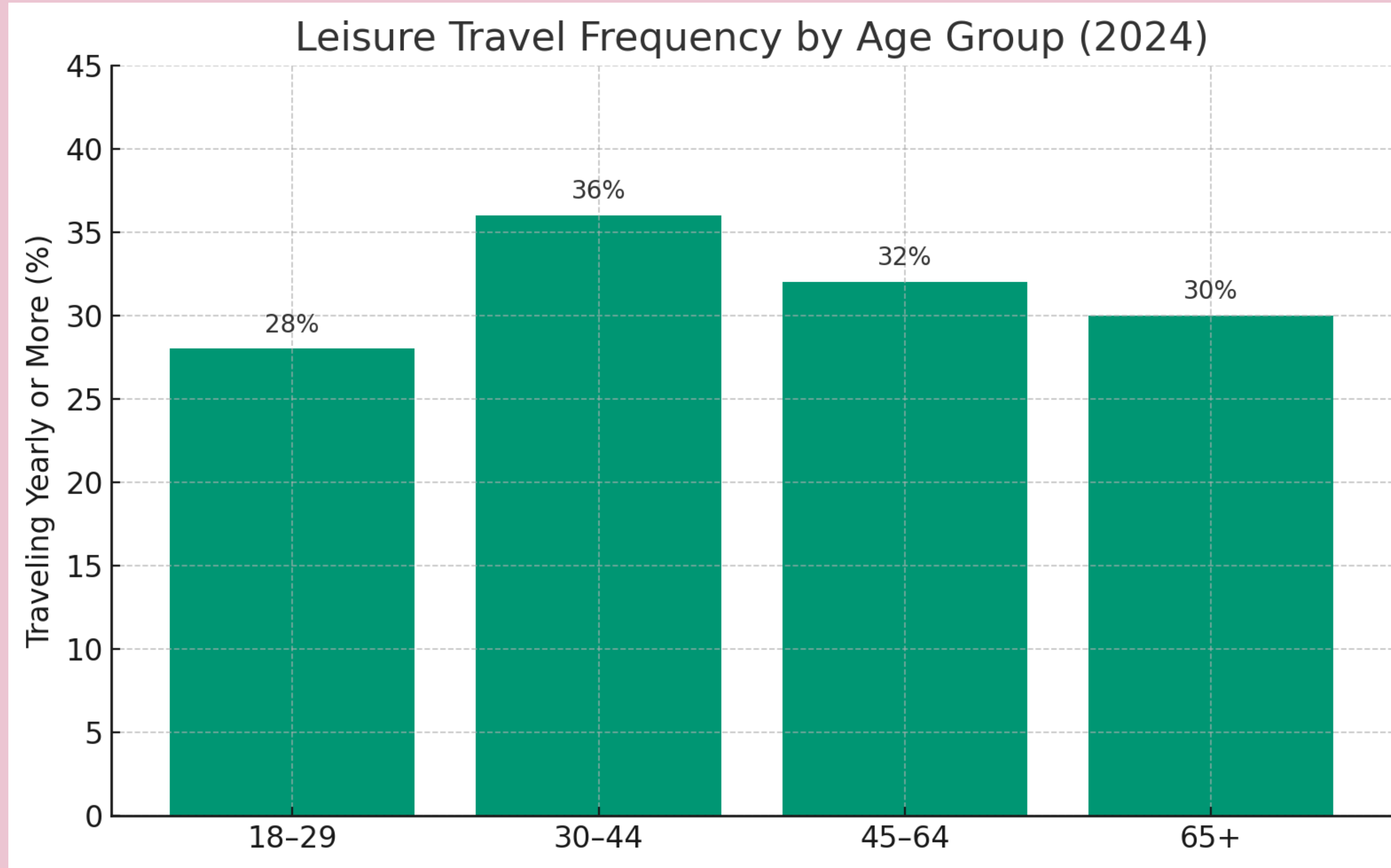




TRAVEL FREQUENCY PEAKS HIGH IN MILLENNIALS AND OLDER GEN Z

Adults aged 30–44 are the top leisure travelers, with 36% taking at least one trip yearly. This group, mainly Millennials and older Gen Z, values experiences due to career stability and disposable income.

While other age groups are interested, the 30–44 range drove leisure travel demand in 2024.





TRAVELER BEHAVIOR

HIGH INTENT TO TRAVEL

According to a recent survey conducted by IPX, 92% of the participants expressed an intention to engage in leisure travel activities in 2025.

This marks a significant increase compared to the previous year. Among the respondents, 56% are looking to increase their travel frequency, 30% are planning to maintain their current travel habits, while 14% are considering reducing their travel commitments for the upcoming year.



92%

PLAN TO TRAVEL
IN 2025



TRAVEL BUDGETS ARE TAKING PRIORITY

As travelers plan their 2025 finances, travel is ranking high in their discretionary spending, highlighting an unwillingness to go without new experiences—often at the expense of other budget categories.

60%

Prioritize travel when planning personal finances.

79%

are budgeting for travel in 2025.

63%

of Americans are planning to use points or rewards to pay for travel.

ADDITIONAL FINDINGS:

- Not only are people reporting enhanced intent to travel in 2025, the amount they're earmarking for travel is exploding.
- The average 2025 travel budget for American travelers has skyrocketed **from \$5,300 in 2024 to more than \$10,000 in 2025.**

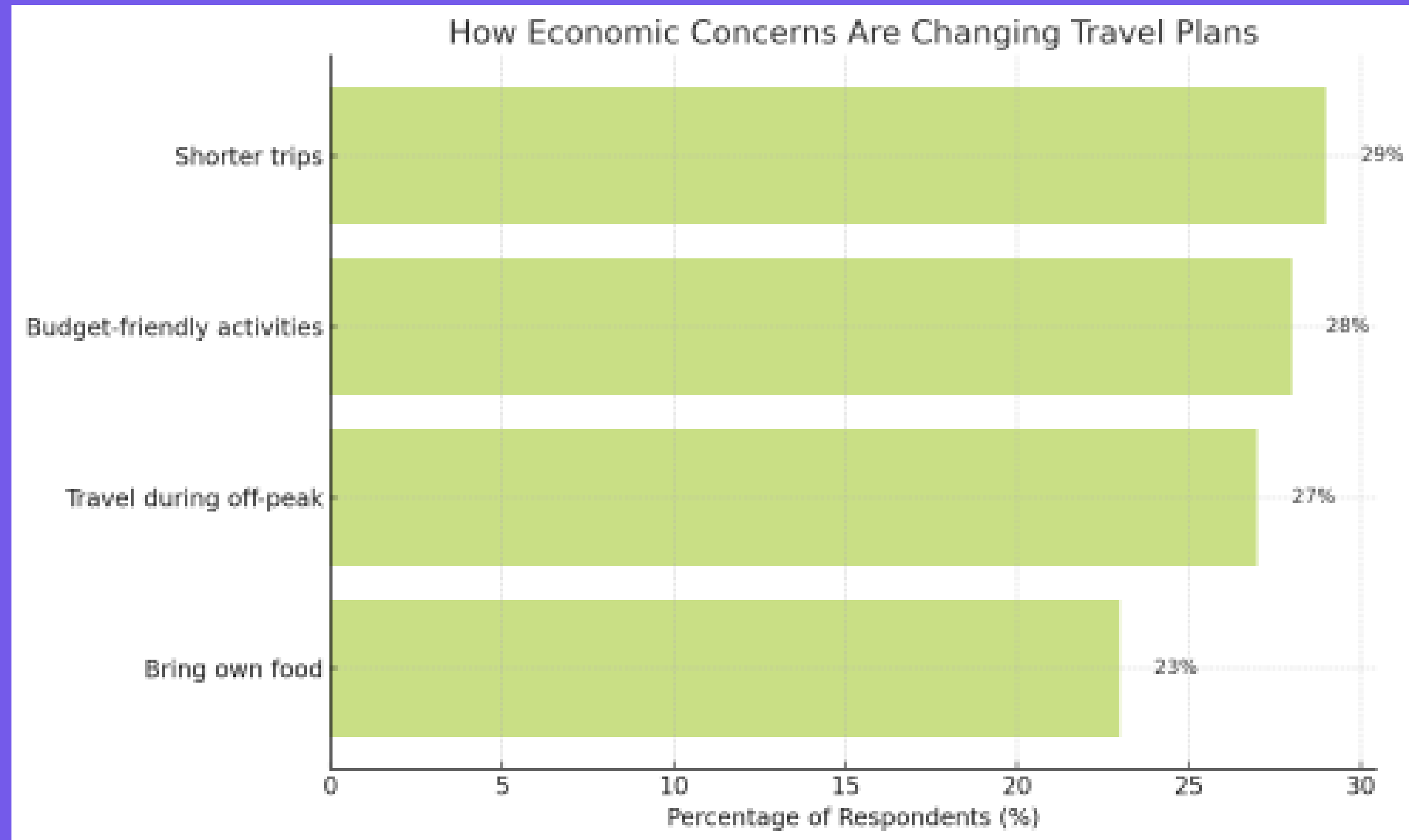


TRAVELER BEHAVIOR

ECONOMIC OUTLOOK INFLUENCING PLANS

But it isn't all rosy projections for travelers. Economic perceptions are seriously impacting travel behaviors for some. **While 41% of respondents anticipate economic improvement, 33% expect a downturn.**

Those expecting economic challenges are more likely to adjust their travel plans by opting for shorter trips (29%), seeking budget-friendly activities (28%), traveling during off-peak times (27%), and saving on food costs by bringing their own meals (23%).



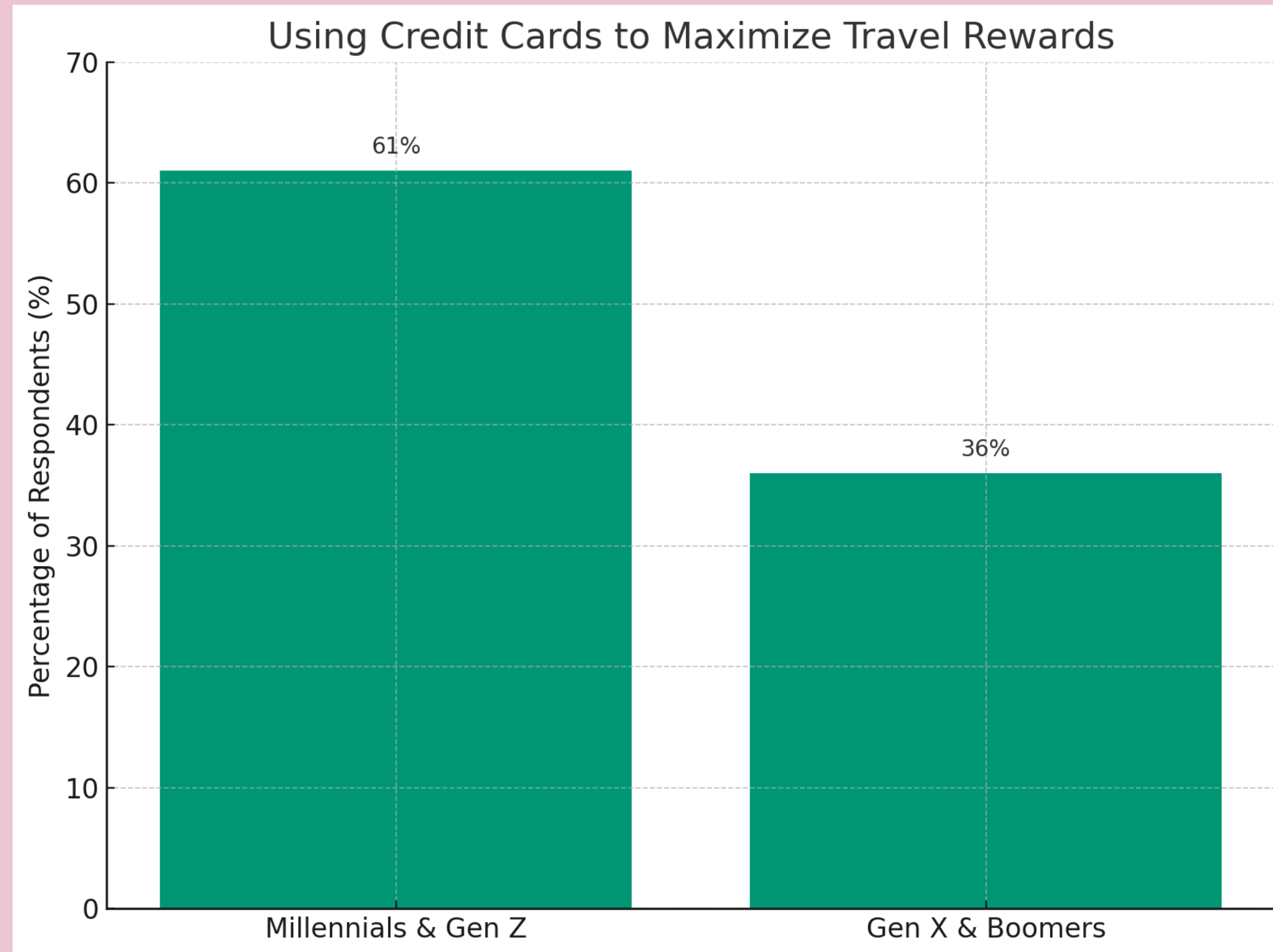


YOUNGER TRAVELERS ARE PLAYING THE REWARDS GAME SMARTER

Millennials and Gen Z aren't leaving money on the table—61% use their credit cards strategically to rack up travel rewards, compared to just 36% of older generations.

This group treats travel like an investment and knows how to squeeze value out of every transaction.

TRAVELER BEHAVIOR





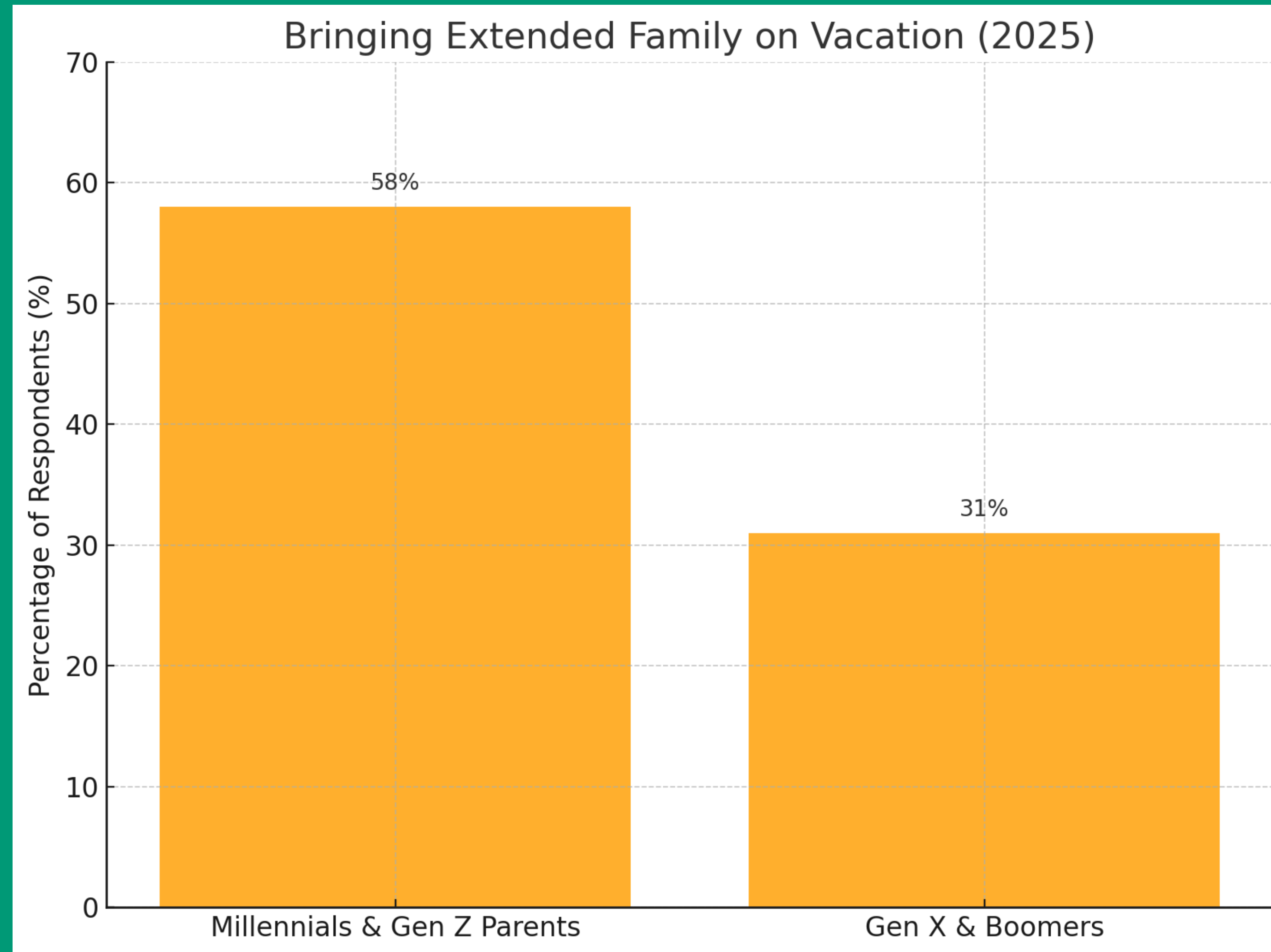
In 2025, Americans will take longer trips to compensate for missed travel, utilize increased vacation time, and seek immersive experiences.



YOUNGER PARENTS ARE BRINGING EVERYONE

Family travel is undergoing a transformation. A recent study shows that 58% of Millennial and Gen Z parents are considering bringing extended family members on vacation by 2025, which is almost double the rate compared to older generations.

This shift reflects a desire for shared experiences. The younger generation is redefining the concept of family time to be more inclusive, intentional, and meaningful.





TRAVELER BEHAVIOR

TRAVELERS ARE BOOKING TRIPS AROUND LIVE EVENTS

The influence of entertainment on travel itineraries is projected to significantly grow by 2025. A substantial 60% of travelers are already organizing their journeys around concerts, festivals, or sporting events, emphasizing that the travel experience is not solely about reaching a destination but also about actively participating in significant events.

This trend presents a prime opportunity for brands and destinations to strategically focus on event-driven marketing initiatives.



60%

PLAN TRAVEL AROUND
SPORTS AND EVENTS



50% of Millennials and Gen Z participants purposefully travel in search of premium handmade/authentic goods specific to that destination.

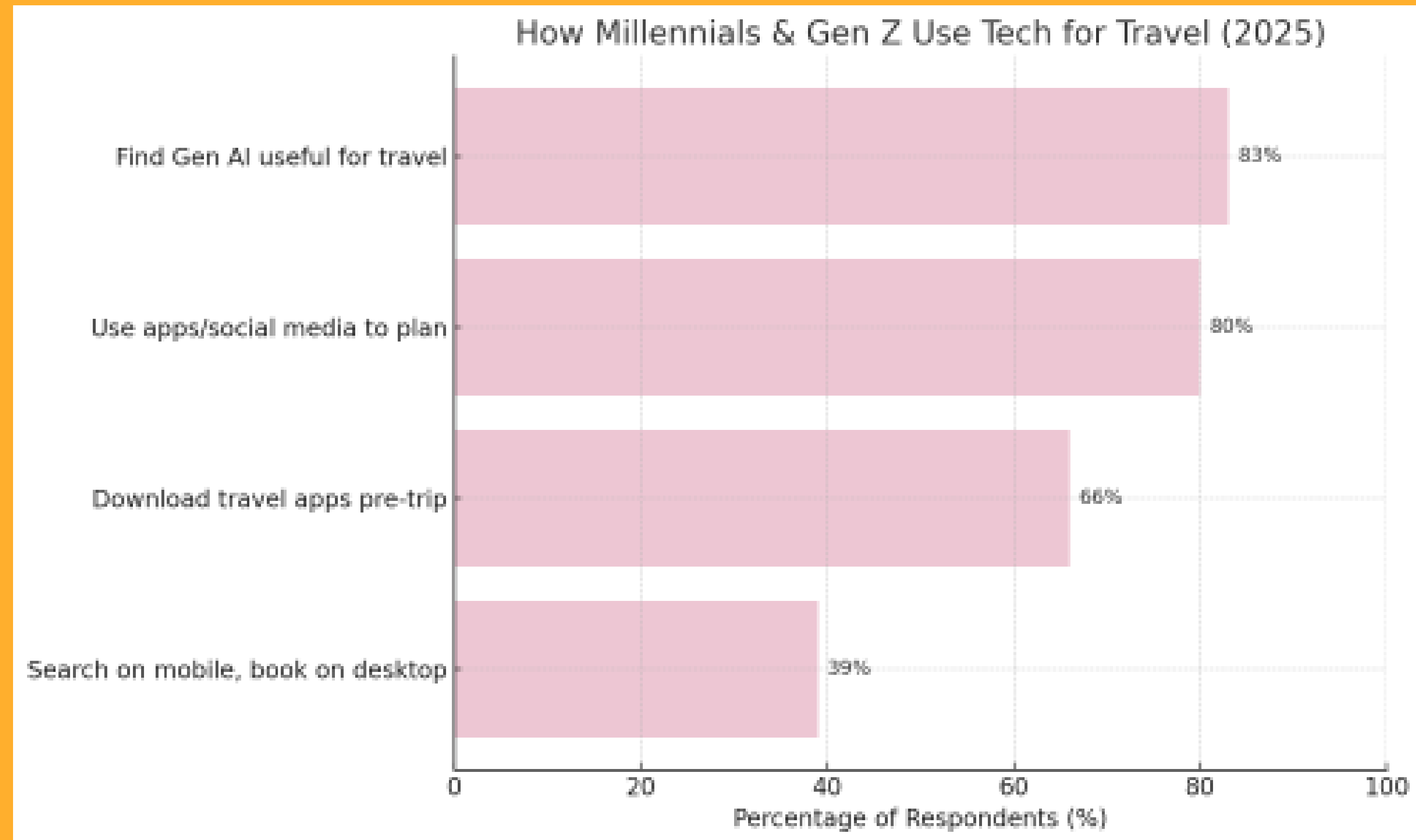


TRAVELER BEHAVIOR

GEN Z & MILLENNIALS USE TECH TO PLAN TRAVEL

Millennials and Generation Z individuals are not only adept with technology but also excel at travel-hacking. A significant 83% utilize Generation AI for planning purposes, while 80% rely on applications or social media, and two-thirds opt to download travel applications prior to embarking on a journey.

They are seamlessly integrating personalization with precision, taking charge of every aspect of their travels using tools that operate in real-time. This level of control allows them to navigate their journeys with efficiency and customization.





GEN AI IS BOOSTING CUSTOMIZATION, CONVENIENCE AND CONFIDENCE

Millennials and Gen Z optimize Gen AI for convenience, customization, and confident decision-making.

40% Use Gen AI for activity recs

36% Use it for budgeting help

33% Rely on Gen AI for translation

33% Use it for personalized trip planning.

The younger generations, Gen Z and Millennials, have a growing expectation for AI to play the part of a personal concierge rather than just a tool.

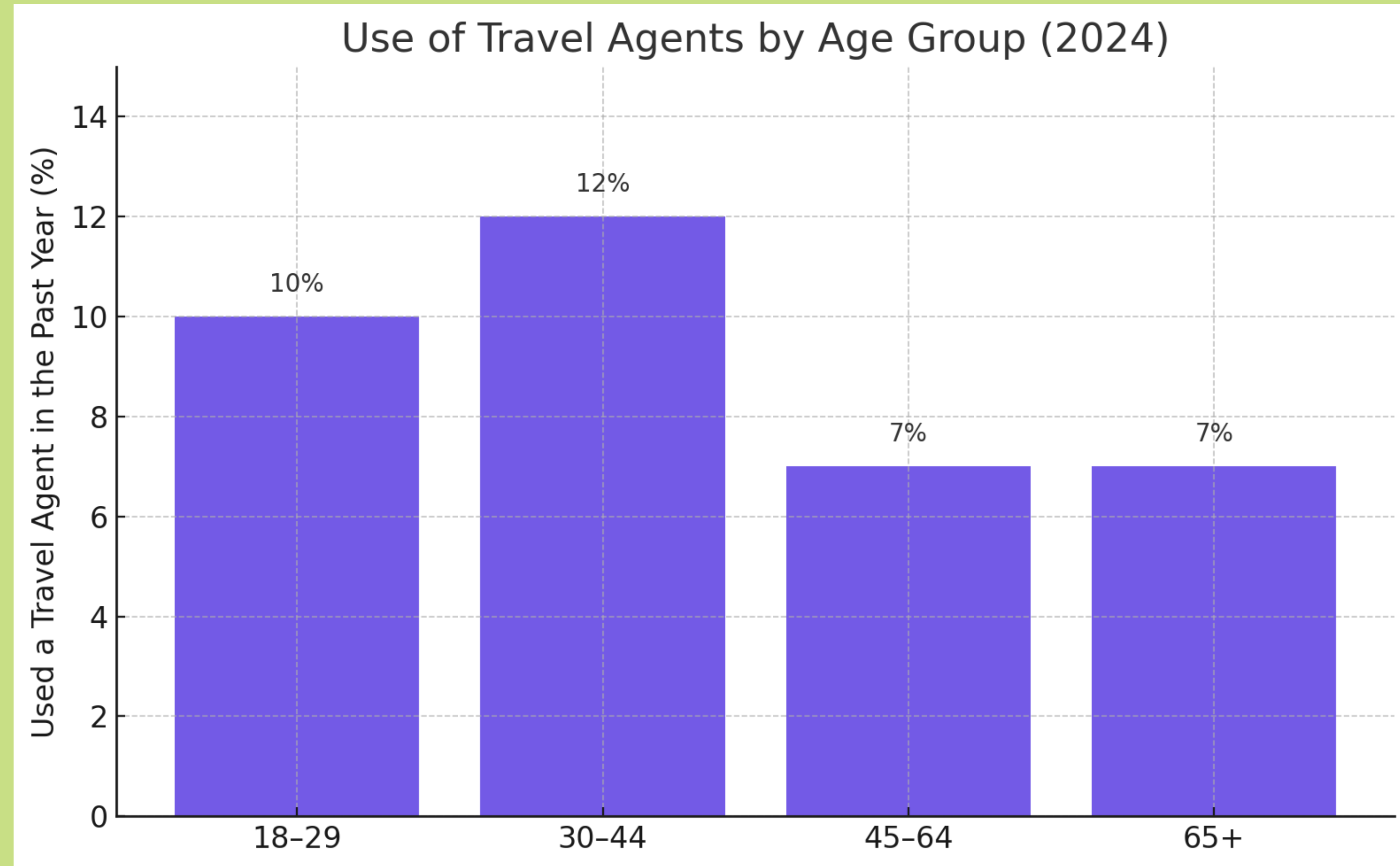
Brands, especially OTAs and DMOs, that seamlessly incorporate AI-driven personalization throughout the entire customer journey, spanning from initial discovery to booking and even in-trip services, are not merely meeting these expectations. They are going to become indispensable entities that cater to the modern consumer demands.



YOUNGER TRAVELERS ARE REVIVING THE ROLE OF TRAVEL AGENTS

Younger travelers are adopting Gen AI help, to be sure. But, travel agents are making a quiet comeback—especially among younger travelers. In 2024, 10% of those aged 18–29 and 12% of those 30–44 reported using an agent, compared to just 7% among older adults.

This shift reflects a hybrid planning mindset: digital-first travelers still value expert guidance, especially for complex or high-investment trips.





TRAVEL + TOURISM 2025

Outstanding Tourism Campaigns





While COVID emptied most destinations, we helped Gatlinburg defy the odds—becoming the only one to increase tourism. And our partnership has only gotten stronger since.

23M+ YouTube Views

537M+ Total Impressions

273K+ Vacation Guide Downloads

WHY IT MATTERS:

Messaging tailored to key traveler segments—outdoor adventurers, families, and experience seekers

Delivered higher engagement and increased hotel bookings, ensuring every media dollar delivered results

Maintained a brand ID while adapting messaging seasonally, extending the campaign across multiple years

Data-driven adjustments to copy, visuals, placements and targeting ensured content stayed relevant and performing

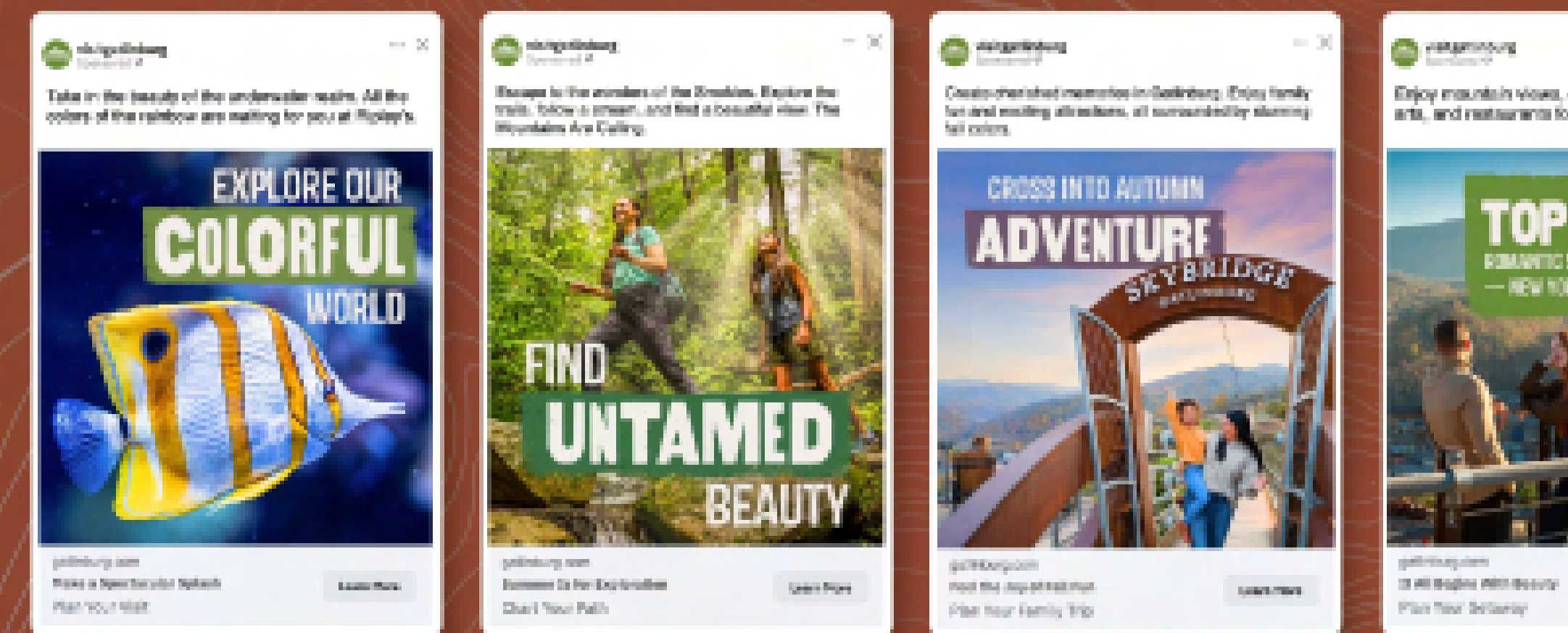
Potential to collab for co-advertising opportunities

Regularly coordinate with external partners to ensure cohesion





DON'T TAKE IT FROM US...



“Designsensory has been an amazing and responsive partner since 2019! The attention to detail and the thoughtfulness that goes into creating our campaigns has been fantastic.”

—CHAD NETHERLAND
CEO + PRESIDENT



[Watch now →](#)

How do you showcase an entire state? One story at a time. Designsensory captured the soul of 51 Tennessee counties in a groundbreaking cooperative development campaign only we could deliver.

26 Counties removed from the list of economically distressed counties since we began the work

210 Total Hours of Raw Video Delivered Across 11,462 Clips

WHY IT MATTERS:

Our digital-first approach benefited both Tennessee and its counties—just as your destination and its partners can leverage dynamic content for broader reach.

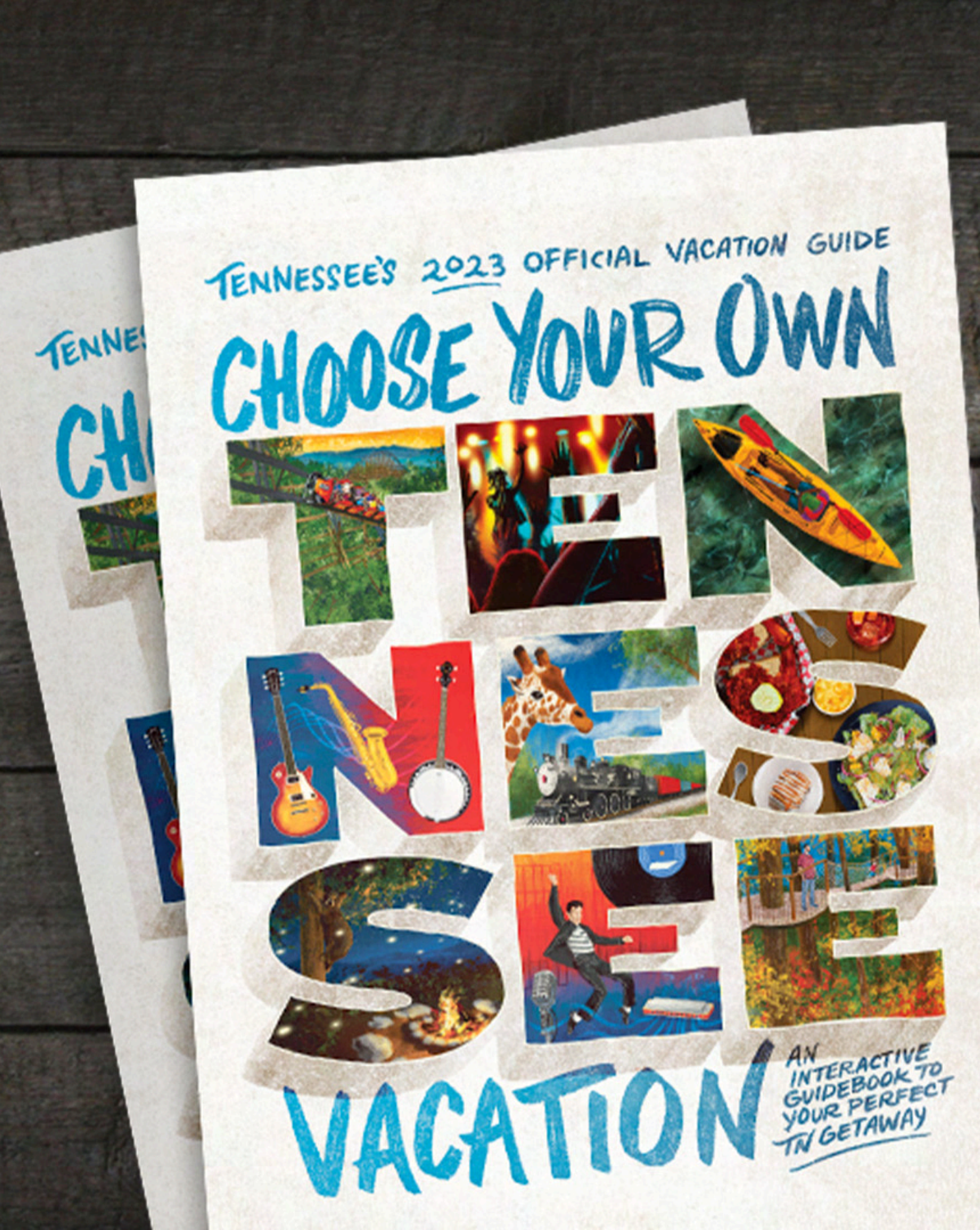
We know the state, the counties, and what makes Tennessee unforgettable—and we'll find the same for your destination.

We crafted stories highlighting diverse experiences across counties and seasons. Your destination needs to highlight everything it offers year-round, too.





DON'T TAKE IT FROM US...



“Because of the excellent project management, creative and execution provided by Designsensory on Tennessee’s Rural Tourism Photography and Video program, we have been able to provide new assets to 50 counties across the state.”

—MELANIE BEAUCHAMP
ASST. COMMISSIONER, RURAL TOURISM + OUTREACH



Augusta isn't just for The Masters. Through the "Legendary Hospitality" and "Get Off the Green" campaigns, geo-targeted media and high-impact digital made travelers and media planners believe that it's a destination worth visiting year-round.

\$553M+ Increase in Visitor Spending

88K+ Clicks to visitaugusta.com

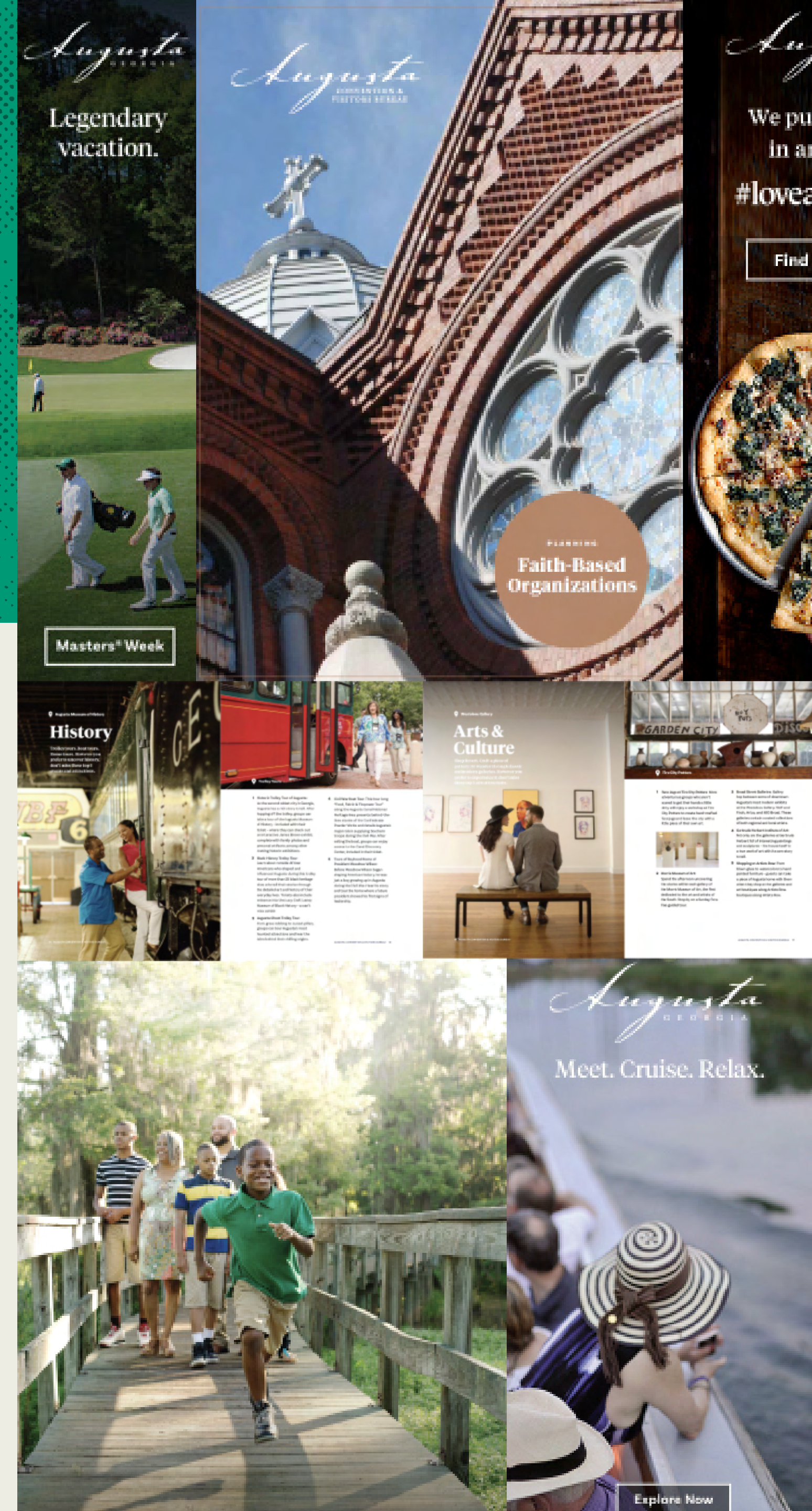
WHY IT MATTERS:

Smart placements put Augusta in front of travelers already looking for their next trip.

Just like Augusta, your destination is more than just its biggest events—we know how to drive year-round visitation.

Custom creative speaks directly to vacationers looking for adventure and planners scouting the perfect conference destination.

Augusta's Masters strategy led to 100% hotel occupancy, and we'll apply the same data-driven approach to your destination.





DON'T TAKE IT FROM US...



“The team is creative, responsive, and data-driven, striking the perfect balance between listening and pushing back when needed.

They bring deep industry expertise.”

—BENNISH BROWN, TMP
PRESIDENT + CEO



OTHER OUTSTANDING TOURISM CAMPAIGNS



Vienna Tourist Board: Microdose Vienna

This unique campaign condensed six Viennese experiences into limited-edition pill sets, each representing aspects of Vienna's heritage. These symbolic capsules were sent to media outlets and influencers, offering an experiential glimpse into the city's cultural legacy.



Expedia: Northern Lights

Featuring a heartfelt story of a multi-generational family trip to see the Northern Lights, this campaign tapped into themes of fulfilling lifelong dreams. Narrated by Ewan McGregor, it aired during the Super Bowl pre-game and included travel guides, a shoppable landing page, and out-of-home activations to inspire bookings.



So Much South Dakota, So Little Time

This campaign utilized traditional, digital, and OOH elements to showcase South Dakota's diverse attractions. Launched with Super Bowl video placements, it targeted families, older couples, and thrill-seekers through social media, email marketing, paid search, billboards, print ads, and audio partnerships.



OTHER OUTSTANDING TOURISM CAMPAIGNS



Tourism New Zealand

Celebrating its 25th anniversary, this campaign was refreshed to position New Zealand as a year-round destination. It emphasized off-peak experiences through striking visuals and stories across multiple platforms, incorporating user-generated content via the hashtag #IfYouSeekNZ to enhance authenticity and reach.



Tourism Ireland

Marking the 10th anniversary of the Wild Atlantic Way, this campaign featured a social media takeover, targeted videos, and a global PR push. It aimed to inspire travelers by showcasing Ireland's scenic landscapes and cultural richness, encouraging user-generated content with hashtags #FillYourHeartWithIreland and #LoveIreland.



ScotRail

This campaign showcased Scotland's diverse destinations accessible via the ScotRail network, from rugged landscapes to historic cities. The tagline "Your ticket goes further than you think" highlighted train travel as a cost-effective and eco-friendly way to explore Scotland.



TRAVEL + TOURISM 2025

Next Steps + Final Thoughts





Embrace Digital Transformation

We've seen the growing dominance of online bookings, with projections indicating that online sales in the travel and tourism sector will hit 75% by 2029. DMOs need to prioritize user-friendly websites, mobile platforms, and search optimization to capture a broader audience.

Personalization is Paramount

Travelers, especially Millennials and Gen Z, expect personalized experiences. DMOs should leverage AI to offer customized trip planning, activity recommendations, and even budgeting assistance.

Showcase Unique Experiences

There's a strong consumer demand for authenticity and immersive experiences. DMOs should showcase what makes their destination unique, focusing on cultural richness, eco-friendly options, and opportunities for genuine connection.

Give Younger Travelers What They Seek

Millennials and Gen Z are not only traveling more but also spending more. They're tech-savvy, value rewards, and seek both leisure and 'bleisure' travel. DMOs need to tailor their marketing to appeal to these demographics.

**DIGITIZE.
PERSONALIZE.
GROW.**



Invest in AI

DMOs must invest in AI-driven technologies to provide personalized recommendations and enhance the overall customer journey. This tech should act like a personal concierge, not just a tool.

Content is Still King

High-quality content that showcases the destination's unique offerings is essential. DMOs should focus on storytelling that highlights authentic experiences and cultural richness.

Embrace Bleisure Travel

A significant number of business travelers (66%) are extending their trips for leisure. DMOs should promote activities and experiences that can easily be added to a business trip, targeting those looking to mix work and play.

Leverage Live Events

Travelers are planning trips around concerts, festivals, and sporting events. DMOs should partner with event organizers to offer travel packages and promote the destination as an ideal location for event-related travel.

**LEVEL UP
YOUR DMO
STRATEGY**



FOR MORE THAN TWO DECADES, WE'VE SET THE STANDARD IN DESTINATION MARKETING.

We know travel and tourism marketing inside and out. If you're a destination or attraction who's tired of the same tired approaches, and you're ready to become irresistible to visitors, get in touch.



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Stock imagery: Unsplash





Thank You

ABOUT DESIGNSENSORY

Designsensory, founded in 2001 by Joseph Nother and Brandon Rochelle, is a full-service, integrated marketing agency with a deep creative, digital and strategic capabilities. We help brands tell stories, tackle opportunities and solve problems through a spectrum of services, innovative solutions and customized products. We collaborate with the best talent and influencers to create bold, branded content. We spark action and originality with our human-centric culture that embraces innovation, servant-leadership and transparency.

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