Artificial intelligence, digital marketing and data management: Situation and outlook for Swiss tourist offices in 2024

Results of an online survey conducted in January 2025

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February 2025







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1. Managerial summary: The study

In January 2025, the Institute of Tourism (ITO) at HES-SO Valais-Wallis conducted an online survey, the seventh in its series since 2015, probing the digital practices and strategies of Swiss tourism organizations (TOs).

Our study was carried out as part of the Resilient Tourism project. The **Innosuisse-supported** *Resilient Tourism* Flagship (www.resilienttourism.ch) aims to foster the datafication of the Swiss tourism and travel sector, in order to create digitally-supported resilient services, processes and business models. The program has been designed by six research institutes in partnership with over 30 Swiss players in the tourism sector.

The study assesses the evolution of digital marketing trends, including the use of social networks, strategic data management and analysis, and the integration of artificial intelligence (AI) into tourism operations.

The data was collected via an online questionnaire, to which 79 organizations responded, providing a detailed insight into the current innovations and challenges facing the Swiss tourism sector. This substantial sample provides a solid basis for analyzing current practices and anticipating future directions for TOs in the digital age.

1. Managerial summary: Use of social networks

Between 2015 and 2024, the use of social networks by Swiss Tourist Offices has evolved significantly, with a growing dominance of visual platforms such as **Instagram** (97%) and **YouTube** (70%), as well as the emergence **of TikTok** (41%). LinkedIn (81%) is emerging as a strategic tool for corporate communication and partnership development. Traditional tools such as **Facebook** (99%) and **Google Review** (58%) remain essential pillars, while others such as Twitter/X and Pinterest are losing importance. This evolution illustrates a strategic adaptation to new digital trends, with an emphasis on engaging content and direct interaction with audiences.

In 2024, Swiss Tourist Offices will mainly be using social networks to raise **awareness of** their destinations (87%), **engage visitors** (76%) and **promote their products and services** (73%). Increasing traffic to websites (63%) is also a key objective, while the use of networks as a service or feedback channel remains limited. These results show a **strategy focused on visibility and interaction**, with opportunities to exploit for a more customer- and quality-oriented approach.

In **conclusion**, Swiss tourist offices are adapting their social networking strategies to remain relevant and effective in an ever-changing digital landscape. They are prioritizing targeting and visibility tools to reach potential tourists, while managing the challenges posed by dynamic social platforms.

1. Managerial summary: Budget & Marketing

Analysis of budget data shows that 60% of the TOs surveyed have an overall budget of CHF 1 million or more. Although the use of social networks by tourists has increased considerably, TOs continue to allocate relatively modest resources to these channels, despite a gradual increase in investment in recent years. In 2024, the median budget for search engine marketing was CHF 31,285 (CHF 202,409 for large TOs), while social network campaigns had a median budget of CHF 26,062 (CHF 115,363 for large TOs). This underlines the growing but still limited prioritization of digital channels in TO marketing strategies.

On average, **1 in 7 office jobs is dedicated to online marketing**. Around two-thirds of organizations devote less than 15 hours a week to social network management (the median value is 9.5 hours). **Investment in time and personnel is proportional to the size of the organization**, with larger destinations investing more in social networks. Cumulative totals reflect a variety of financial and resource commitments, indicating a diversity of strategic approaches among destinations of different sizes.

1. Managerial summary: Using data

The survey highlights a **growing awareness of the importance of data**, with **37% of EOs claiming to have a clear strategy respectively human resources in the area of data**, marking a significant improvement on 2018. This increase reflects a growing awareness of the importance of data in guiding strategic and operational decisions. Data collection is primarily driven by **marketing** needs and the **personalization of** the customer experience, as well as its exploitation as a **source of monitoring** and knowledge enhancement. These priorities underline the need to invest in the skills and tools required for effective data management.

However, **significant challenges remain**, including **lack of human and financial resources**, **regulatory constraints**, **user costs** and **technical skills gaps**. These obstacles hinder the fully strategic adoption of data, despite its growing recognition as an essential lever for performance optimization and decision-making.

1. Managerial summary: The use of artificial intelligence (AI) by IoTs

AI adoption: The integration of artificial intelligence in Swiss Tourist Offices (TOs) is growing, but still limited. A majority of TOs (52%) have started using AI recently, and 8% plan to adopt it soon. However, around a quarter of TOs are still not using these technologies, mainly due to resource constraints, costs, and a lack of technical understanding.

Areas of use: IoTs make extensive use of AI for **marketing-related** functions, including content generation and digital communication. AI is also applied to **personalizing the customer experience**, **optimizing operational processes**, and managing customer relationships. These areas reflect strategic use to improve efficiency and customer engagement. However, areas such as tourism flow management or forecasting remain under-exploited.

1. Managerial summary: The use of artificial intelligence (AI) by IoTs

Challenges to overcome: The main obstacles to AI adoption include the **lack of quality data**, the **lack of in-house technical skills**, and the **high cost of implementation**. Strict data protection regulations and the difficulty of integrating AI into existing processes also hamper its implementation. These challenges underline the need to invest in training, improve access to accessible and reliable solutions, and strengthen data infrastructures.

Conclusion: Although AI adoption is still in its early stages in the Swiss tourism sector, it has recognized potential to improve efficiency, communication, and visitor satisfaction. TOs will need to overcome structural and technical challenges to maximize the impact of AI, with a particular focus on improving skills, data quality, and raising awareness of the strategic benefits of these technologies.

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2. Background and existing studies

From 2015 to 2024, the HES-SO Valais/Wallis conducted several online surveys among Swiss tourism offices (TOs) to gather information on social media use and online marketing strategies. Starting in 2019, these surveys also incorporated data management analysis. The results, offering valuable insight into current trends and practices, are available on the Observatoire Valaisan du Tourisme - Tourobs website (www.tourobs.ch):

- Use of Social Networks by Swiss Tourism Organizations. Results of an online survey from March 2015. LINK
- Online marketing and use of social networks by Swiss tourism organizations in 2016. LINK
- Digital marketing, social networks and smart technologies in Swiss tourism organizations in 2017. LINK
- Social networks and data usage in Swiss DMOs in 2018. LINK
- Digital marketing, social networks and the use of data in Swiss tourism organizations in 2022. LINK
- Artificial intelligence, digital marketing and data management: Situation and prospects for Swiss tourist offices in 2023 LINK

2. Background

- This current study was carried out as part of the *Resilient Tourism* project. The ***Resilient Tourism* Flagship** (www.resilienttourism.ch) supported by **Innosuisse** aims to foster the datafication of the Swiss tourism and travel sector, in order to create resilient, digitally-supported services, processes and business models. The program has been designed by six research institutes in partnership with over 30 Swiss players in the tourism sector.





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3. Method - Questionnaire

The survey for the 2024 study is based on a number of key points (see appended questionnaire):

I. The **presence of TOs on social networks** evaluates which platforms are actively used and the effect on web traffic. Under marketing objectives, we examine the goals pursued by TOs (for example, the use of social networks to enhance reputation or engagement, as well as to generate traffic).

II. The **marketing resources** section covers the budget and personnel allocated to digital marketing.

III. The **"data"** section looks at the objectives and challenges associated with data collection and analysis.

IV. Finally, the section on the **use of artificial intelligence** explores the integration of AI in IoT and its impact on the tourism sector.

3. Method - Survey and sample administration

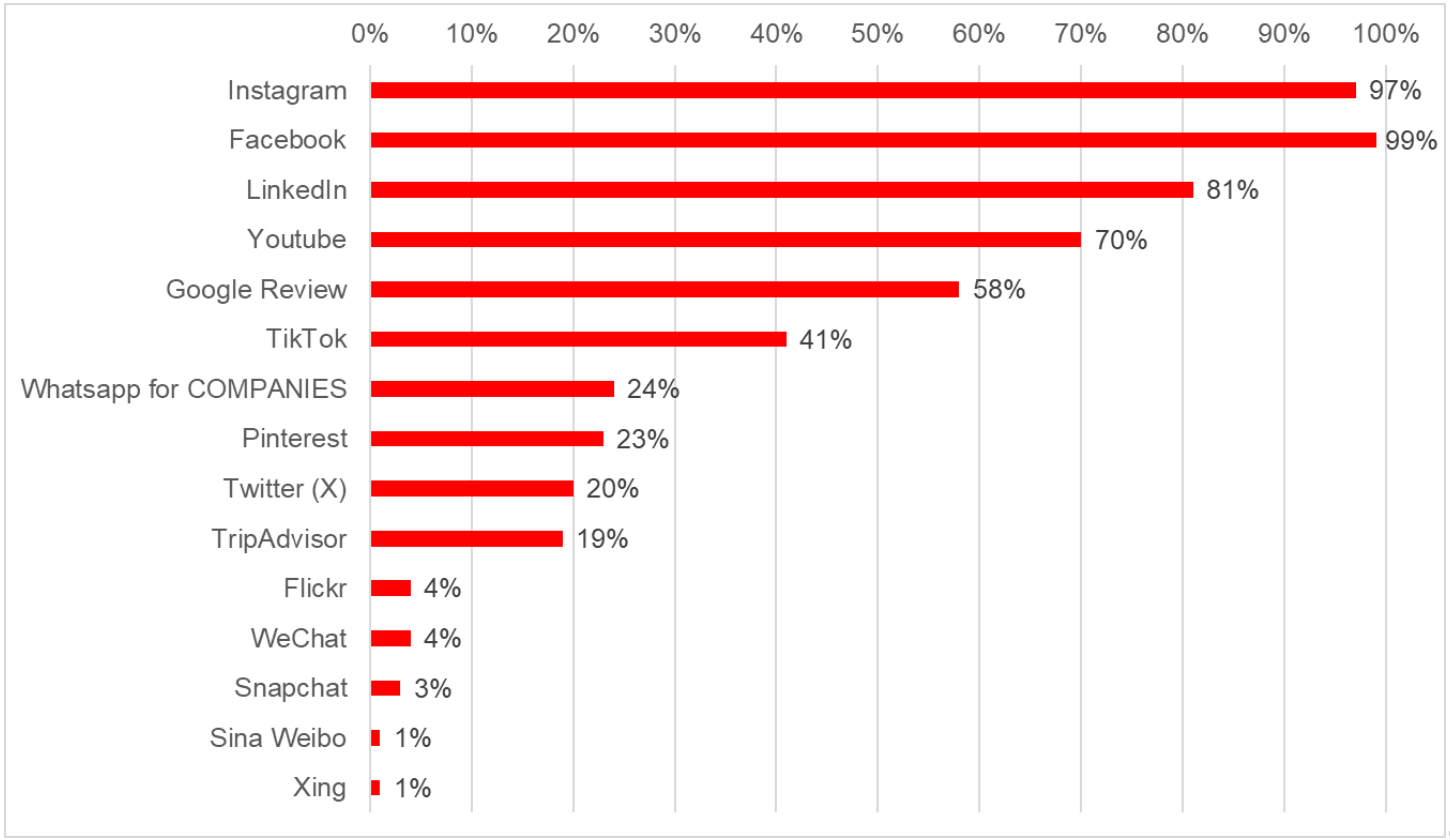
In January 2024, the Institute of Tourism (ITO) at HES-SO Valais-Wallis conducted an online survey of Swiss tourist offices (TOs) for the sixth time since 2015. At all levels (local, regional). A total of 476 people from 332 TOs were contacted and 79 organizations responded to the survey.

- The cohort of participants in the 2024 survey (n=79) shows remarkable continuity with that of the previous year (n=89), indicating a consistency in sampling that enables reliable annual comparisons to be made. It should be noted that, although the overall sample is stable, the number of responses may fluctuate from question to question, due to partial non-response to certain questionnaire items.
- Geographical distribution: mountain region (48%), city (20%), other (32%) *[2023 survey profile: mountain region (44%), city (14%), other (42%)].*
- Distribution according to size :
  - Very small (< 0.1 mio overnight stays) / 26% [2023: 23%]
  - Small (0.1 -0.5 mio overnight stays) / 33% [2023: 32%]
  - Average (0.5 -1 mio overnight stays) / 19% [2023: 21%]
  - Large (> 1 mio overnight stays) / 21% [2023: 24%]

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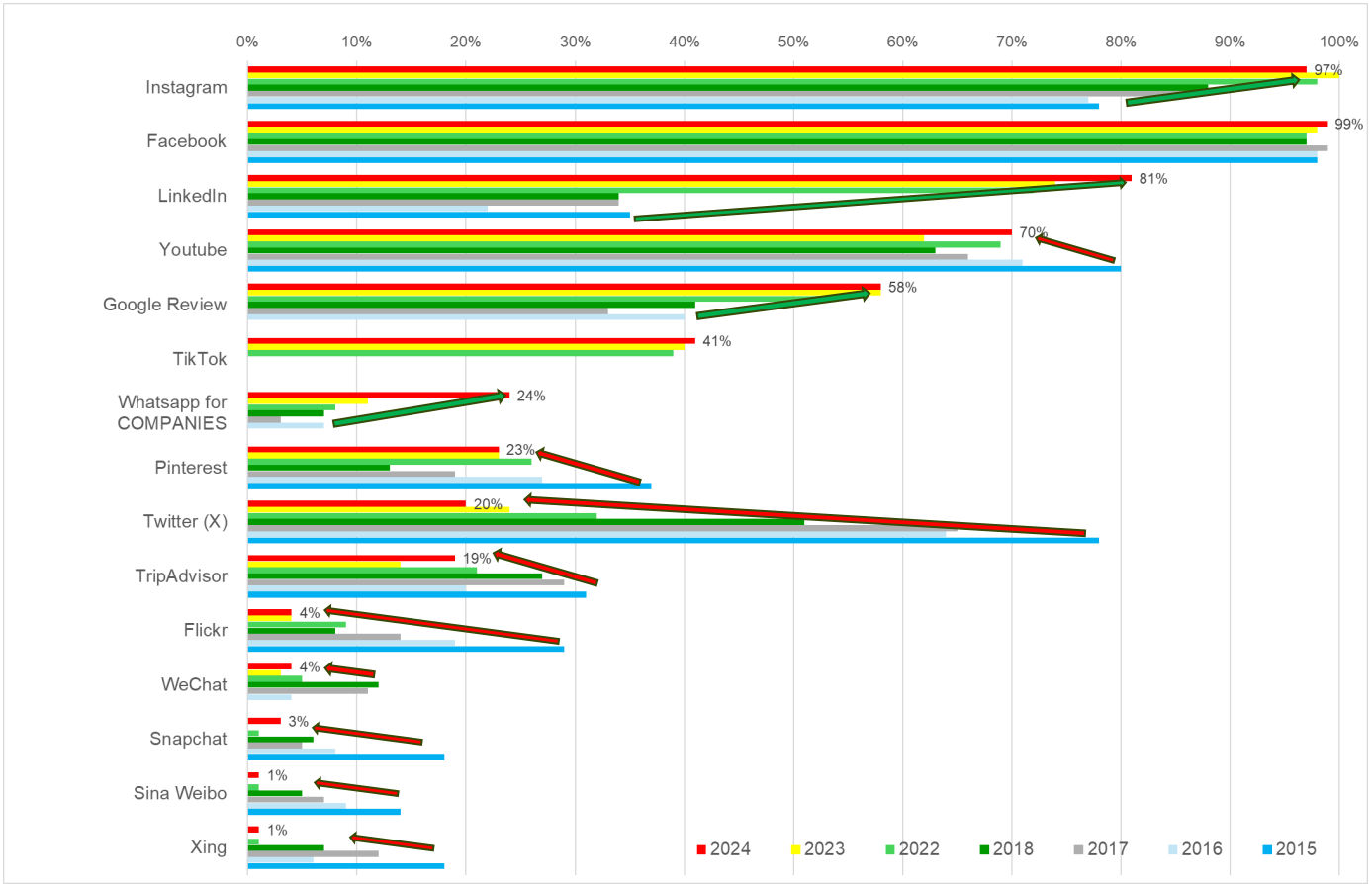
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4. Use of social networks in Swiss TOs in 2024



n = 79

4. Evolution of the use of social networks in Swiss TOs between 2015 and 2023 (I)



4. Trends in the use of social networks in Swiss TOs between 2015 and 2024 (II)

The analysis shows several interesting trends over the period 2015 to 2024:

- **Instagram**: There has been a steady increase in presence on Instagram, culminating in universal use (100%) in 2023 and an insignificant decline in 2024 (-3%). This underlines the major importance of this network for visual marketing in tourism.
- **Facebook**: Facebook has remained extremely popular with EOs, and a solid presence throughout the years. (99% in 2024)
- **LinkedIn**: A sharp increase in LinkedIn use is observed, rising from 35% in 2015 to 81% in 2024, indicating a growing interest in professional networking and business opportunities by EOs.
- **YouTube**: After an 18% drop in Youtube usage in 2023, the trend is up again in 2024 (+8%).
- **Google Review**: The usage rate remains stable at 58% in 2024, showing that collecting online reviews remains essential for tourism businesses.
- **TikTok**: Included in the survey for the first time in 2022 with 39%, use of the platform continues to grow, increasing slightly to 41% in 2024.

4. Evolution of the use of social networks in Swiss TOs between 2015 and 2023 (III)

Platforms in decline or stagnation

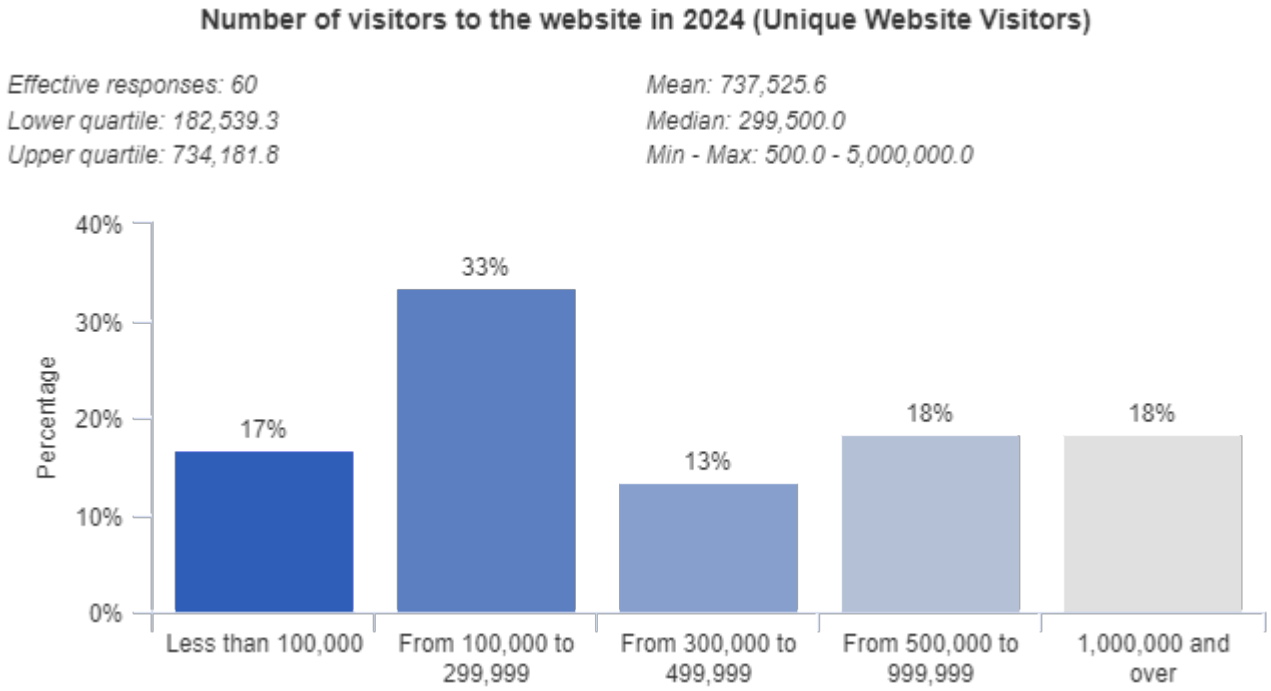
- **Twitter (X)**: Its use has declined, perhaps reflecting a limited impact for EO in Switzerland.
- **Pinterest, TripAdvisor and Flickr**: These tools have lost importance, indicating that they are less relevant in today's strategies.
- **Snapchat, Sina Weibo, Xing**: Their adoption remains marginal, either because of their limited relevance to the Swiss market, or because of overwhelming competition from other platforms.

New professional uses

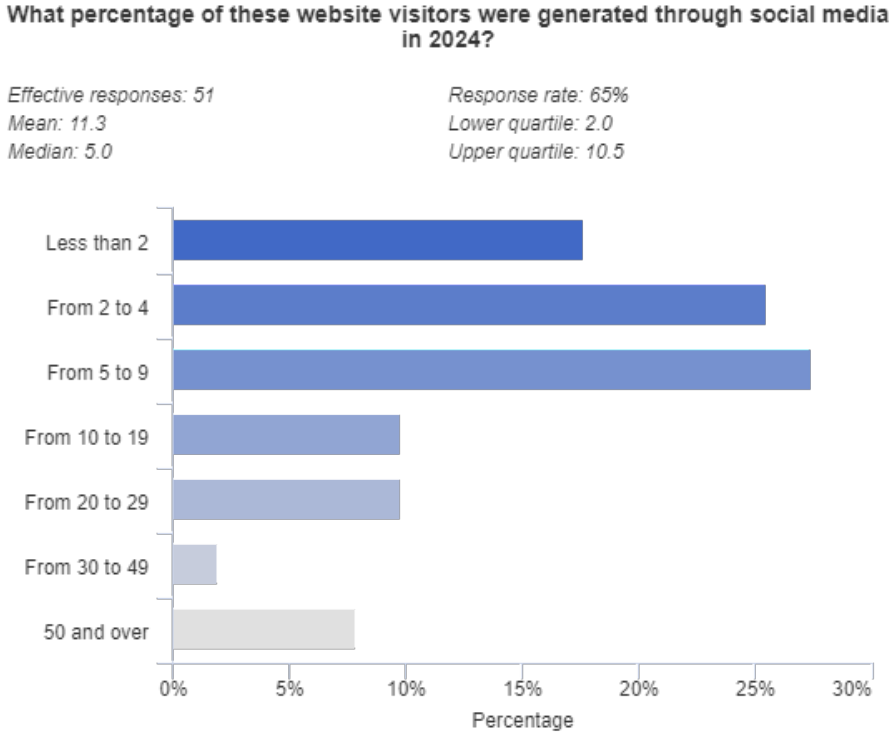
- The introduction of **WhatsApp for Companies** (24%) marks a diversification of channels, probably for direct, personalized contact with customers.

Swiss TOs are adapting their strategies in line with global trends and user preferences. Visual and video platforms (Instagram, YouTube, TikTok) dominate, while classic tools like Facebook and Google Review remain essential. The decline of certain platforms (Twitter, Pinterest) shows an optimization of efforts towards high-impact tools. This trend reflects the importance of a diversified, targeted digital strategy in modern tourism.

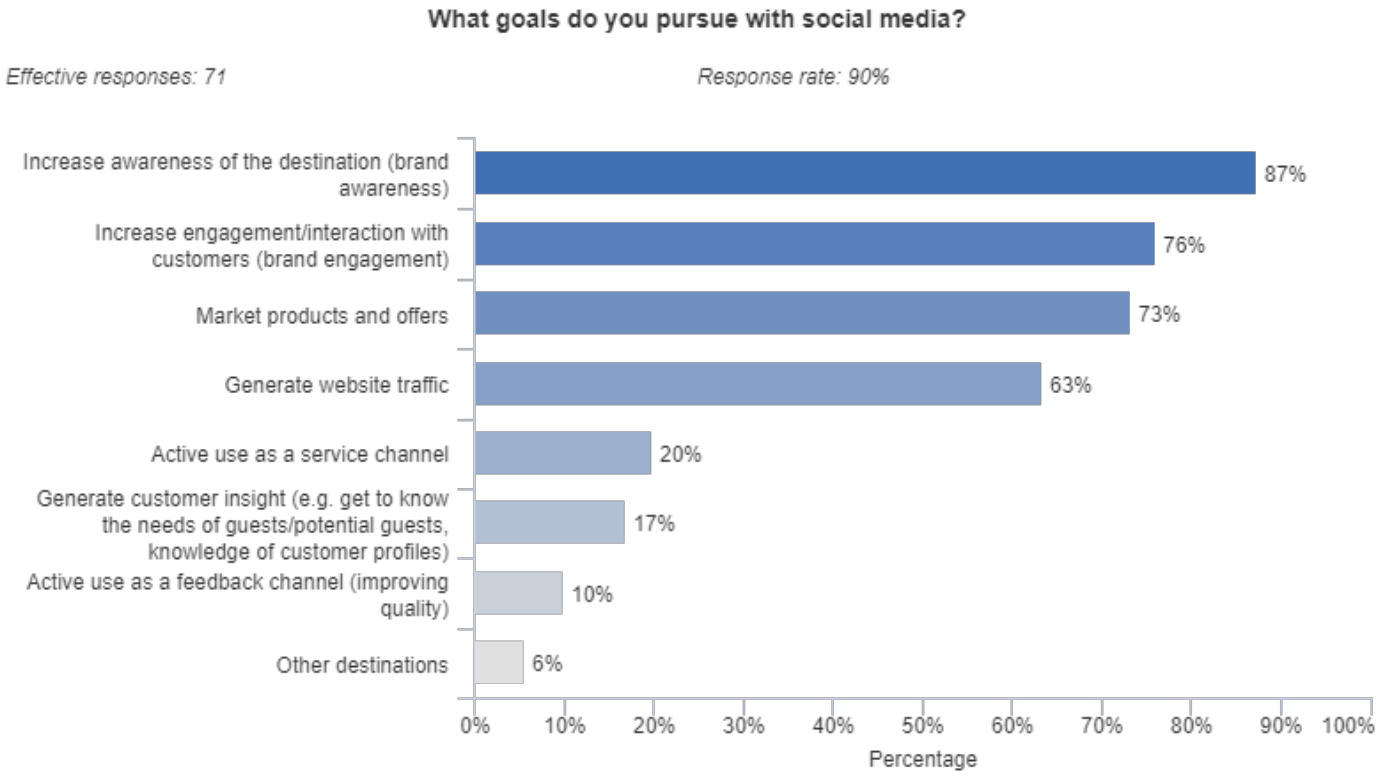
4. Number of visitors to the website in 2024



4. Percentage of website visitors generated via social media (in 2024)



4. Objectives for the use of social networks in Swiss TOs in 2024



4. Objectives of using social networks (II)

Main objectives

- **Improving destination awareness and reputation** (87%): Brand Awareness is the main objective, demonstrating that TOs are using social networks to boost their visibility and establish their image with potential visitors.
- **Engagement with visitors** (76%): "Brand Engagement" is also a priority, reflecting a desire to actively interact with current and potential visitors to create a lasting relationship.
- **Marketing products and services** (73%): TOs use social networks as a commercial lever to promote their tourism offerings.
- **Increase traffic to websites** (63%): This shows that social networks are also seen as a channel for generating traffic to more comprehensive and informative platforms.

4. Objectives pursued by the use of social networks in Swiss TOs

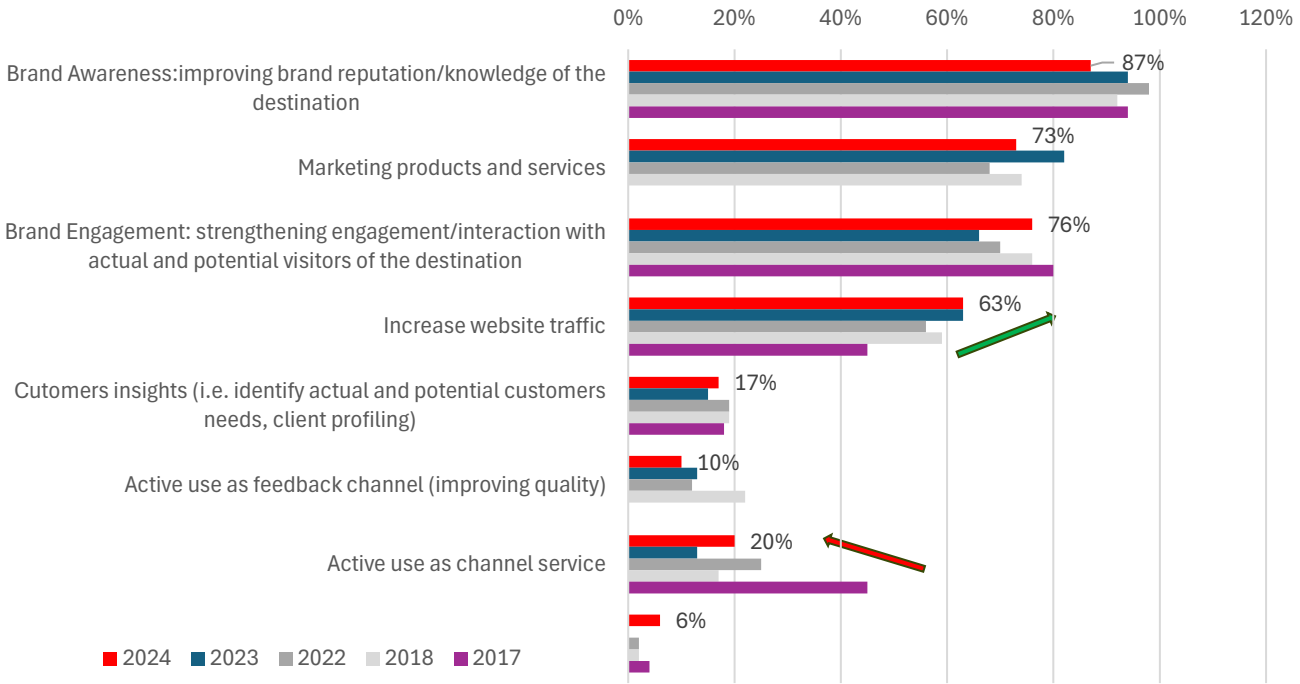
Secondary objectives

- **Service channel** (20%): A minority use social networks to provide services or answer questions in real time.
- **Customer Insight** (17%): Analyzing customer needs and profiles via social networks remains a less widespread practice, although it can offer valuable insights.
- **Feedback channel** (10%): Quality improvement through customer feedback is still under-exploited by TOs.

Conclusion

Swiss TOs focus primarily on improving their visibility, visitor engagement, and business promotion, while moderately exploiting social networks as customer service or feedback tools. This underlines a predominantly communications- and marketing-oriented strategy, with potential to evolve towards a more integrated and interactive approach.

4. Evolution of the objectives pursued by the use of social networks in Swiss TOs between 2017 and 2024



4. Frequency with which results are tracked on social networks in 2024

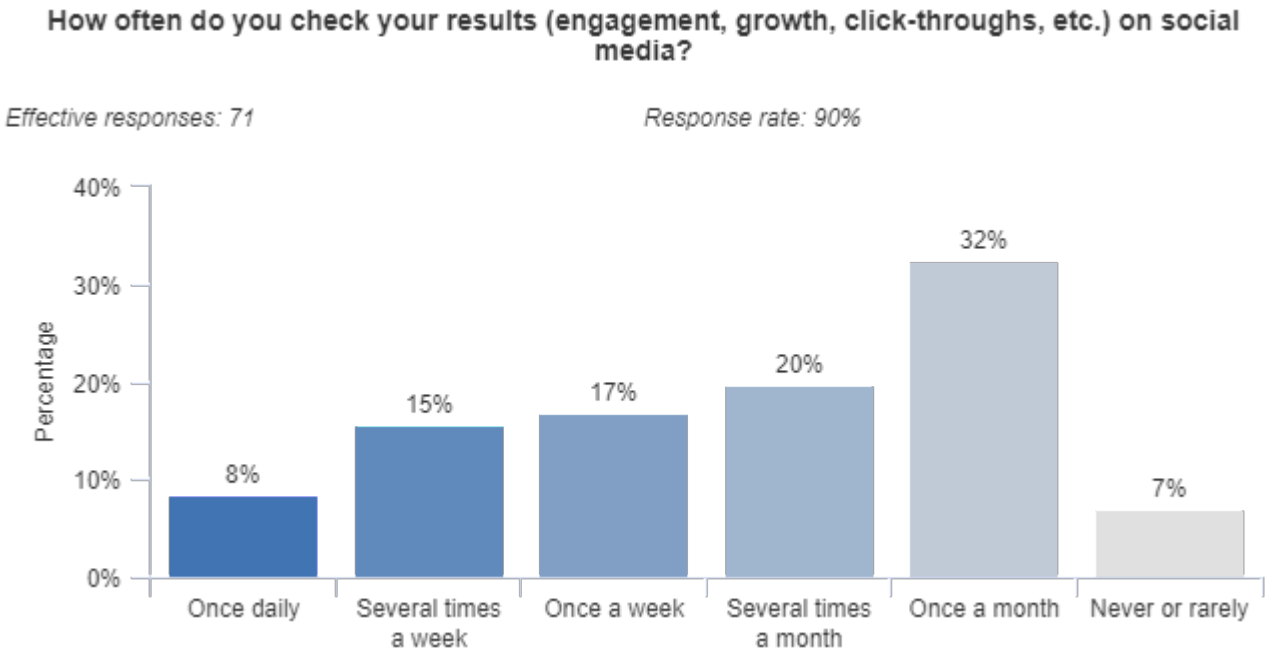
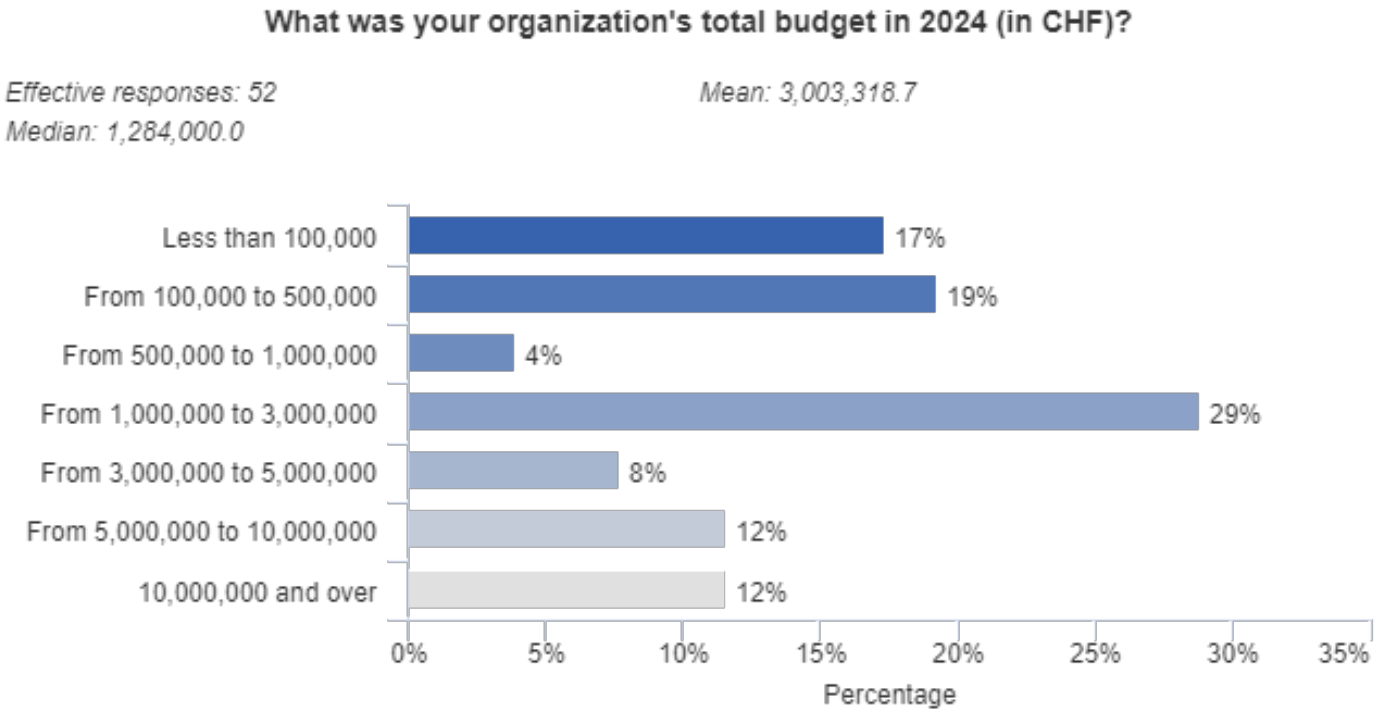


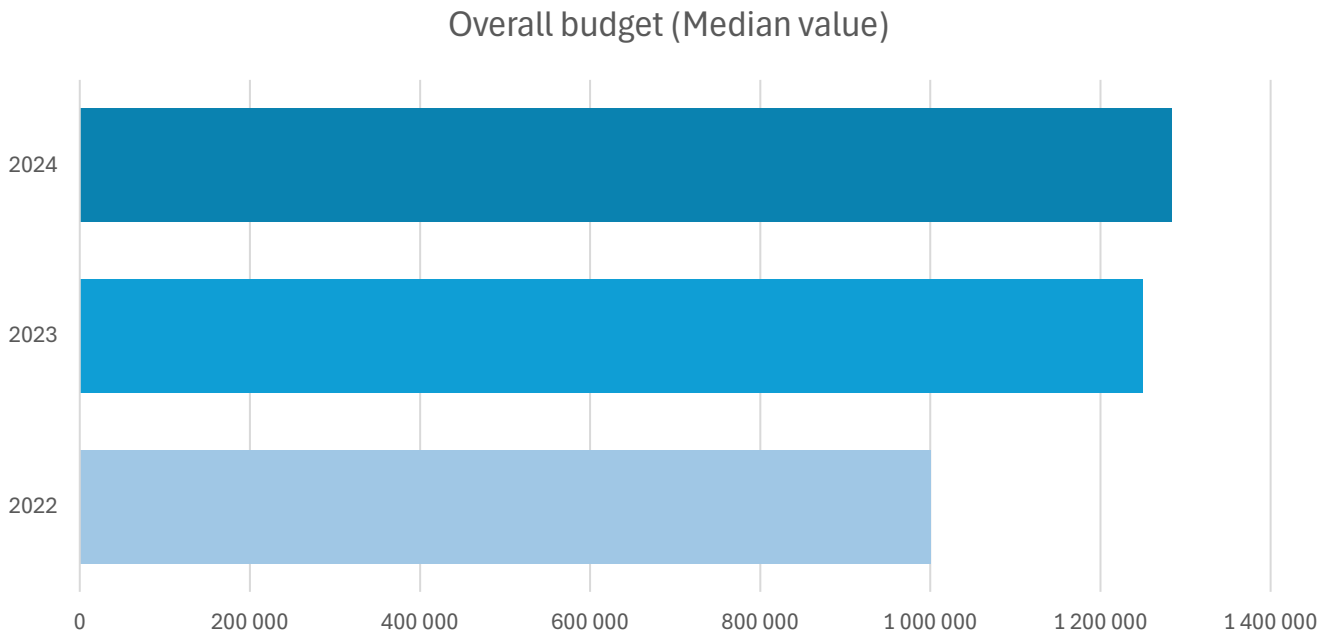
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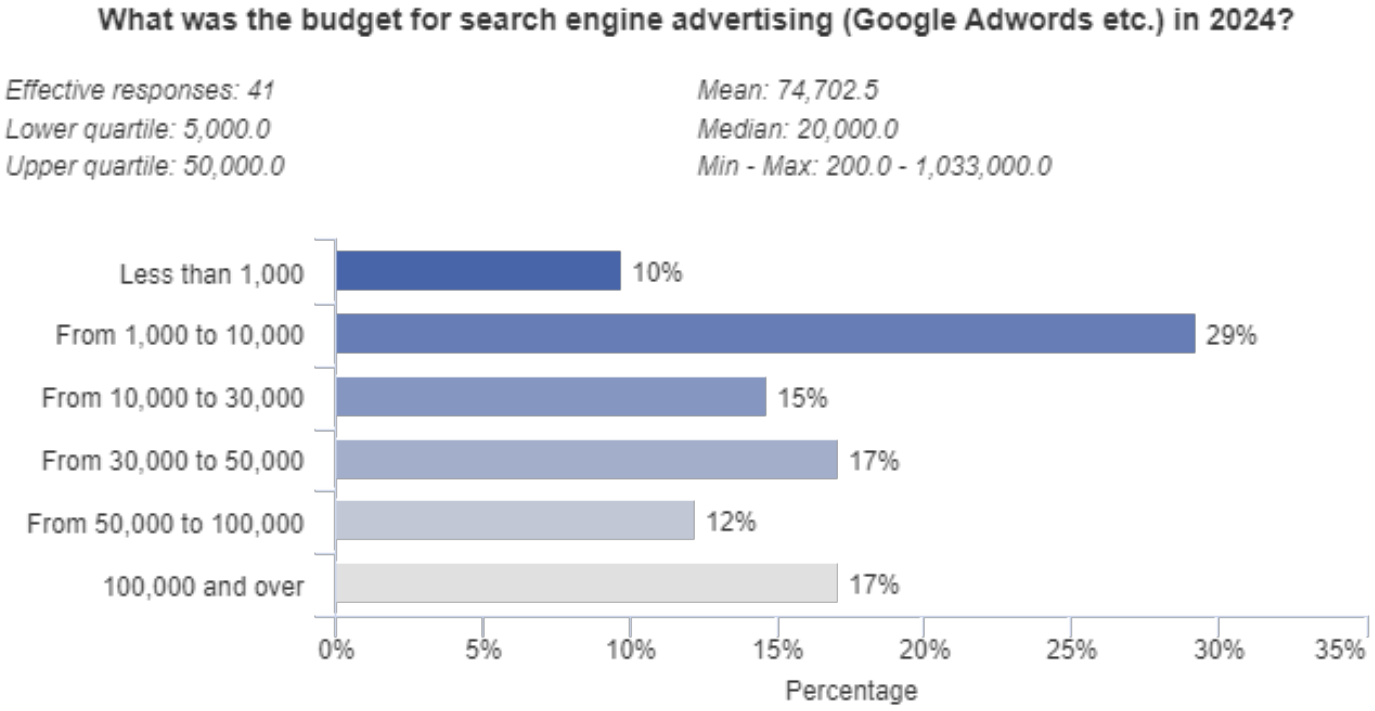
5. Global budget in 2024 (in CHF)



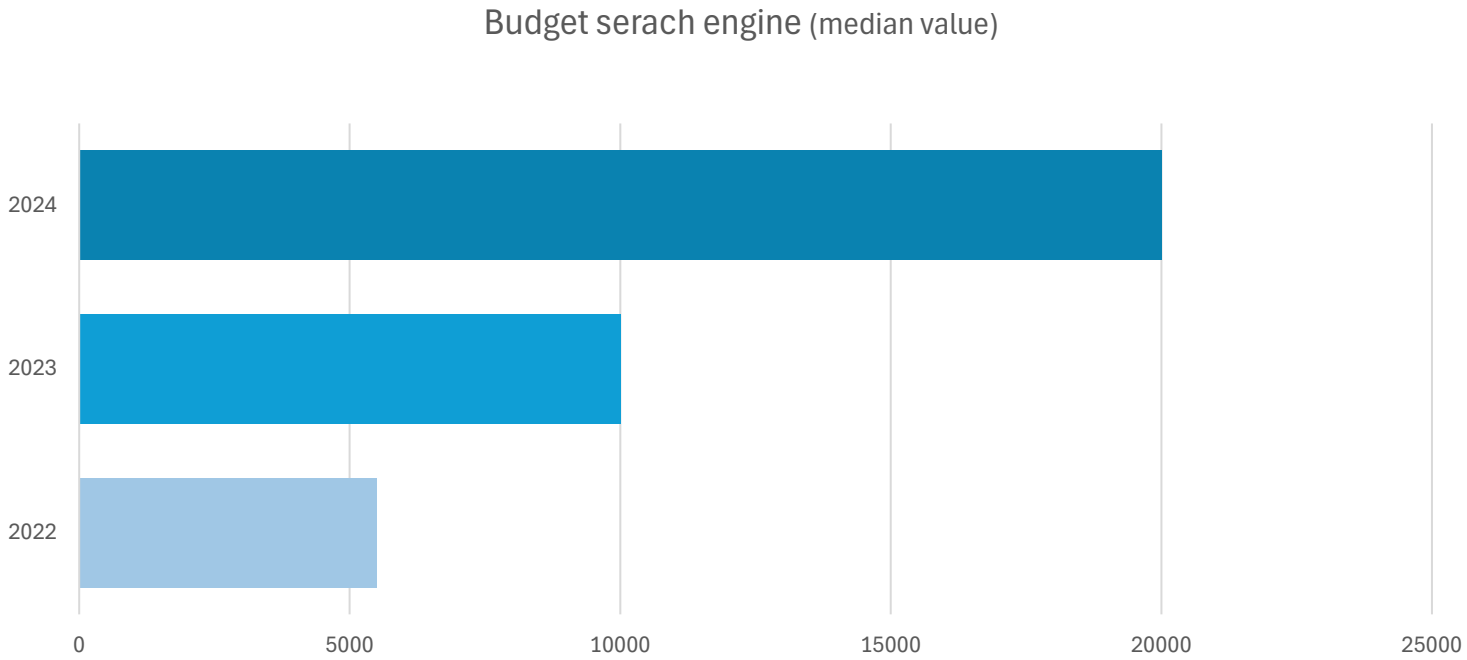
5. Overall budget 2022 - 2024 (in CHF)



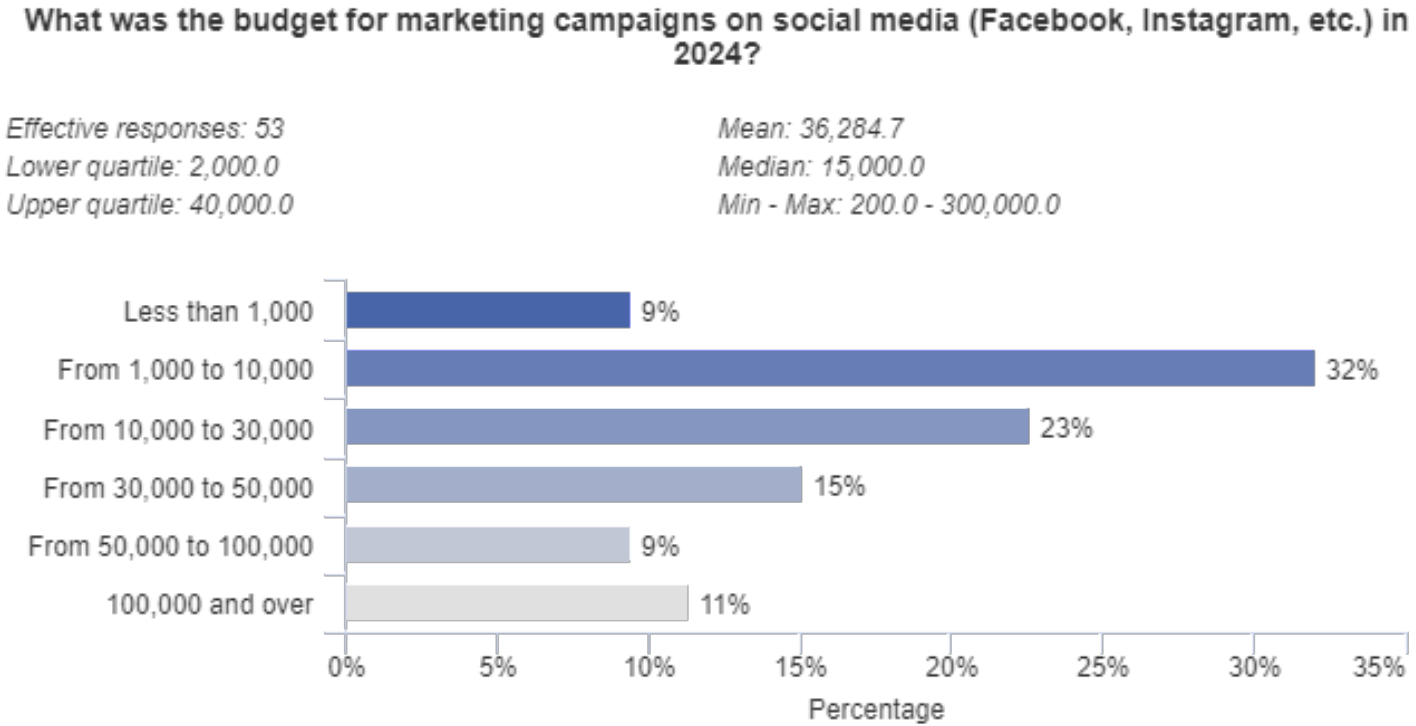
5. Budget for search engines in 2024 (in CHF)



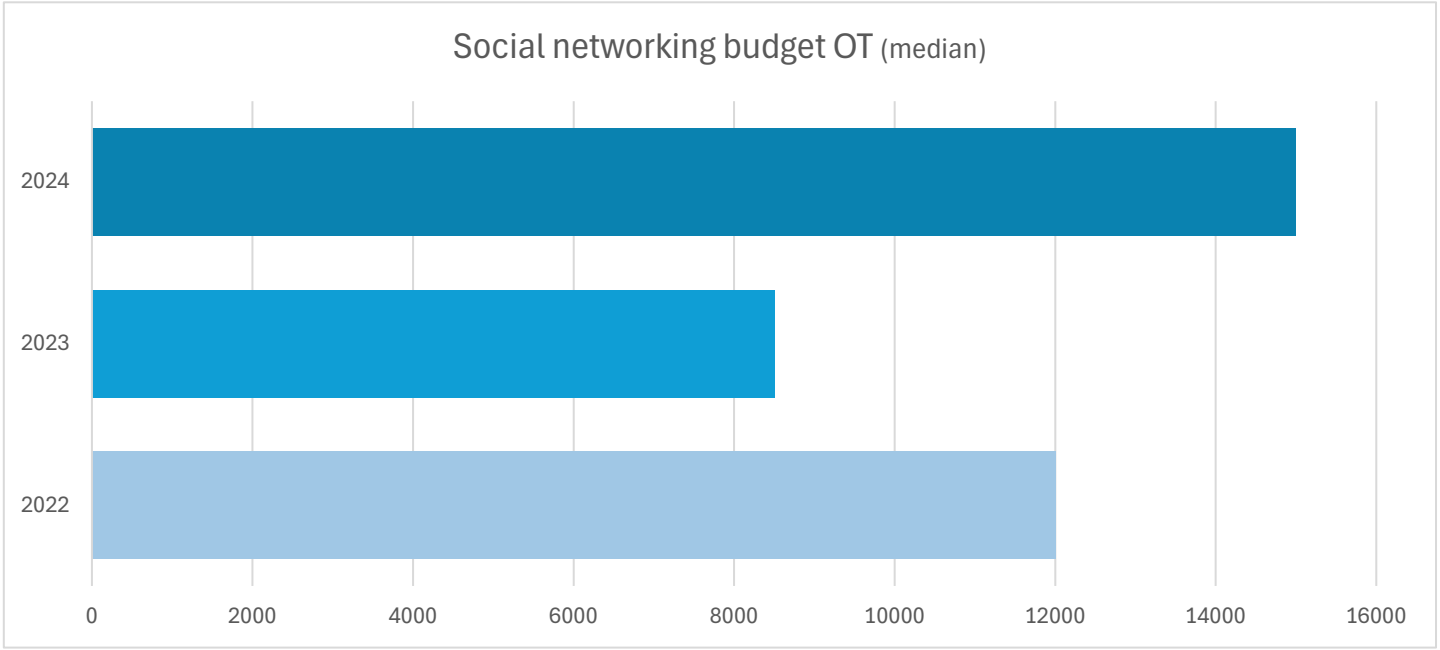
5. Budget trends for search engines 2022-2024 (in CHF)



5. Budget for social media campaigns in 2024 (in CHF)



5. Budget trends for social media campaigns 2022 - 2024 (in CHF)



5. Budget

The overall budgets of TOs vary widely, with a median of CHF 1.28 million and a higher average of CHF 3 million, reflecting an asymmetrical distribution dominated by large destinations. Almost 29% of organizations have a budget of between CHF 1 and 3 million, while 17% have less than CHF 100,000, highlighting a disparity between TOs of different sizes. Very large destinations, with budgets in excess of CHF 10 million, account for 12%, reflecting the substantial resources available to the sector's major players.

Budget allocated to search engines and social media

Search engine marketing (Google Ads, etc.) and social media (Facebook, Instagram) represent strategic budget items. The median expenditure for search engines is CHF 20,000, with investments concentrated between CHF 1,000 and CHF 50,000 (61%). For social media, the median is CHF 15,000, with 32% of TOs investing less than CHF 10,000, indicating a measured but essential allocation to these platforms. Larger destinations invest up to CHF 60,000, confirming their ability to mobilize greater resources.

5. Budget

Analysis by TO size

Large destinations (>1 million overnight stays) have an overall median budget of CHF 6.75 million, compared to just CHF 297,500 for small destinations. This translates into similar differences in marketing budgets: large destinations invest five times more in Google Ads and social media than small and very small structures. These differences demonstrate the importance of economies of scale and resources in attracting and engaging visitors via digital campaigns.

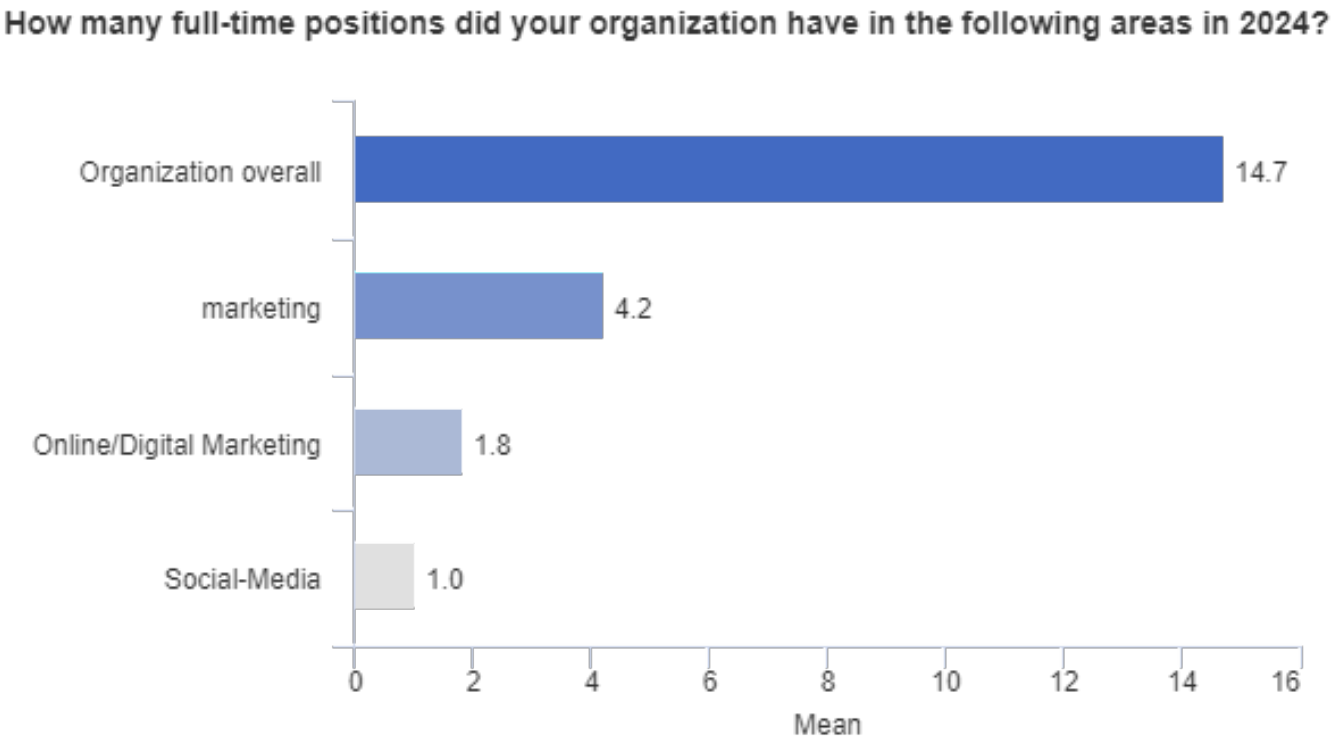
Conclusion

The budgets of Swiss TOs in 2024 reflect a strong heterogeneity, mainly linked to the size of the destinations. Larger structures devote significant resources to digital marketing, while smaller organizations, although more limited, maintain strategic investments to remain competitive. This underlines the critical role of financial resources in the ability to capture and retain visitors via digital channels.

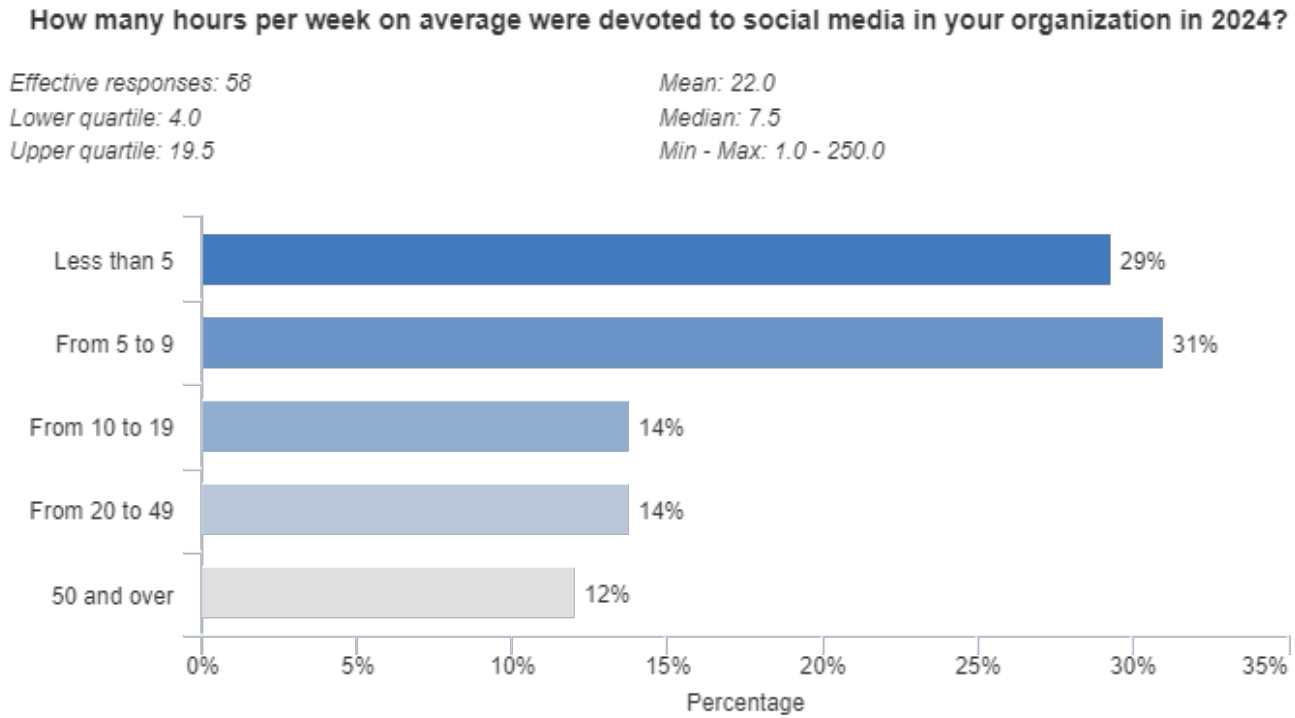
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6. Full-time jobs in marketing and social networking in 2024



6. Time spent on social media per week (in hours) in 2024



6. Time spent on social networks per week (in hours) by size of TO in 2024

Cross: Size of destination (number of overnight stays in hotels and para-hotels) / How many hours per week on average were devoted to social media in your organization in 2024?

SIZE OF DESTINATION (NUMBER OF OVERNIGHT STAYS IN HOTELS AND PARA-HOTELS)	HOW MANY HOURS PER WEEK ON AVERAGE WERE DEVOTED TO SOCIAL MEDIA IN YOUR ORGANIZATION IN 2024?	
	MEAN	MEDIAN
Large (>1 million overnight stays)	82.4	80.0
Medium (0.5-1 million overnight stays)	17.7	9.0
Small (0.1-0.5 million overnight stays)	8.6	6.5
Very small (less than 0.1 million overnight stays)	4.9	4.0
TOTAL	23.1	8.0

Elements significantly under mean *Elements significantly above mean*

The relationship is very significant. p-value= < 0.01 ; Fisher= 15.1.
Inter variance= 14,737.2. Intra variance= 975.3.

6. Time spent on social networks: comparison between 2017 and 2024 by TO size

- The number of hours spent on social networks is proportional to the size of the TO, and seems to have increased significantly among large TOs in 2024 compared to previous years.

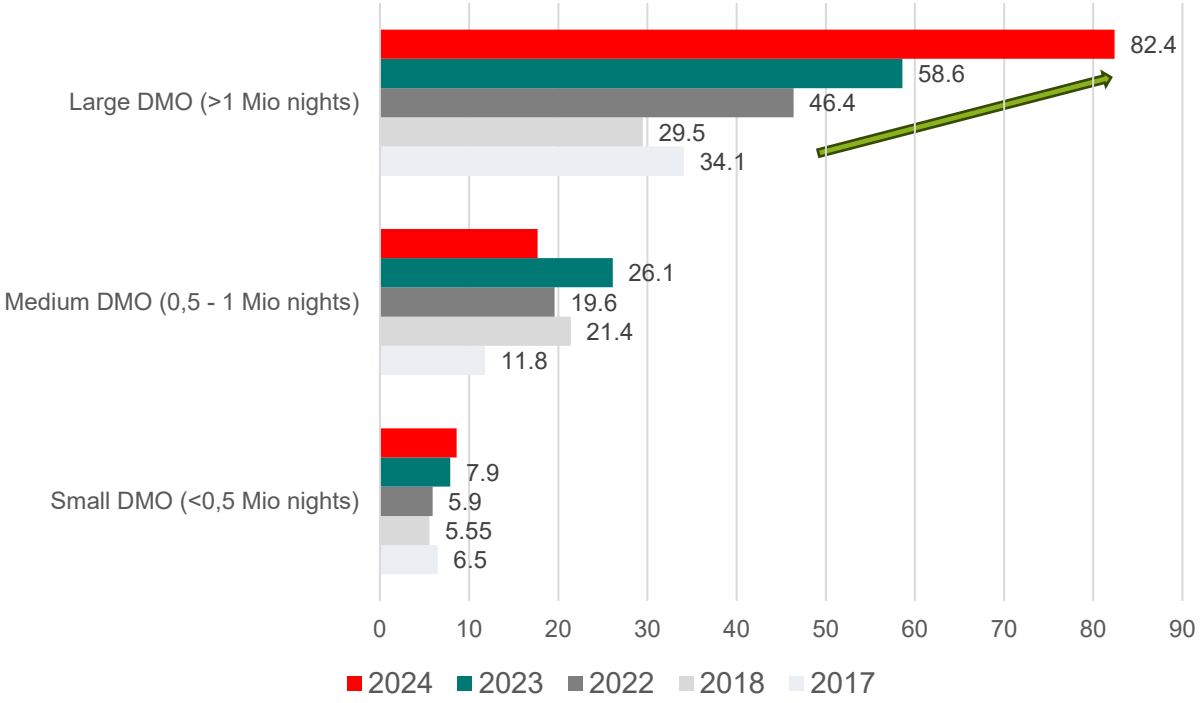


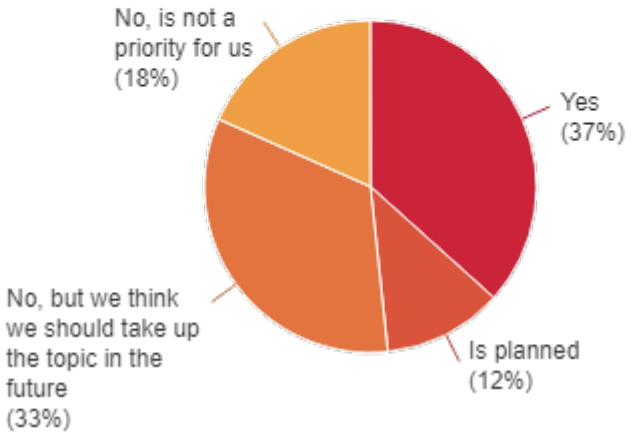
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7. Data strategy

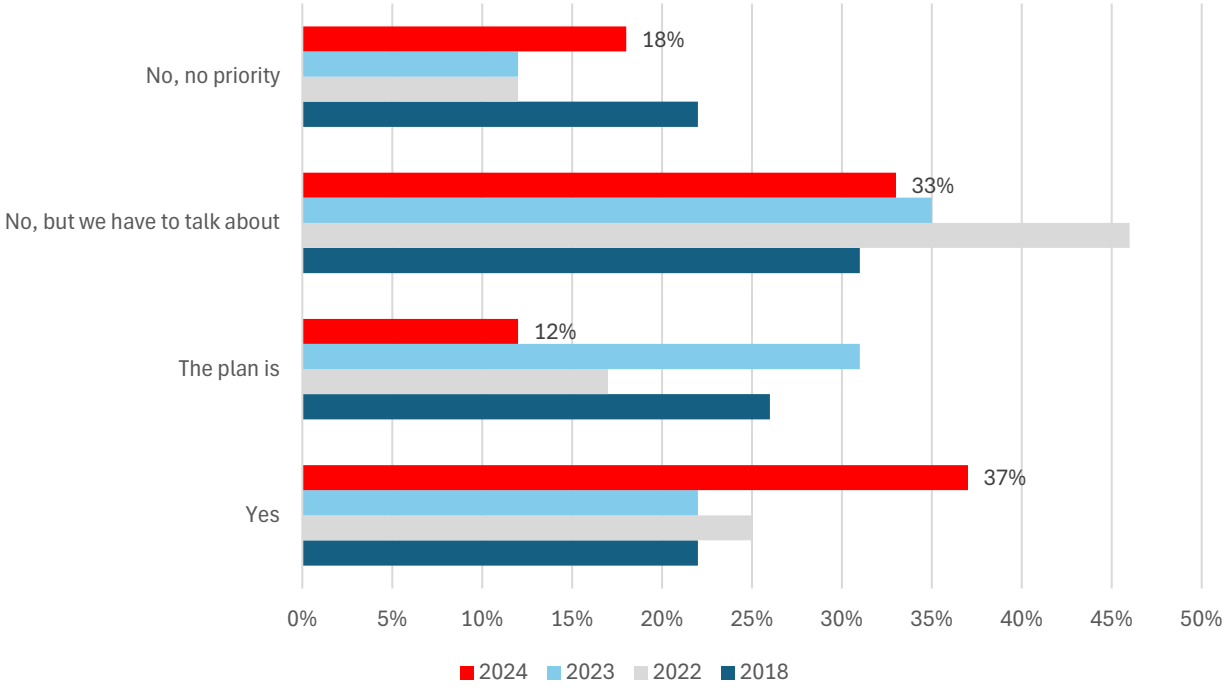
Does your organisation have a person or team dedicated to data analysis and strategy?

Effective responses: 60 *Response rate: 76%*



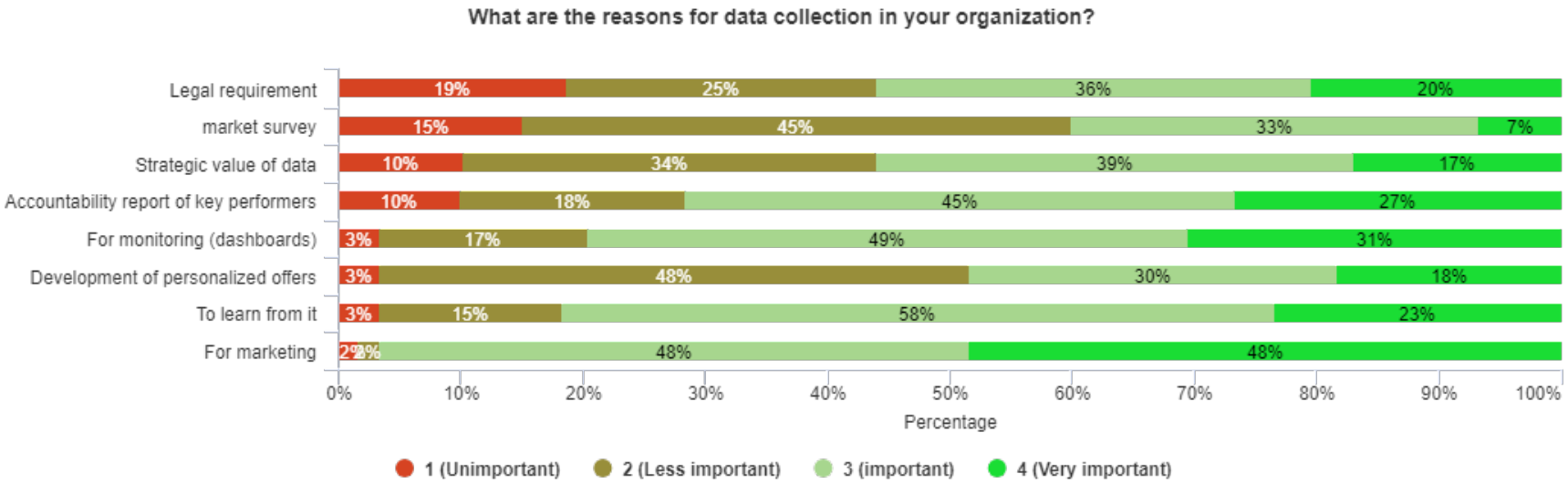
The results indicate a growing awareness of the importance of data, but also a potential lag in its effective strategic use.

7. Data strategy 2018-2024



Progress in adopting data strategies:In 2024, 37% of IOs claim to have a clear data strategy, marking a significant increase on 2018, when the figure was much lower. This reflects a growing awareness of the strategic importance of data in guiding decisions and improving performance.

7. Why TOs collect data



7. Why TOs collect data

Priority reasons

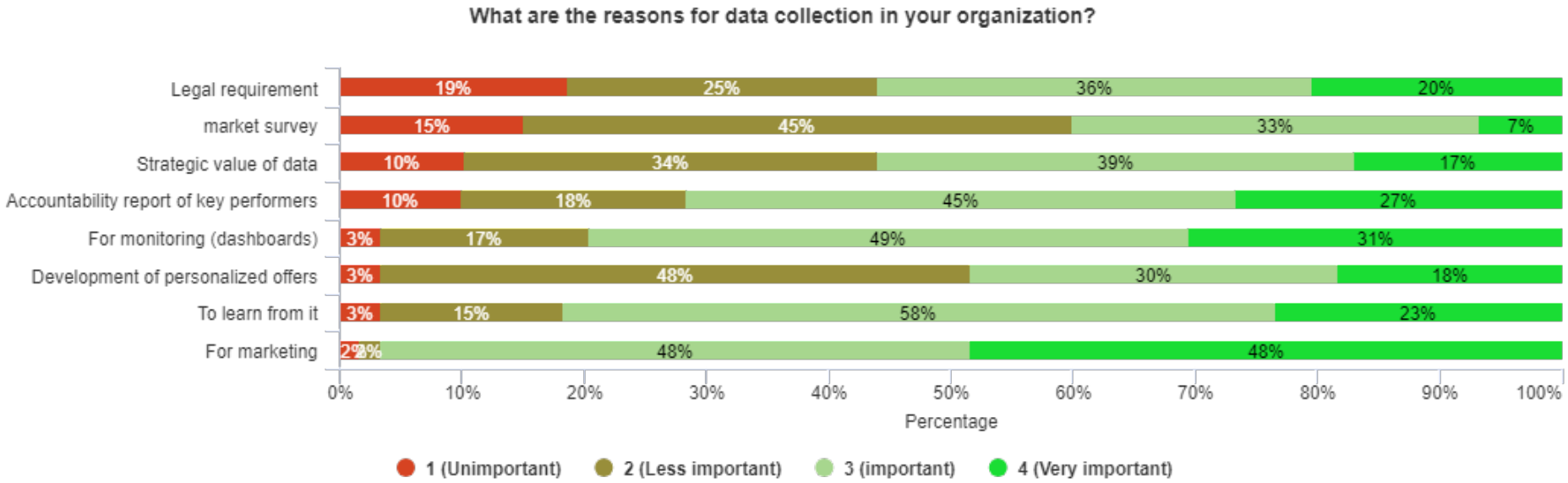
- **Marketing and personalization**: Marketing (71% combining important and very important) and the development of personalized offers (48% very important) are the main motivations. This underlines the importance of data to better target customers and tailor offers to specific needs.
- **Learning lessons and monitoring**: 81% and 80% of IOs respectively consider these uses to be important or very important, showing a willingness to use data to optimize performance and monitor market trends.

Secondary reasons

- **Strategic value and reporting**: 56% of TOs consider the strategic value of data to be important or very important, while 72% use data for business reporting, reflecting a performance evaluation approach.
- **Legal requirements and marketing research**: Although 20% consider legal requirements to be very important, this aspect remains less of a priority. Marketing research, on the other hand, is considered important by 52%, reflecting its usefulness for ad hoc analyses.

Conclusion: Swiss TOs use data primarily for marketing purposes, personalization of offers and strategic optimization. However, legal requirements and certain strategic analyses remain less valued, revealing opportunities to further expand the uses of data. This dynamic reflects a growing but uneven maturity in data management.

7. Obstacles to data use in 2024



7. Obstacles to data use

Major obstacles

- **Lack of human and financial resources**: Identified as important or very important by 78% of TOs, this factor represents a significant brake on the strategic use of data. The availability of resources remains a challenge for fully integrating data into current practices.
- **Legal requirements and data protection**: Nearly 74% of respondents consider this point to be important or very important, reflecting a growing concern with regulatory compliance and the management of sensitive data.
- **Lack of knowledge**: This is perceived as an obstacle by 56% of TOs, indicating a need for training and skills acquisition to exploit data effectively.

Secondary obstacles

- **Lack of organizational priority**: 43% of TOs feel that this is not a priority, which could limit investment in data-related projects.
- **Partner refusal to share**: 50% of TOs report difficulties in obtaining data from their partners, which limits the scope for collaborative analysis.
- **Operating and preparation costs**: The costs associated with operating and preparing data are considered important by around 54% of EOs, reflecting a significant financial barrier.

7. Obstacles to data use

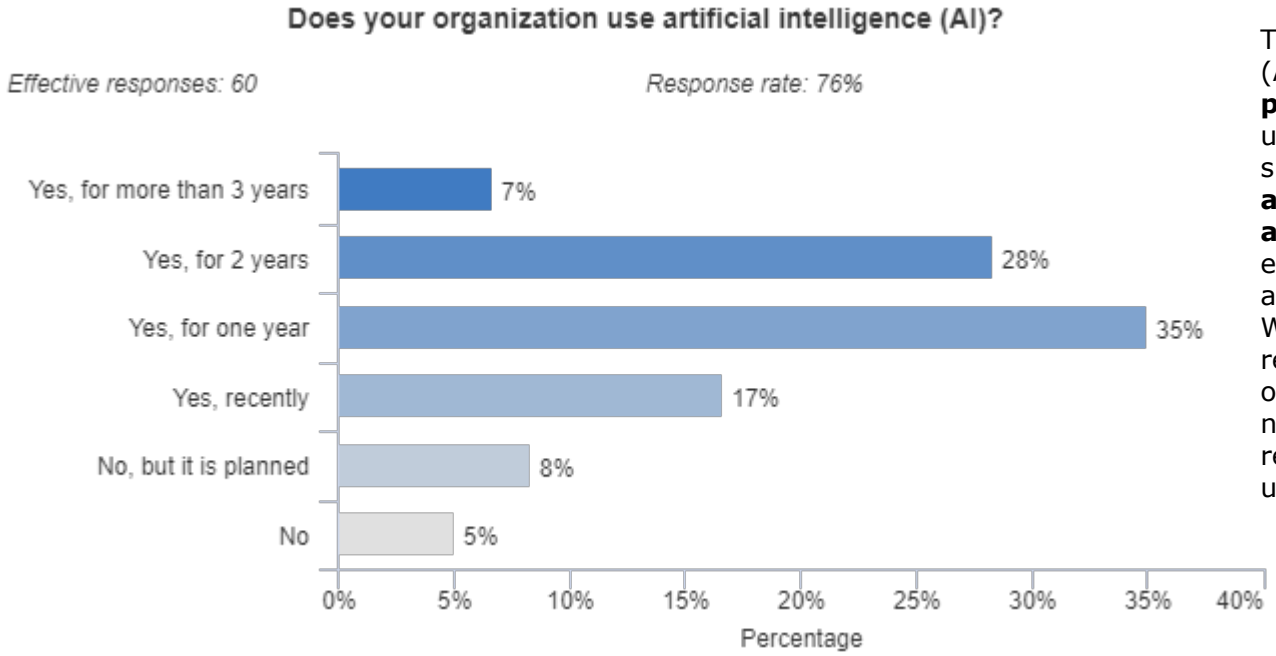
Conclusion

These results show that Swiss TOs face structural and financial challenges in integrating data into their strategies. Strengthening internal skills, optimizing resources and facilitating data sharing between partners could help overcome these obstacles, enabling a more strategic and collaborative use of data.

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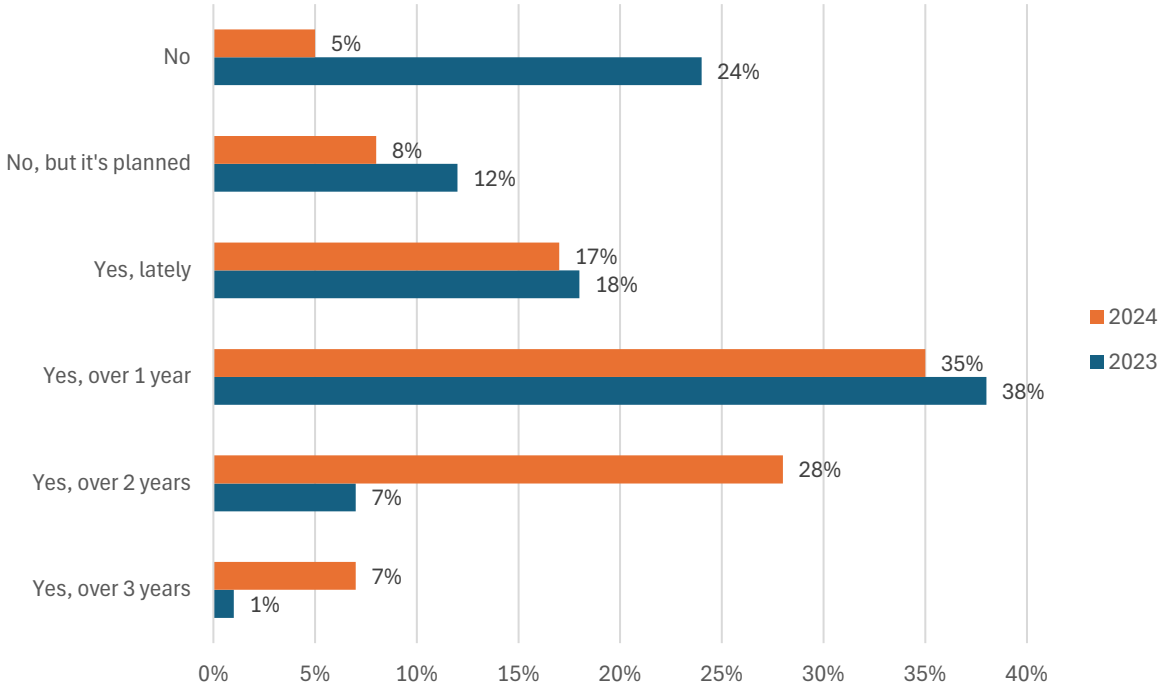
1. Managerial summary
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8. Artificial Intelligence (AI)
9. Comparison with international DMO data
10. Contact and Questionnaire

8. Artificial intelligence (AI): Use



The adoption of artificial intelligence (AI) in tourist offices is in its **initial phase**: 35% of offices have been using it for a year and 17% for a short time, indicating a **significant and recent movement towards** AI **adoption.** 28% have two years' experience, suggesting a growing adoption (+21% compared to 2023). With 8% planning its use, there is a recognition of the future importance of AI. However, 5% of offices are not using it, which may reflect resource constraints or a lack of understanding of AI.

8. Artificial intelligence (AI): evolution 2024 vs 2023



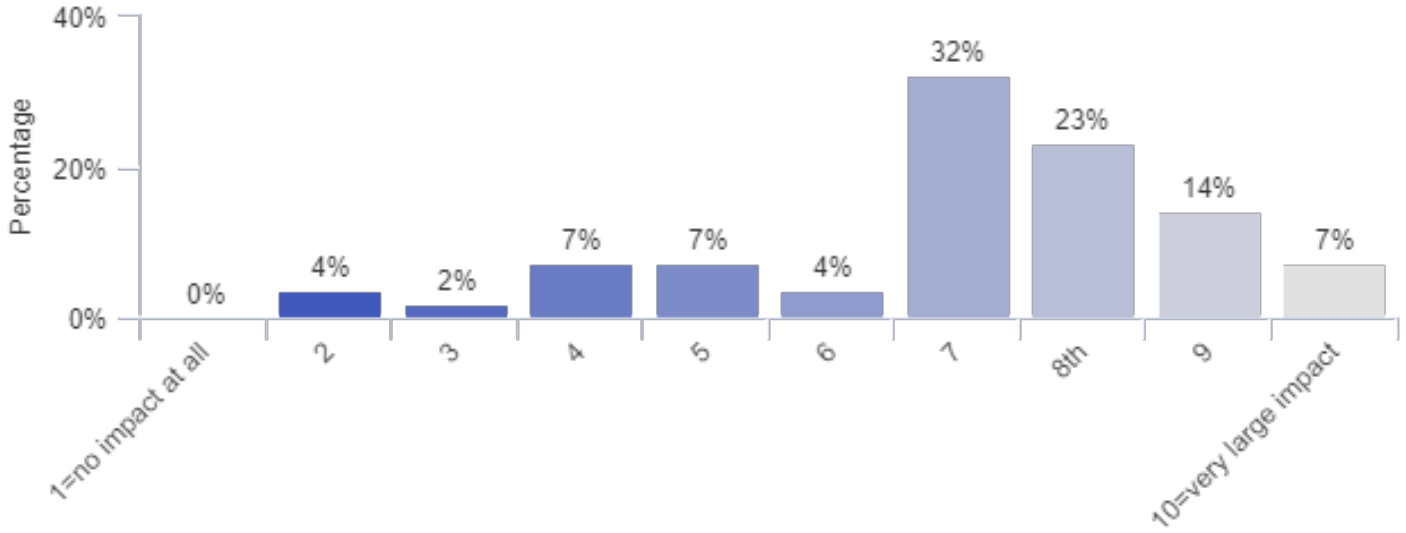
8. Artificial Intelligence (AI): The perceived (potential) impact

On a scale of 1 to 10, how would you rate the impact of using AI for tourism organizations?

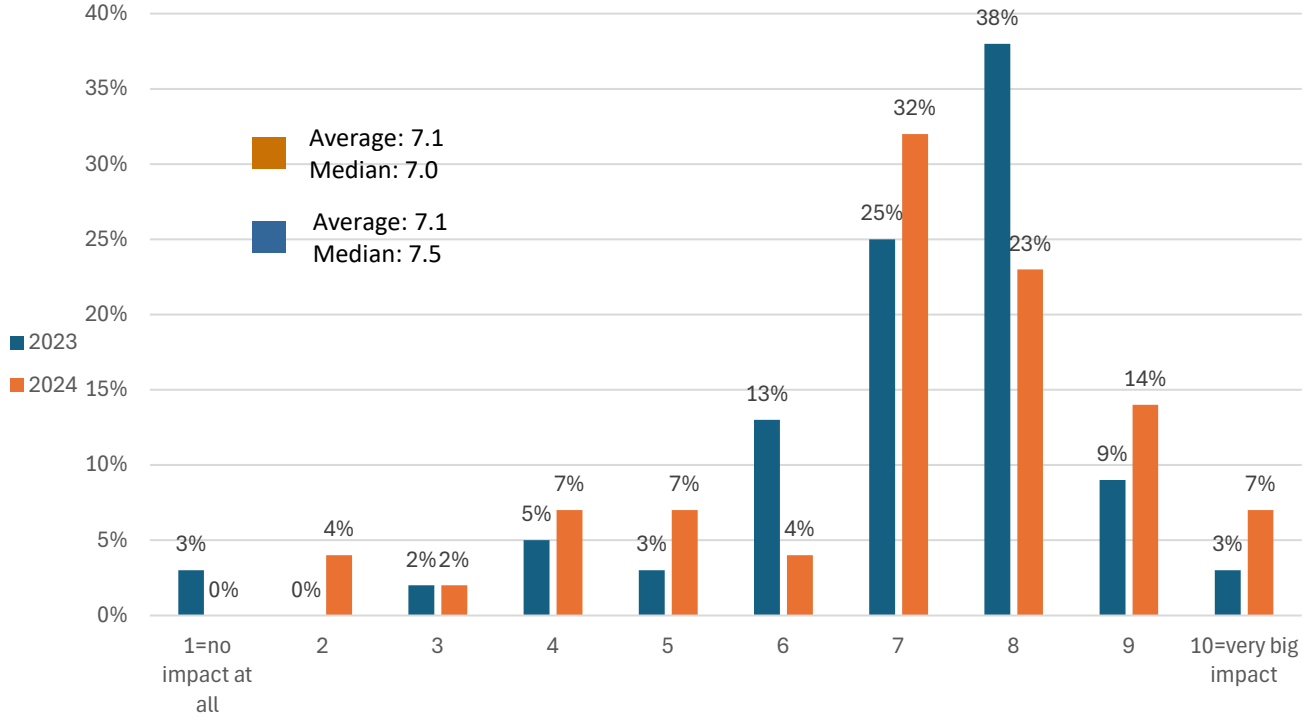
Effective responses: 56

Mean: 7.1

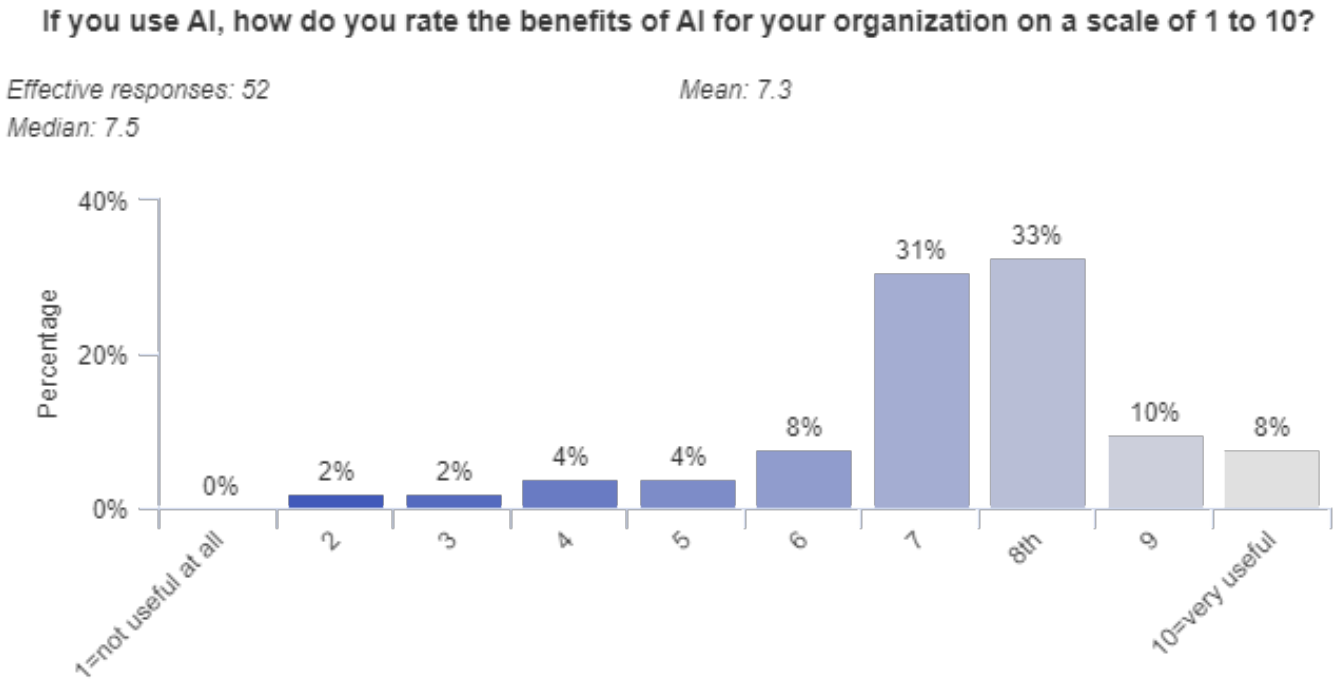
Median: 7.0



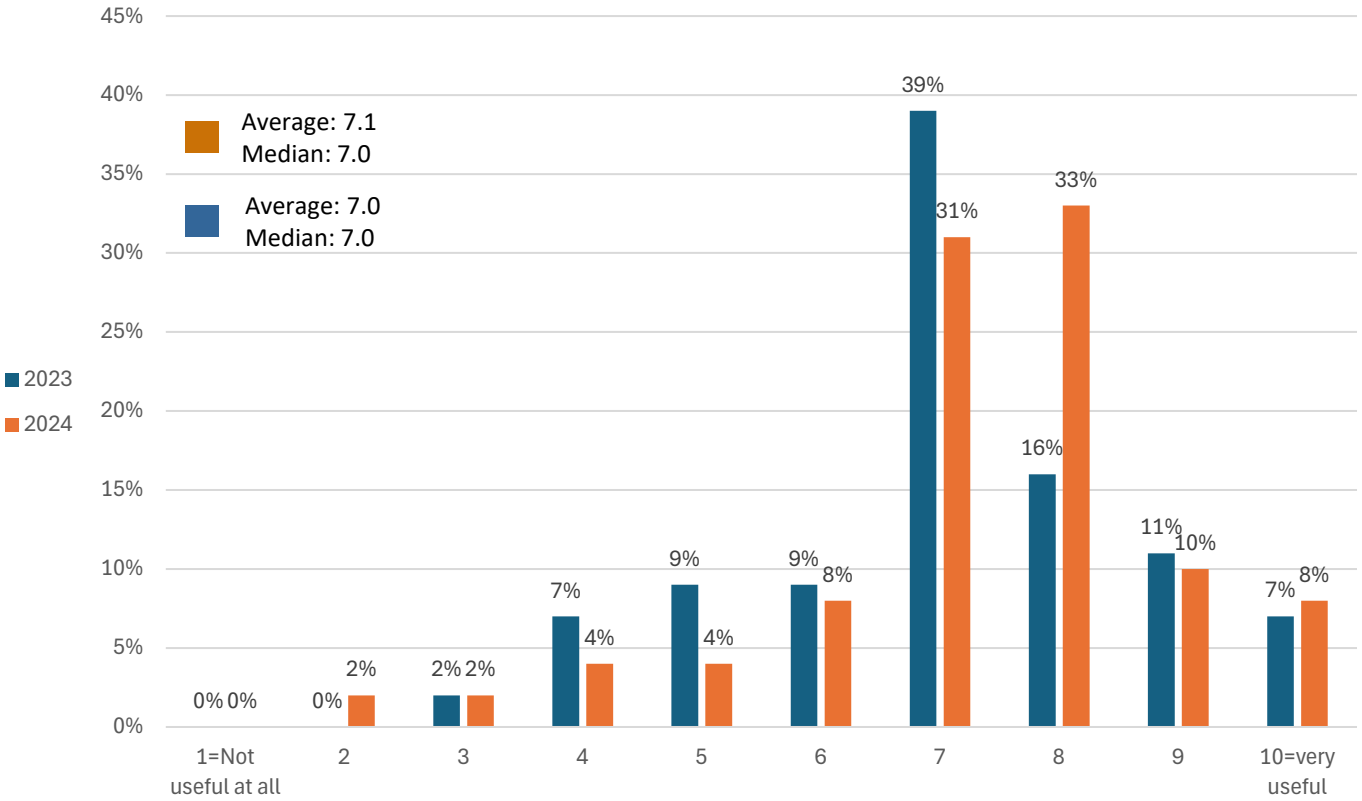
8. Artificial intelligence (AI): Perceived (potential) impact (2023 vs 2024)

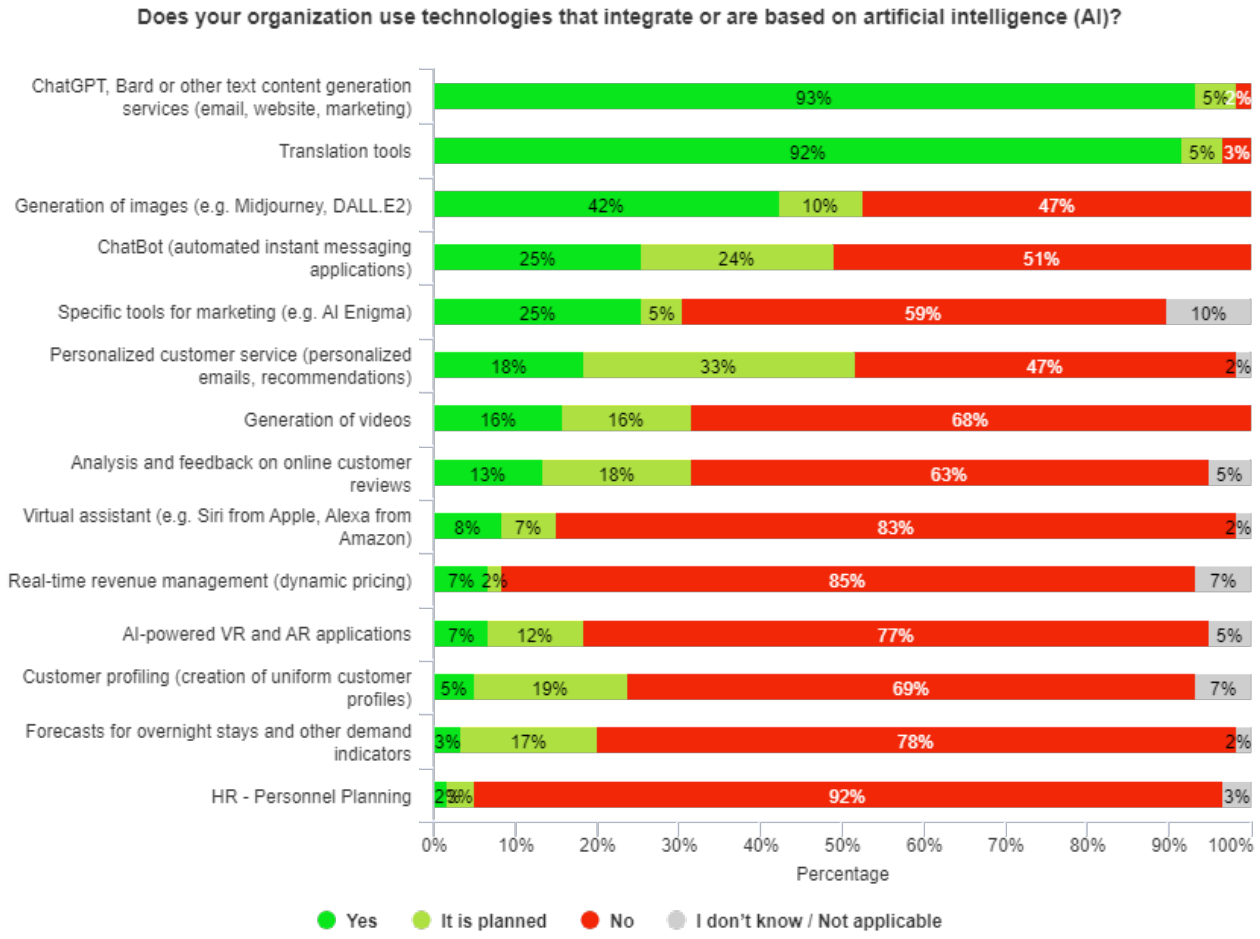


8. Artificial Intelligence (AI): Perceived usefulness today



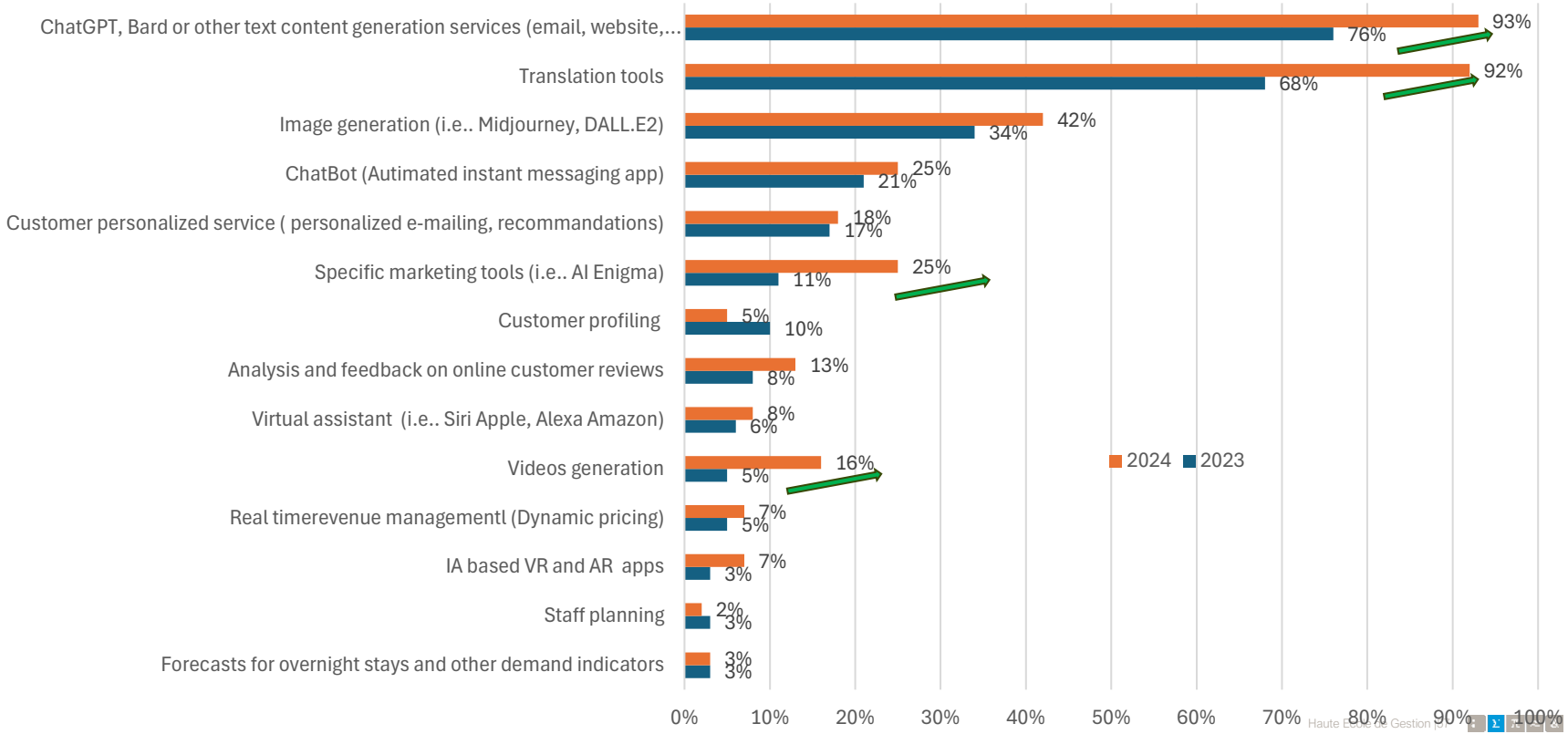
8. Artificial intelligence (AI): Perceived usefulness today (2023 vs. 2024)





8. Artificial intelligence (AI): Technologies used

8. Artificial intelligence (AI): progression of technologies used 2024 vs. 2023



8. Artificial intelligence (AI): Technologies used

The results show a heterogeneous adoption of technologies integrating or based on artificial intelligence (AI) by Tourist Offices (TOs) in 2024, with significant differences depending on use:

Widely used technologies :

1. **Text generation (ChatGPT, Bard)**: 93% of EOs say they use these tools, showing massive adoption for content creation, web communications, and marketing.
2. **Translation tools**: with 92% adoption, they are essential for IOs operating in a multilingual context.

Technologies under development :

1. **Image generation (Midjourney, DALL-E 2)**: Adopted by 42% of TOs, with 10% planning to integrate them, these tools are gaining in popularity for the creation of visual media.
2. **Chatbots**: Used by 25% of IOs and planned by 24%, they are beginning to be integrated to improve customer service and automate interactions.
3. **Specific marketing tools**: Mentioned by 25% of TOs as already in use, with considerable room for improvement (forecasts at 59%).

8. Artificial intelligence (AI): Technologies used

Less common technologies :

1. **Analysis of online customer reviews**: Used by only 13%, this technology represents untapped potential for understanding and responding to customer needs.
2. **Virtual and augmented reality (VR/AR) applications**: 12% adoption, with a low integration forecast (7%), despite their ability to enrich the customer experience.
3. **Real-time revenue management (dynamic pricing)** and **customer profiling**: These advanced technologies are used by 7% and 5% of IOs respectively, highlighting challenges in their adoption.

Marginal or little considered technologies :

1. **Forecasting overnight stays and demand indicators**: Only 3% of TOs use these tools, despite their strategic importance.
2. **Staff scheduling via AI**: Largely ignored, with adoption limited to 2%.

8. Artificial intelligence (AI): Technologies used

Change between 2023 and 2024

The adoption of artificial intelligence (AI) technologies increased significantly between 2023 and 2024 in Tourist Offices (TOs). **Text-based content generation** tools (ChatGPT, Bard) saw a sharp increase from **76% to 93%**, confirming their key role in automating communications and marketing. Similarly, **translation tools** rose from **68% to 92%**, underlining the growing importance of multilingual management in the international tourism sector.

Some more specialized tools are also recording growing adoption, such as **image generation** (34% to 42%), **AI-based marketing tools** (11% to 25%) and **video generation** (5% to 16%). These developments show a diversification of AI uses beyond simple text production, towards more interactive and visual formats.

However, other technologies, such as **dynamic pricing**, **virtual assistants** and **overnight stay forecasts**, are still under-utilized, suggesting potential for future expansion.

8. Artificial intelligence (AI): Technologies used

Conclusion

Swiss IoTs show strong adoption of AI technologies for creative and basic tasks, such as text generation and translation. However, analytical and strategic technologies, such as dynamic pricing, customer profiling or virtual reality, remain under-exploited, reflecting technical, financial or organizational challenges. This points to significant potential for extending the use of AI to more complex, high value-added areas.

The overall progress between 2023 and 2024 reflects a broader integration of AI into IoT practices, although its adoption is still limited for certain advanced applications. The key challenge remains to support this rise in competence and explore strategic uses that could bring sustainable competitive advantage.

8. Artificial intelligence (AI): Other technologies used (open comments)

The artificial intelligence tools mentioned are used in a variety of functions by tourist offices. **Artificial intelligence (AI) tools** used by Tourist Offices (TOs) highlight a variety of applications, from **text generation** to advanced analytical tools. Here is a structured overview of the main tools cited:

Content and text generation

1. **ChatGPT**: Most often mentioned, used to create content, generate texts, presentations, summaries and syntheses.
2. **Claude.ai**: Another tool for content generation and structuring.
3. **Jasper**: Specialized in content marketing and text creation.

Multimedia and creative tools

1. **Canva** and **Instories**: For the creation of visual and marketing materials.
2. **Adobe Suite (KI)**: Includes AI features for content editing and graphic design.

Analytical and structured tools

1. **Power BI**: For data analysis and visualization.
2. **Deepseek, Hyll, Copilot**: Used to analyze data and optimize internal processes.
3. **Hugging Face, Llama Index**: Specialized tools for conversational AI and natural language processing.

8. Artificial intelligence (AI): Other technologies used (open comments)

Specialized applications

1. **Hubspot**: Used for customer relationship management (CRM) and marketing campaigns.
2. **Adobe AI editing capabilities**: Used to integrate AI into structured databases, such as destination.data

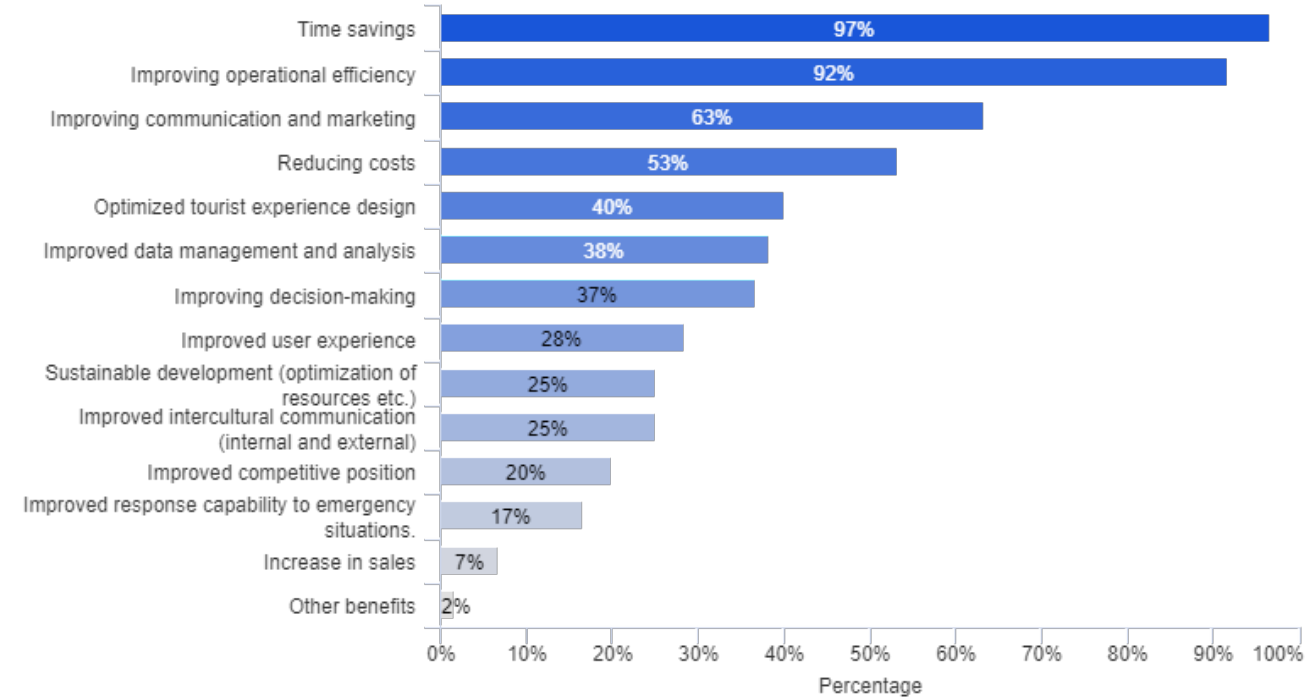
Analysis

These tools testify to a growing adoption of AI in the tourism sector, with a strong focus on content creation and data analysis. It also shows a trend towards versatile solutions combining creative and analytical tools to meet the varied needs of TOs.

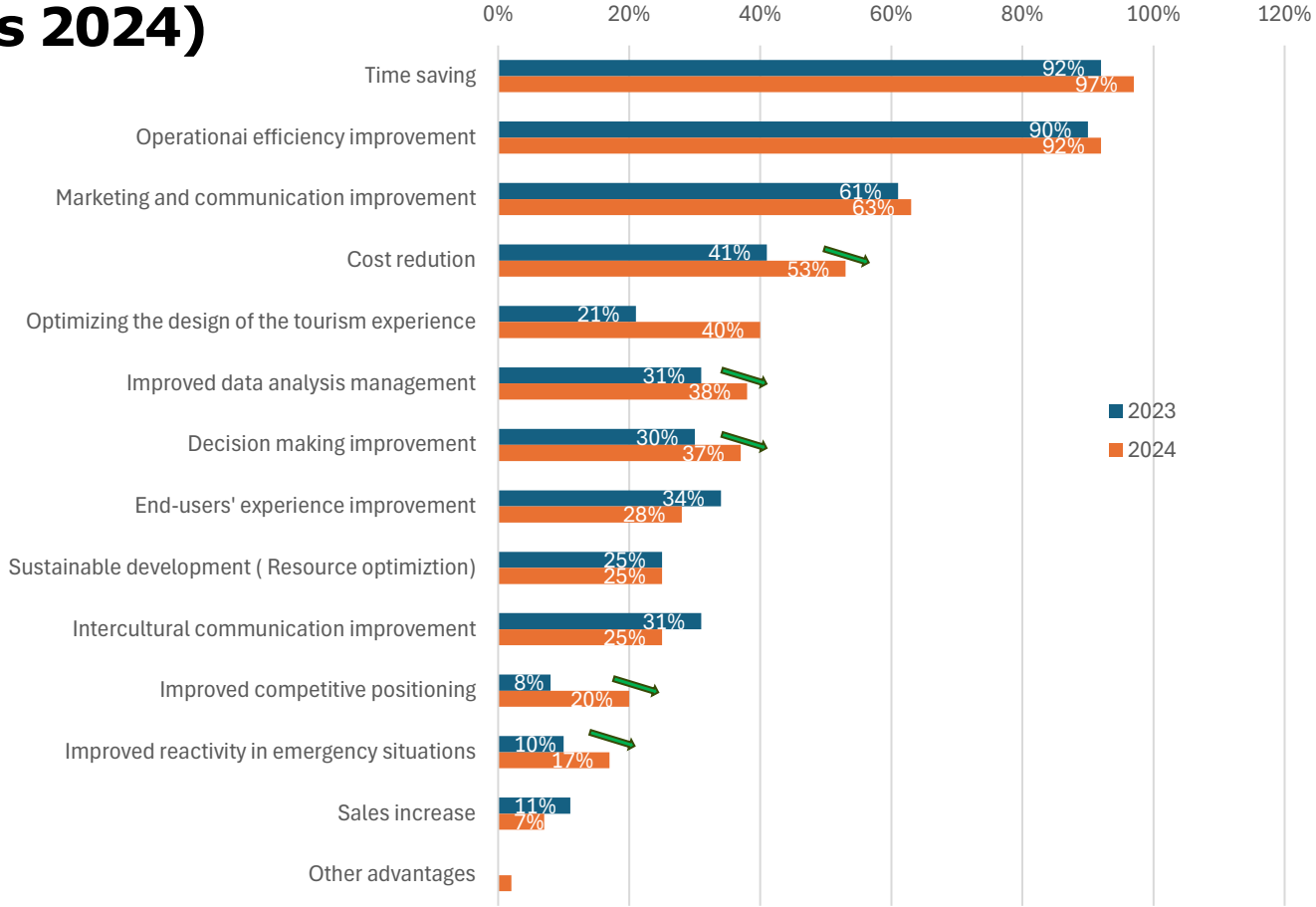
8. Artificial intelligence (AI): Benefits

What are the experienced or perceived benefits of introducing these technologies for a tourism organization? (Multiple answers possible)

Effective responses: 60 *Response rate: 76%*



8. Artificial intelligence (AI): Advantages (2023 vs 2024)



8. Artificial intelligence (AI): Benefits

Key benefits

- **Time savings** (97%): Almost unanimously recognized as the major benefit, AI enables repetitive tasks to be automated and reduces the time spent on certain operations.
- **Improved operational efficiency** (92%): AI is seen as an important lever for streamlining internal processes and optimizing productivity.
- **Improved communication and marketing** (63%): These technologies strengthen EOs' ability to produce personalized content and interact effectively with their audiences.

Secondary benefits

- **Cost reduction** (53%): Although less dominant, the economic impact is significant thanks to automation and resource optimization.
- **Optimizing the tourism experience** (40%): AI helps personalize offers and design experiences tailored to visitors' expectations.
- **Data analysis and decision-making** (38% and 37%): These technologies facilitate the exploitation of data and support more informed strategic decisions.

8. Artificial intelligence (AI): Benefits

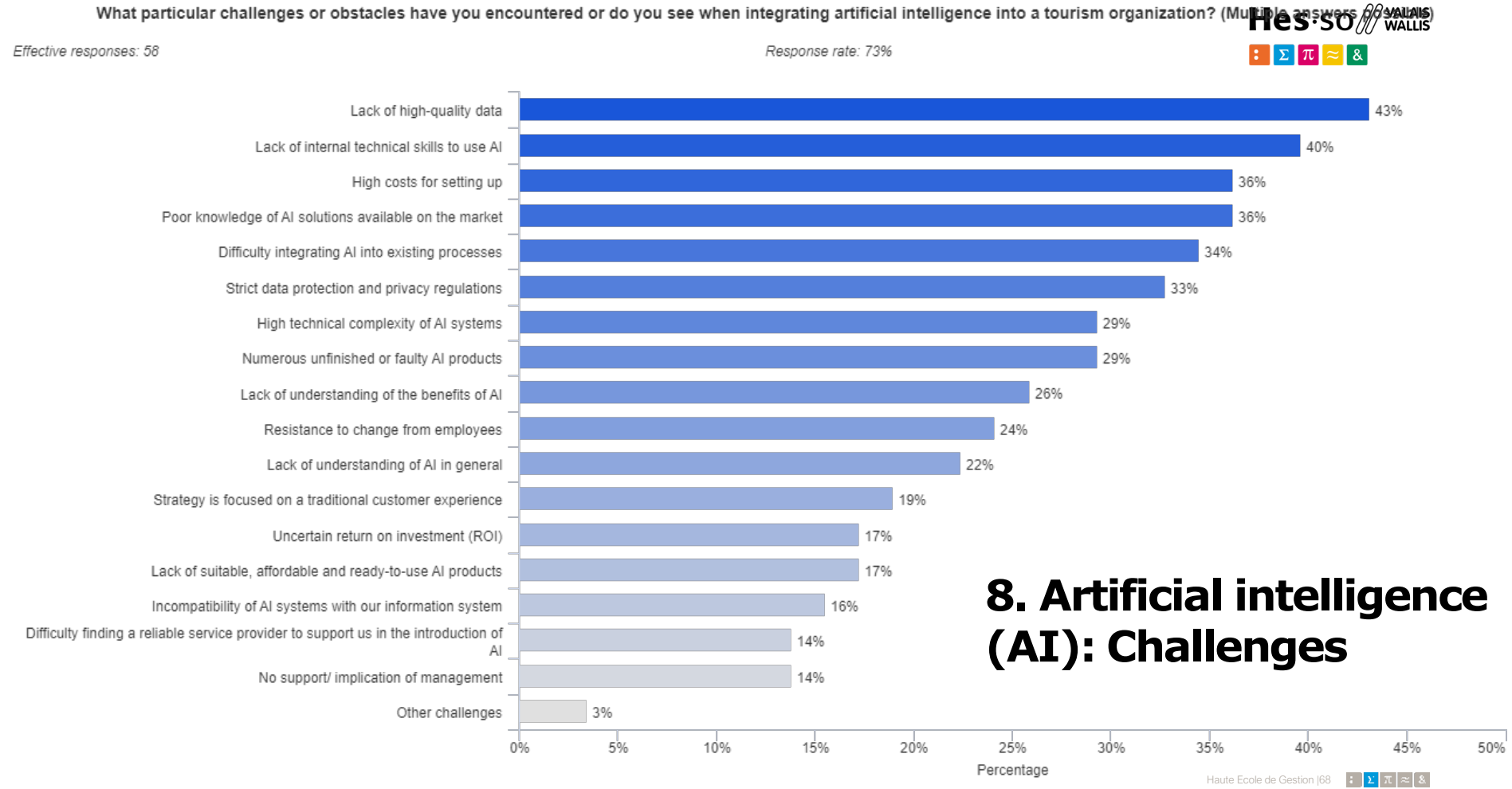
Less frequent benefits

- **Sustainability and resource optimization** (25%): AI contributes to more sustainable practices by optimizing the use of resources.
- **Improved competitive positioning** (20%): A TO using AI can better differentiate itself from the competition.
- **Reactivity in emergency situations** (17%) and **increased sales** (7%): These aspects are still marginal in current use.

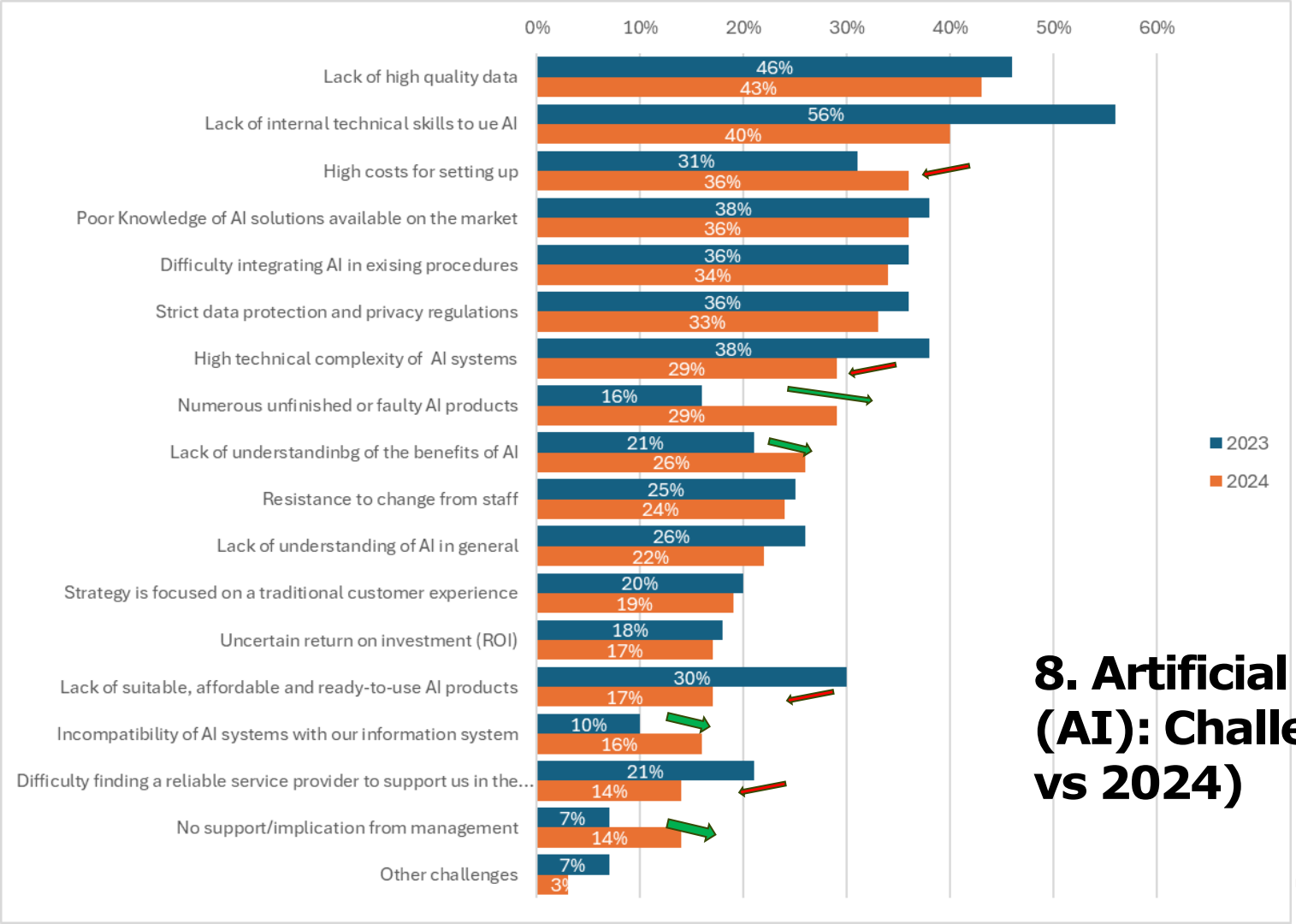
Evolution 2023 to 2024

AI is perceived as a key lever for time savings (97% vs. 92% in 2023) and operational efficiency (92% vs. 90%), confirming its role in process optimization and communication (63% vs. 61%). Cost reduction (53% vs. 41%) and optimizing the tourism experience (40% vs. 21%) show a more strategic adoption of data and AI tools. Notable advances appear in data management (38% vs. 31%) and competitive positioning (20% vs. 8%), indicating a growing awareness of AI as a competitive and decision-making asset, beyond automation.

Conclusion: IoTs overwhelmingly recognize AI as a tool for productivity and operational efficiency, with clear impacts on communication and marketing. However, opportunities remain to further leverage competitive advantage, sustainability, and crisis management through these technologies.



8. Artificial intelligence (AI): Challenges



8. Artificial Intelligence (AI): Challenges (2023 vs 2024)

8. Artificial intelligence (AI): Challenges

Main challenges

- **Lack of quality data** (43%): The lack of reliable, actionable data is perceived as the main impediment to the effective use of AI, limiting its application potential.
- **Lack of in-house technical skills** (40%): The need for specialized skills is a major obstacle, highlighting the importance of training staff or hiring AI experts.
- **High cost of implementation** (36%): The initial investment to adopt AI solutions is a significant brake, especially for smaller IoTs.
- **Lack of knowledge of available solutions** (36%): Lack of knowledge of the tools and technologies available on the market complicates choice and implementation.

Operational and technical challenges

- **Integration into existing processes** (34%): The difficulty of adapting AI to systems already in place is a frequent obstacle.
- **Strict data protection regulations** (33%): Legal constraints on privacy complicate the use of AI.
- **Technical complexity of systems** (29%): AI solutions are perceived as too complex to understand and deploy.
- **Unfinished or defective products** (29%): The immaturity of some available AI solutions limits their adoption.

8. Artificial intelligence (AI): Challenges

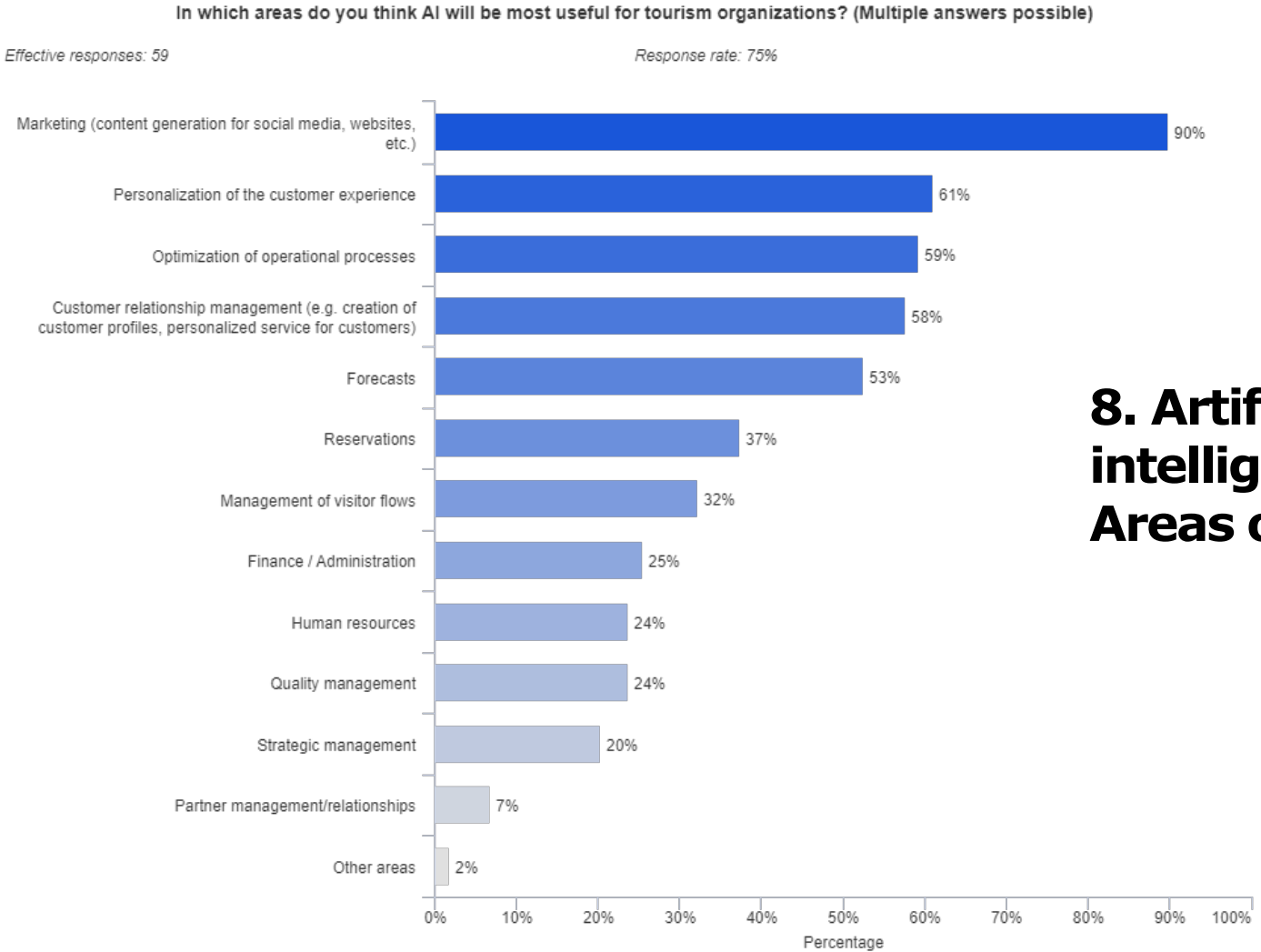
Human and organizational factors

- **Lack of understanding of the benefits of AI** (26%): Insufficient awareness hinders team commitment.
- **Resistance to change** (24%): Some employees are reluctant to adopt new technologies.
- **Uncertain return on investment** (17%): Doubts about profitability are holding back implementation.

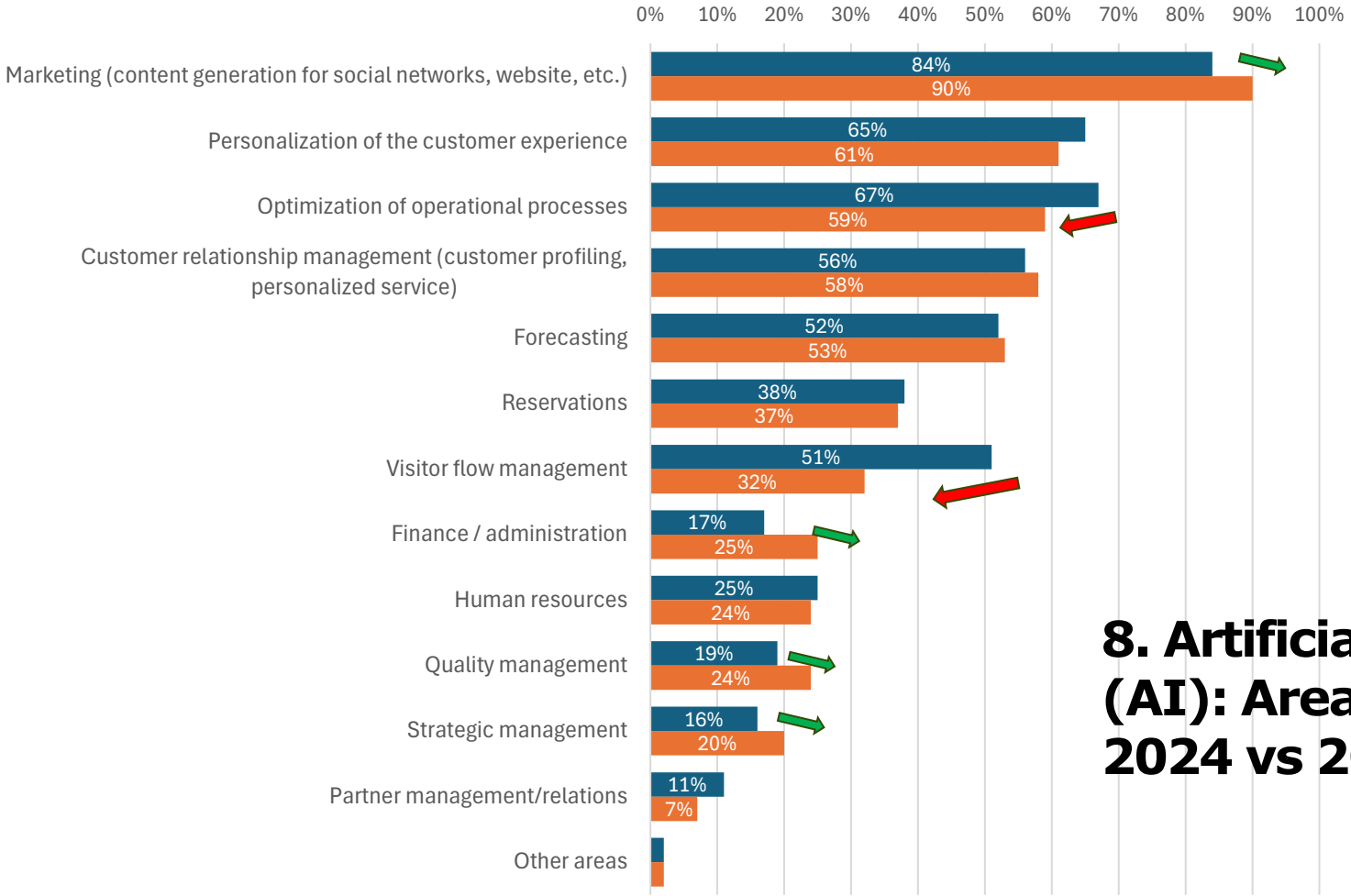
Evolution 2023 to 2024

An analysis of the challenges shows contrasting trends. The lack of in-house technical skills has fallen sharply, indicating a gradual improvement in internal capabilities. The lack of quality data, although down slightly, remains the main obstacle to effective adoption. Overall, although in-house skills are improving, integration challenges, solution maturity and cost-effectiveness remain major obstacles to be overcome.

Conclusion: The challenges associated with AI adoption in IoT combine technical (data quality, system complexity), organizational (internal skills, process integration) and financial (high cost, uncertain ROI) obstacles. These findings underline the need for better training, financial support and increased awareness of the potential benefits and applications of AI.



8. Artificial intelligence (AI): Areas of use



8. Artificial intelligence (AI): Areas of use 2024 vs 2023

8. Artificial intelligence (AI): Areas of use

Artificial intelligence (AI) is widely adopted by Tourist Offices (TOs) for areas such as **marketing** (90%), where it is mainly used for content generation on social networks and websites. This adoption demonstrates the strategic importance of AI in **communication and promotional activities**, enabling audiences to be better targeted and destinations to be more visible. In addition**, personalizing the customer experience** (61%) and **optimizing operational processes** (59%) are among the major applications, highlighting AI's ability to improve visitor satisfaction while streamlining internal tasks.

Despite these successes, **some areas of use remain less explored**, such as tourism flow management (32%), which seems to convince fewer users than in 2023 (-19%), human resources (24%) and quality management (24%). These results show that while AI is mainly used for functions linked to communication and customer relations, its **potential in more complex applications**, such as strategic management (20%) or forecasting (37%), **remains under-exploited**. AI could also be further integrated to optimize key aspects such as planning, decision-making and resource allocation.

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9. Comparison with international DMO data

Sojern's recently published "State of Destination Marketing 2025" report is based on data from nearly **200 destination marketing organizations (DMOs) worldwide**. The global findings show similarities with the results of our study.

Digital marketing: the main objectives sought are, in order of importance: brand (destination) **awareness**, **customer/content engagement** and **increased website traffic.**

Data usage: the main obstacles to using data are the **cost of acquiring and preparing data**, the **lack of quality data** and the **lack of knowledge** to interpret it.

Use of AI: AI is mainly used **for content creation**, chatbots, customer interaction and profiling.

9. Comparison with international DMO data
Other global trends

- **Increased investment in digital advertising**: **85% of DMOs** maintained or increased their digital advertising budgets compared to the previous year.
- **Challenges in measuring success**: **54% of DMOs** struggle to clearly demonstrate the return on investment (ROI) of their campaigns.
- **Use of artificial intelligence**: **63% of DMOs** use AI for content creation, but only 28% for data analysis, indicating untapped potential.
- **Year-round marketing strategies**: **52% of DMOs** now prefer “always-on” campaigns to traditional seasonal approaches.
- **Predominance of social media**: **91% of DMOs** use social media marketing, with **Facebook and Instagram** among the most widely used channels, as in Switzerland.

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HAUTE ECOLE DE GESTION

10. Further information and contact:



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Bachelor of Science HES-SO in Tourism (in German, French or English)

https://www.hevs.ch/fr/hautes-ecoles/haute-ecole-de-gestion/tourisme/

10. Resilient Tourism Flagship

Flagship supported by

Schweizerische Eidgenossenschaft
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RESILIENT TOURISM

This Resilient Tourism Flagship has been designed by six research institutions in partnership with more than 30 Swiss travel stakeholders.

HSLU Hochschule Luzern

University of St.Gallen

Hes·so VALAIS WALLIS

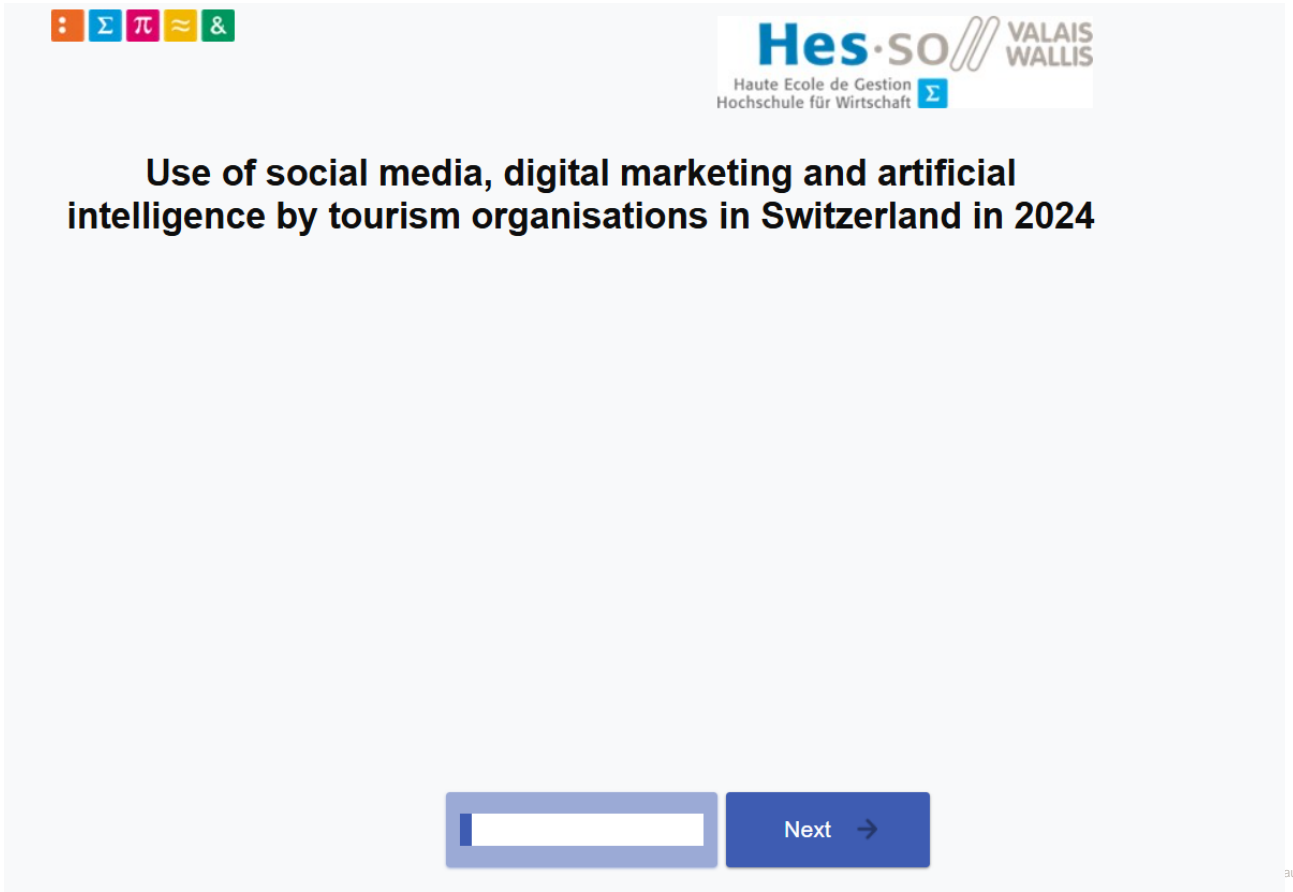
icare RESEARCH

EHL

FH GR Fachhochschule Graubünden University of Applied Sciences

Website: https://www.resilienttourism.ch/fr
LinkedIn: https://www.linkedin.com/company/swiss-travel-tourism-data-driven-transformation-flagship-resilient-tourism

10. Questionnaire



10. Questionnaire

The digital age is bringing fundamental changes to our practices and strategies in the tourism sector. Today, the rise of **mobile internet** and **social media** are changing the fundamentals of tourism marketing. This development is further reinforced by the growing importance of data as a key resource, especially for industry giants such as Google and Facebook. In addition, the development of technologies such as **ChatGPT** promises accelerated development in this area.

Since 2015, HES-SO Valais-Wallis has been conducting annual surveys among tourism organizations in Switzerland to collect valuable data on social media usage, investments in online marketing and data management. These studies have provided invaluable insights into the development of the industry.

Today we are pleased to launch a new phase of this series of investigations. Our current study aims not only to update this essential data but also to explore a new field: the **impact and integration of artificial intelligence (AI)** into the strategies and operations of tourism organizations.

Your participation in this study is crucial. It enables us to develop a deeper understanding of how AI is transforming our industry and to jointly define the best practices for the future of digital tourism. We thank you in advance for your valuable contribution to this study.

Dr. Roland Schegg (roland.schegg@hevs.ch), Institute of Tourism, University of Applied Sciences Western Switzerland Valais (HES-SO Valais-Wallis), Sierre

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10. Questionnaire

Social-Media

On which social media/platforms is your organization actively present?

- [ ] Facebook
- [ ] Flickr
- [ ] Google reviews (e.g. from the Tourist Office)
- [ ] Instagram
- [ ] Line
- [ ] LinkedIn
- [ ] Pinterest
- [ ] Qzone
- [ ] Racing
- [ ] Sina Weibo
- [ ] Snapchat
- [ ] TikTok
- [ ] TripAdvisor
- [ ] Tumblr
- [ ] Twitter
- [ ] WeChat
- [ ] Whatsapp for COMPANIES
- [ ] Yelp
- [ ] Youtube
- [ ] LinkedIn1
- [ ] Other

Number of visitors to the website in 2024 (Unique Website Visitors)

What percentage of these website visitors were generated through social media in 2024?

%

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10. Questionnaire

What goals do you pursue with social media?

- [ ] Increase awareness of the destination (brand awareness)
- [ ] Market products and offers
- [ ] Increase engagement/interaction with customers (brand engagement)
- [ ] Generate customer insight (e.g. get to know the needs of guests/potential guests, knowledge of customer profiles)
- [ ] Active use as a feedback channel (improving quality)
- [ ] Active use as a service channel
- [ ] Generate website traffic
- [ ] Other destinations

How often do you check your results (engagement, growth, click-throughs, etc.) on social media?

- ◯ Once daily
- ◯ Several times a week
- ◯ Once a week
- ◯ Several times a month
- ◯ Once a month
- ◯ Never or rarely

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10. Questionnaire

budget

What was your organization's total budget in 2024 (in CHF)?

CHF

What was the budget for search engine advertising (Google Adwords etc.) in 2024?

CHF

What was the budget for marketing campaigns on social media (Facebook, Instagram, etc.) in 2024?

CHF

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10. Questionnaire

staff

How many full-time positions did your organization have in the following areas in 2024?

Organization overall	
marketing	
Online/Digital Marketing	
Social-Media	

For example: two people working 60% each correspond to a total of 1.2 full-time positions

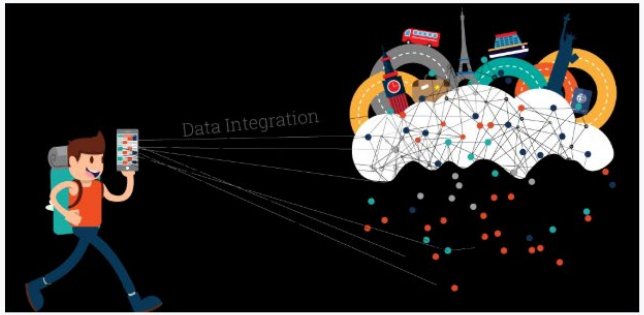
How many hours per week on average were devoted to social media in your organization in 2024?

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10. Questionnaire

use of data



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10. Questionnaire

Why do you collect data?

	Unimportant	less important	Important	Very important
Legal requirement	○	○	○	○
For monitoring (dashboards)	○	○	○	○
For marketing	○	○	○	○
Development of personalized offers	○	○	○	○
market survey	○	○	○	○
Strategic value of data	○	○	○	○
Accountability report of key performers	○	○	○	○
To learn from it	○	○	○	○
For the use of artificial intelligence (AI)	○	○	○	○

Are there other reasons for collecting data?

Enter your text here

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10. Questionnaire

What are the barriers to using the data?

	Unimportant	less important	Important	Very important
Legal requirement (data protection)	○	○	○	○
Lack of financial and human resources	○	○	○	○
Missing knowledge	○	○	○	○
No priority for tourism organisation	○	○	○	○
DMO partners do not want to share data	○	○	○	○
Costs of processing	○	○	○	○
Costs of use	○	○	○	○

Are there other barriers to the use of data?

Enter your text here

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10. Questionnaire

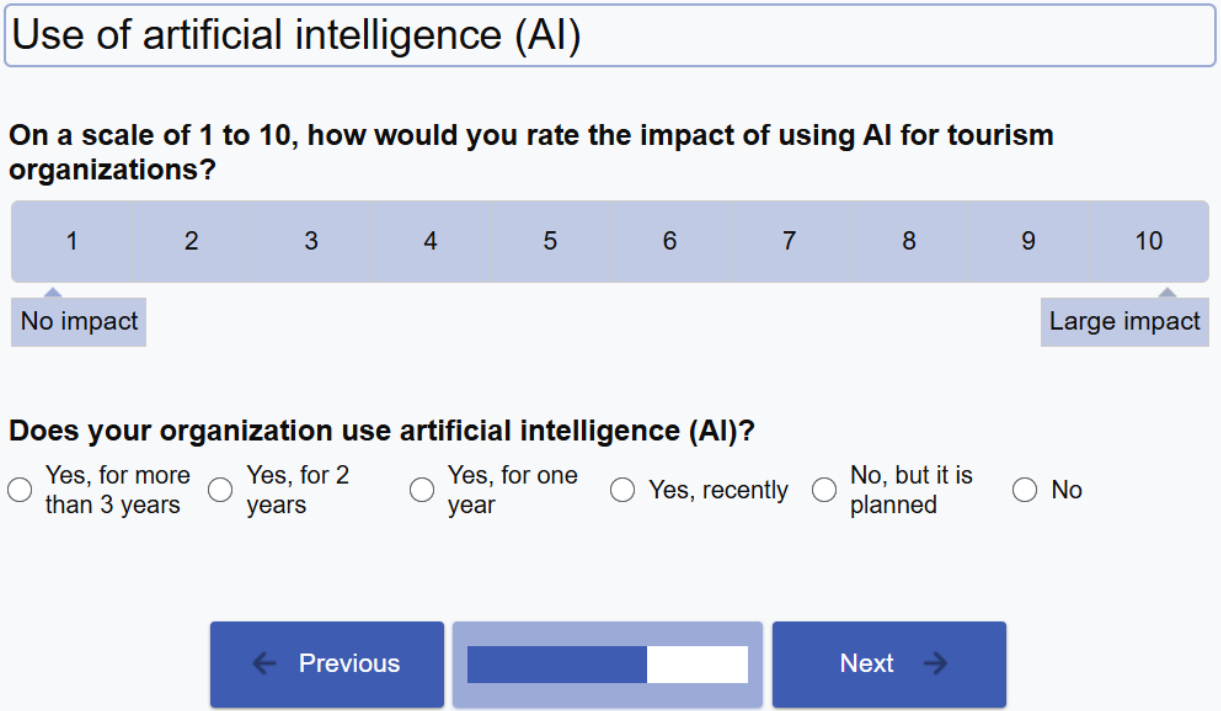
Does your organisation have a person or team dedicated to data analysis and strategy?

- ◯ Yes
- ◯ Is planned
- ◯ No, but we think we should take up the topic in the future
- ◯ No, is not a priority for us

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10. Questionnaire



10. Questionnaire

Does your organization use technologies that integrate or are based on artificial intelligence (AI)?

	Yes	It is planned	No	I don't know / Not applicable
ChatBot (automated instant messaging applications)	○	○	○	○
Virtual assistant (e.g. Siri from Apple, Alexa from Amazon)	○	○	○	○
Customer profiling (creation of uniform customer profiles)	○	○	○	○
Personalized customer service (personalized emails, recommendations)	○	○	○	○
Real-time revenue management (dynamic pricing)	○	○	○	○
Forecasts for overnight stays and other demand indicators	○	○	○	○
HR - Personnel Planning	○	○	○	○
Analysis and feedback on online customer reviews	○	○	○	○
AI-powered VR and AR applications	○	○	○	○
Generation of images (e.g. Midjourney, DALL.E2)	○	○	○	○
Generation of videos	○	○	○	○
ChatGPT, Bard or other text content generation services (email, website, marketing)	○	○	○	○
Translation tools	○	○	○	○
Specific tools for marketing (e.g. AI Enigma)	○	○	○	○

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10. Questionnaire

If you use other AI tools, please indicate which ones:

Enter your text here

What are the experienced or perceived benefits of introducing these technologies for a tourism organization? (Multiple answers possible)

- ☐ Improving operational efficiency
- ☐ Improved user experience
- ☐ Optimized tourist experience design
- ☐ Increase in sales
- ☐ Improved competitive position
- ☐ Reducing costs
- ☐ Time savings
- ☐ Improving decision-making
- ☐ Improved data management and analysis
- ☐ Improved response capability to emergency situations.
- ☐ Sustainable development (optimization of resources etc.)
- ☐ Improving communication and marketing
- ☐ Improved intercultural communication (internal and external)
- ☐ Other benefits

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10. Questionnaire

What particular challenges or obstacles have you encountered or do you see when integrating artificial intelligence into a tourism organization? (Multiple answers possible)

- ☐ High costs for setting up
- ☐ Lack of high-quality data
- ☐ Incompatibility of AI systems with our information system
- ☐ High technical complexity of AI systems
- ☐ Difficulty integrating AI into existing processes
- ☐ Difficulty finding a reliable service provider to support us in the introduction of AI
- ☐ Lack of internal technical skills to use AI
- ☐ Resistance to change from employees
- ☐ No support/ implication of management
- ☐ Strategy is focused on a traditional customer experience
- ☐ Poor knowledge of AI solutions available on the market
- ☐ Lack of understanding of AI in general
- ☐ Lack of understanding of the benefits of AI
- ☐ Uncertain return on investment (ROI)
- ☐ Lack of suitable, affordable and ready-to-use AI products
- ☐ Numerous unfinished or faulty AI products
- ☐ Strict data protection and privacy regulations
- ☐ Other challenges

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10. Questionnaire

In which areas do you think AI will be most useful for tourism organizations? (Multiple answers possible)

- ☐ Finance / Administration
- ☐ Human resources
- ☐ Reservations
- ☐ Customer relationship management (e.g. creation of customer profiles, personalized service for customers)
- ☐ Personalization of the customer experience
- ☐ Management of visitor flows
- ☐ Partner management/relationships
- ☐ Optimization of operational processes
- ☐ Quality management
- ☐ Strategic management
- ☐ Marketing (content generation for social media, websites, etc.)
- ☐ Forecasts
- ☐ Other areas

Your comments and observations on the use of AI in tourism:

Enter your text here

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10. Questionnaire

General information

Size of destination (number of overnight stays in hotels and para-hotels)

- ◯ Large (>1 million overnight stays)
- ◯ Medium (0.5-1 million overnight stays)
- ◯ Small (0.1-0.5 million overnight stays)
- ◯ Very small (less than 0.1 million overnight stays)

situation

- ◯ Mountain Destination
- ◯ City
- ◯ Other Location

Canton

◯ AG	◯ AI	◯ AR	◯ BE	◯ BL	◯ BS	◯ FR
◯ ENG	◯ GL	◯ GR	◯ YE	◯ LU	◯ NE	◯ NW
◯ OW	◯ SG	◯ SH	◯ SO	◯ SZ	◯ TG	◯ TI
◯ UR	◯ VD	◯ US	◯ ZG	◯ ZH		

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10. Questionnaire

