Digital Transformation of Tourism Organizations by 2025

*International Series of Surveys on DMOs (4 reports)*

Report 3

# Data Use, Management, and Tourism Intelligence in DMOs

Results of an online survey conducted between January and March 2026 in Austria, Canada, France, and Switzerland.

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*June 2026*

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# Executive Summary (1) — Background of the Study

This study is based on an international survey conducted in 2025 among destination management organizations (DMOs) in four countries (Switzerland, France, Austria, Canada), in collaboration with academic partners and tourism stakeholders in each country. More than 260 complete responses were collected.

This report is the first in a series of four publications, each dedicated to a specific theme (social media and distribution, digital transformation, data and artificial intelligence).

Our study was conducted as part of the Resilient Tourism project. The *Resilient Tourism* Flagship (www.resilienttourism.ch), supported by **Innosuisse**, aims to promote the datafication of the tourism and travel sector in Switzerland in order to create resilient, digitally supported services, processes, and business models. This program was designed by six research institutes in partnership with more than 30 Swiss stakeholders in the tourism sector.

# Executive Summary (2) — A Gradual Transition Toward Data-Driven DMOs

The study shows that **data is gradually becoming a central element of tourism destination management organisations (DMOs)**. DMOs no longer view data solely as a tool for reporting or producing statistics, but increasingly as a **lever for strategic management**, decision-making support, and the optimization of marketing initiatives. More than half of the organizations surveyed report that they already incorporate the use and analysis of data into their strategy, while a significant proportion plan to do so in the near future.

This trend is part of a **broader context of the datafication of tourism**, marked by the rise of artificial intelligence, digital platforms, and conversational environments. Data is gradually becoming an essential requirement for improving destination visibility, personalizing the customer experience, automating certain processes, and strengthening tourism competitiveness.

The study shows, however, that this **transformation remains highly uneven across countries and organizational sizes**. Major destinations appear significantly more advanced in structuring their resources, infrastructure, and analytical practices. They more frequently develop integrated approaches combining CRM, data platforms, automation, and forecasting tools. Conversely, many small DMOs still operate from a more operational perspective and have limited resources to establish effective data governance.

# Executive Summary (3) — Data is still used primarily for marketing and operational purposes

The results show that **data** is currently **used primarily to tailor marketing efforts, improve the monitoring of tourism activities, and develop personalized offers**. Uses related to forecasting, automation, and artificial intelligence are growing, but remain secondary in a significant number of destinations, particularly smaller organizations.

The analysis also reveals that the **main challenges faced by DMOs are less technological than organizational**. A lack of human and financial resources appears to be the primary obstacle in the four countries studied. Added to this are **deficits in analytical skills, difficulties in sharing data among partners, and significant fragmentation of digital systems**.

Open-ended comments particularly highlight issues related to data silos, interoperability, data quality, and dependence on large private platforms such as Google or Meta. Several organizations also highlight the difficulty of connecting heterogeneous systems or obtaining reliable, standardized data at the destination level. These factors show that the **main challenge** is no longer simply collecting data, but **building coherent infrastructures capable of supporting a data-driven tourism strategy**.

# Executive Summary (4) — Conclusion: Data as a Strategic Issue in Territorial Governance

The results suggest that DMOs are gradually entering a new phase of digital transformation in which **data is becoming a strategic asset for tourist destinations**. The most advanced organizations are no longer limited to a communication or promotional approach, but are progressively developing data-driven capabilities for management, coordination, and territorial intelligence.

This evolution **is also transforming the role of DMOs within tourism ecosystems**. Data is increasingly used **to strengthen coordination among stakeholders, provide objective decision-making support for elected officials and partners, improve transparency**, and support more sustainable and targeted development strategies.

The study shows, however, that a **growing risk of a digital divide between destinations** is emerging. Larger organizations have greater access to the resources needed to develop robust analytical infrastructures and integrate artificial intelligence into their processes. Conversely, many smaller destinations continue to face significant constraints in terms of skills, governance, and funding.

In a landscape marked by the rise of conversational engines, digital platforms, and generative AI, **destinations' ability to structure, govern, and leverage their data will likely become a key factor in tourism visibility, discoverability, and competitiveness** in the years to come.

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# International Context of the Study

Since 2015, HES-SO Valais-Wallis has been analyzing the digital transformation of tourism organizations / DMOs in Switzerland (social media, online distribution, data, AI).

In 2026, the study was expanded to an international scope to compare transformation dynamics across several countries: Austria, Canada, France, and Switzerland. This expansion allows for:

- a comparative analysis of DMOs' digital practices
- the identification of transferable models and strategies
- a better understanding of national ecosystems

The study covers a broader scope of digital transformation and will be documented in four separate reports:

I. Social Media and Online Distribution (Report 1)
II. Digital transformation (Report 2)
III. Data use and governance (**Report 3**)
IV. Adoption of artificial intelligence (Report 4)

# International Context of the Study

This study was conducted by HES-SO Valais-Wallis in Switzerland in collaboration with academic partners, tourism stakeholders, and experts in various countries. You will find the contact information for these partners at the end of the report.

Austria

- Austria Tourism
- SmartVisions – Dr. Roman Egger

Canada

- IA Tourism Group – Pierre Bellerose

France

- ADN Tourism - Christel Berlingué
- Distinctiv - Gregory Guzzo
- etourisme.info - Jean-Luc Boulin
- IA Tech Travel Café - Nicolas François
- National e-Tourism Conference - Ludovic Dublanchet

Switzerland

- HES-SO Valais-Wallis, Institute of Tourism – Dr. Roland Schegg, Dr. Michael Fux, Dr. Marc K. Peter

# Background

This study was conducted as part of the *Resilient Tourism* project. The ***Resilient Tourism* Flagship** (www.resilienttourism.ch), supported by **Innosuisse**, aims to promote the digitization of the tourism and travel sector in Switzerland in order to create resilient, digitally supported services, processes, and business models. This program was designed by six research institutes in partnership with more than 30 Swiss stakeholders in the tourism sector.






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# Methodology - Questionnaire

The questionnaire is structured around four main themes covering the key dimensions of the digital transformation of DMOs:

I. **Social media and online distribution**: Analysis of the platforms used (social media, reviews, messaging apps), their role in visibility, and their connection to web traffic. This section also explores the integration of DMOs into booking processes (DMS, role as an intermediary or distributor).

II. **Digital Transformation and Strategic Projects**: Identification of strategic priorities, ongoing projects (technologies, digital marketing, automation, new models), and the main organizational challenges in the digital age.

III. **Data Use and Management**: Assessment of data integration into DMO strategies: objectives (marketing, personalization, forecasting), internal organization (resources, skills), and obstacles (technical, financial, governance).

IV. **Artificial Intelligence** (AI): Analysis of the level of AI adoption, use cases (chatbots, content generation, pricing, forecasting), perceived benefits, as well as integration challenges (skills, costs, ROI, regulatory framework).

# Methodology - Survey Administration

This study is based on an internationally coordinated data collection effort. HES-SO Valais-Wallis conducted the data collection in Switzerland, while in the other countries (Austria, France, and Canada), it was carried out by local academic and professional partners.

In **Switzerland**, data collection was conducted via a targeted mailing campaign using an existing mailing list, allowing for direct contact with tourism organizations.

In **France**, the campaign utilized a multi-channel approach, combining:

- email campaigns via project partners,
- posts on LinkedIn,
- specialized newsletters (ADN Tourisme, etourisme.info)
- as well as a dedicated article published on the etourisme.info blog

In **Austria**, the survey was distributed via direct mail and industry newsletters, in collaboration with Austria Tourism and its networks.

In **Canada**, data collection relied on a targeted mailing supplemented by coverage in the specialized tourism press, to maximize visibility among DMOs.

This country-specific dissemination strategy reflects the unique characteristics of national ecosystems and aims to optimize the response rate. It also means that the composition of the samples may vary depending on the channels used, particularly in terms of the size and profile of the responding organizations.

# Methodology - Analysis

The analysis is primarily based on a descriptive approach, aimed at identifying general trends, differences between countries, and variations according to DMO profiles.

The results are presented in the form of descriptive statistics (means, medians, distributions) and cross-tabulations (by country, destination size).

It should be noted, however, that not all respondents completed all questions, resulting in variations in the number of observations across analyses. The results should therefore be interpreted with these sample differences in mind.

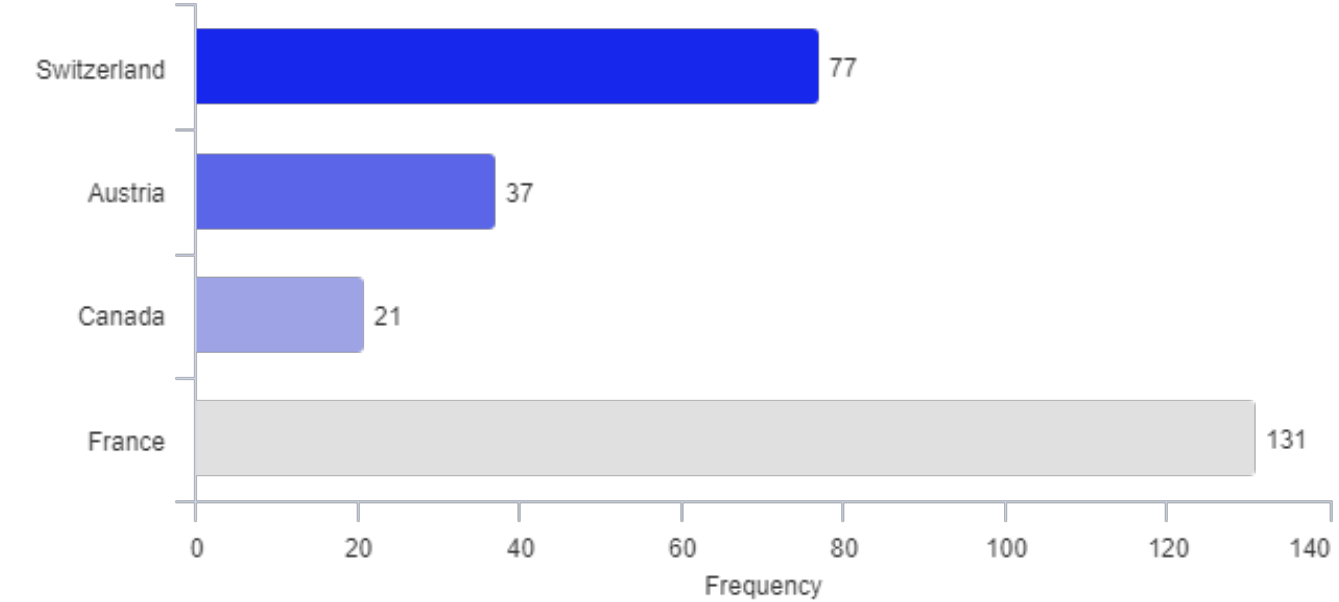
Furthermore, certain comparative analyses are influenced by the composition of the national samples, particularly in terms of the size and type of DMOs.

In this context, the results should be understood as indicative trends rather than as strictly representative measures of the entire sector.

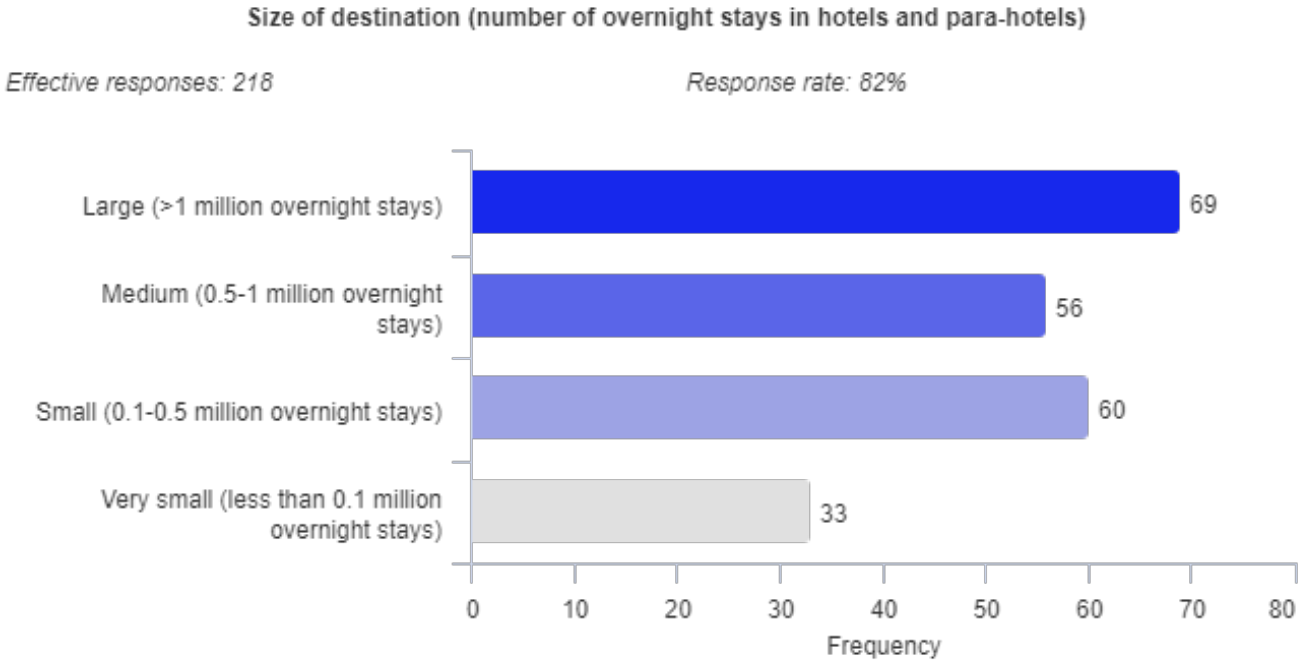
# Sample: Country

*Effective responses: 266*

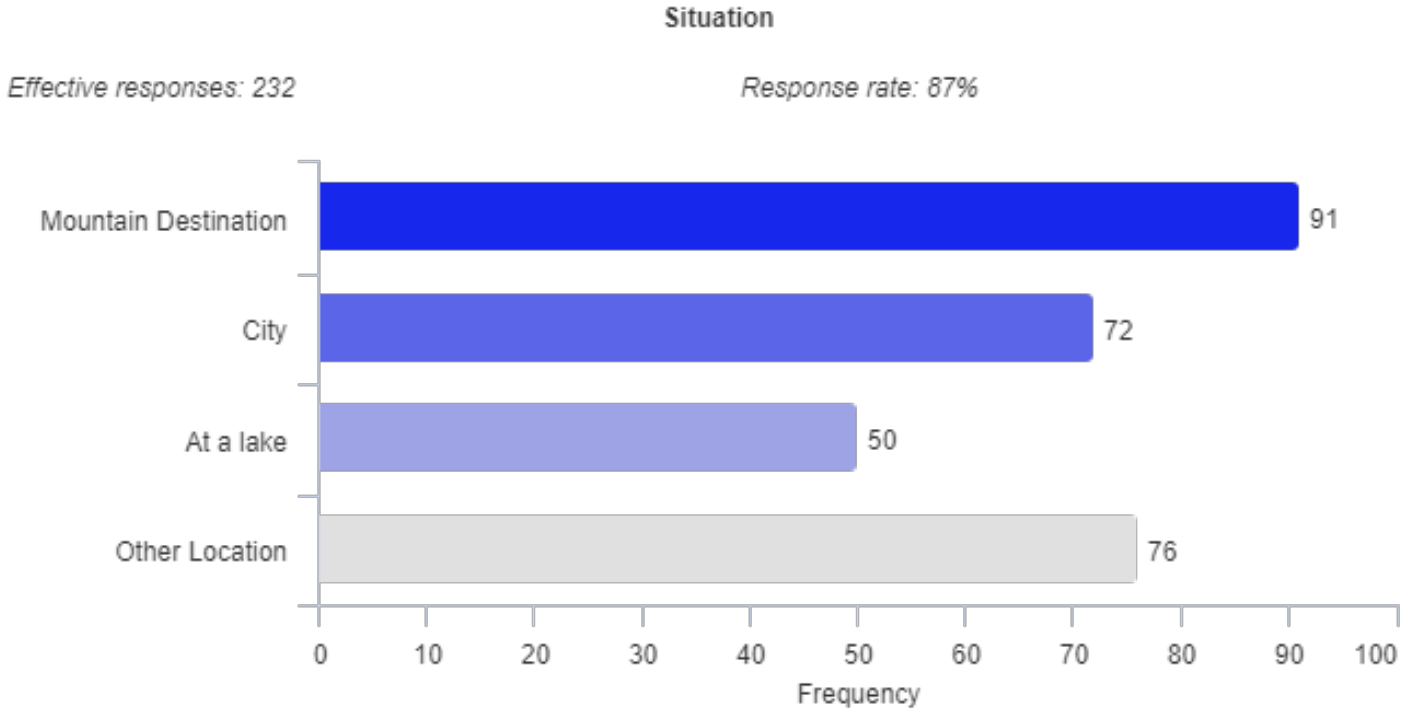
*Response rate: 100%*



# Sample: DMO size



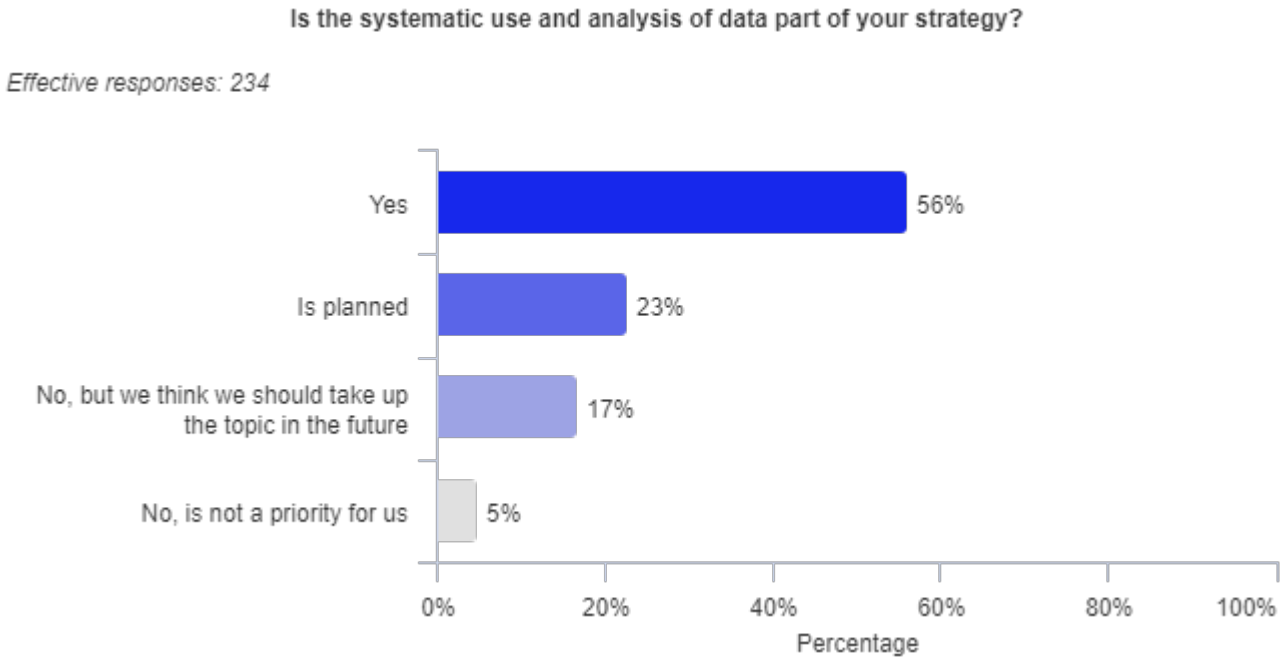
# Sample: DMO Situation



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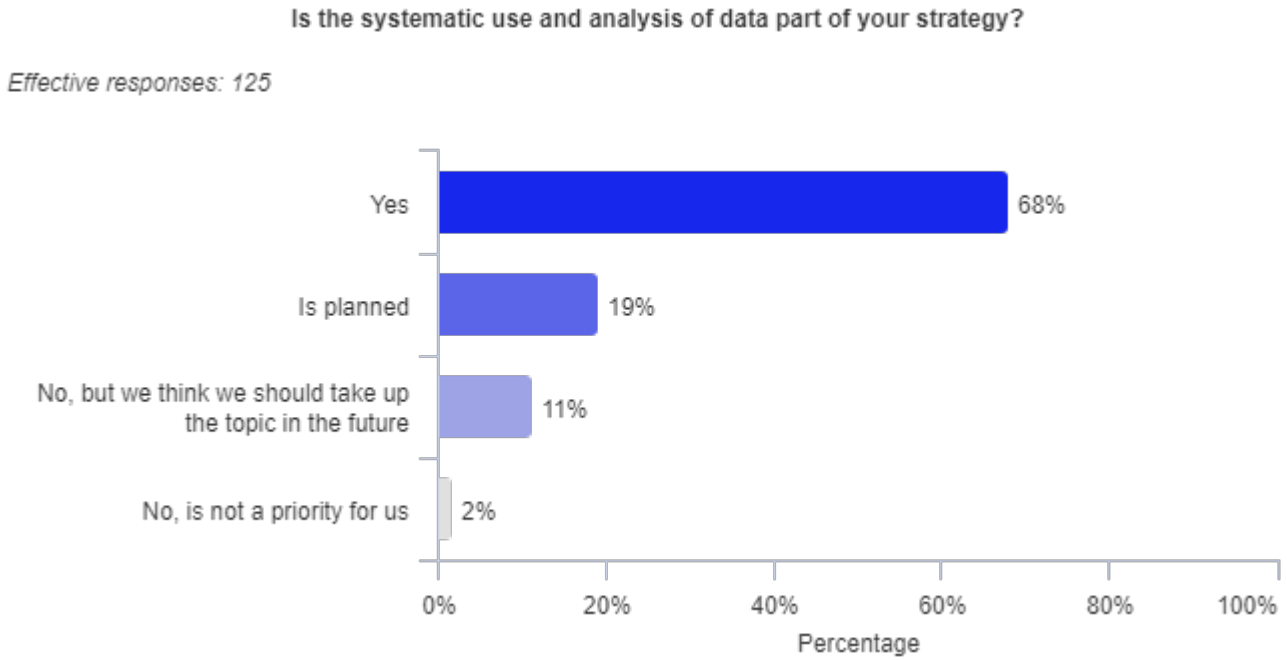
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# The Role of Data in DMO Strategy
## (global sample, 4 countries)



# The Role of Data in DMO Strategy

## (global sample, 4 countries, DMOs > 500,000 overnight stays)

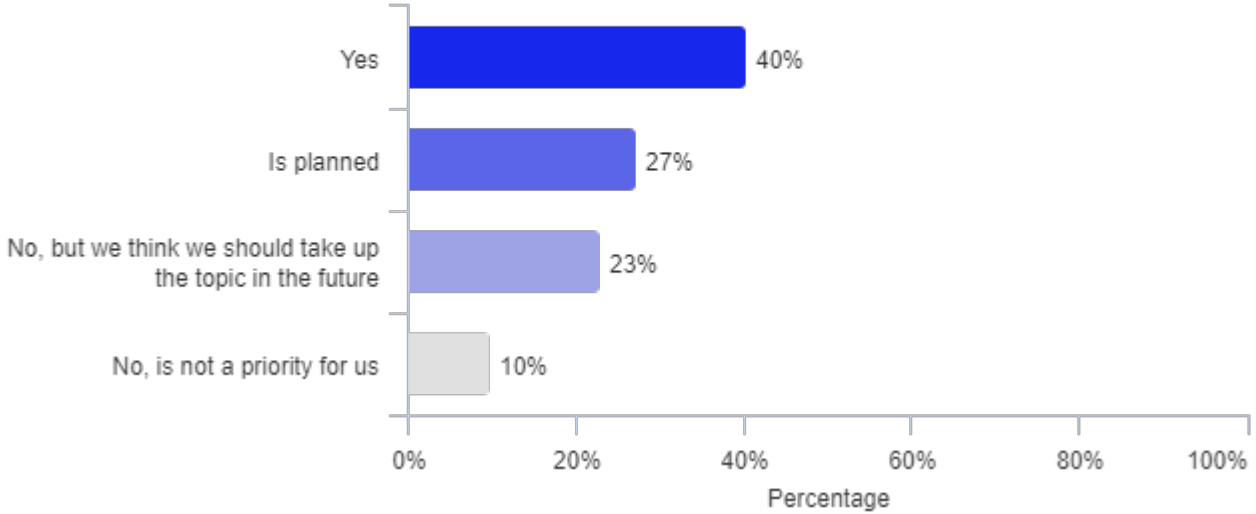


# The Role of Data in DMO Strategy

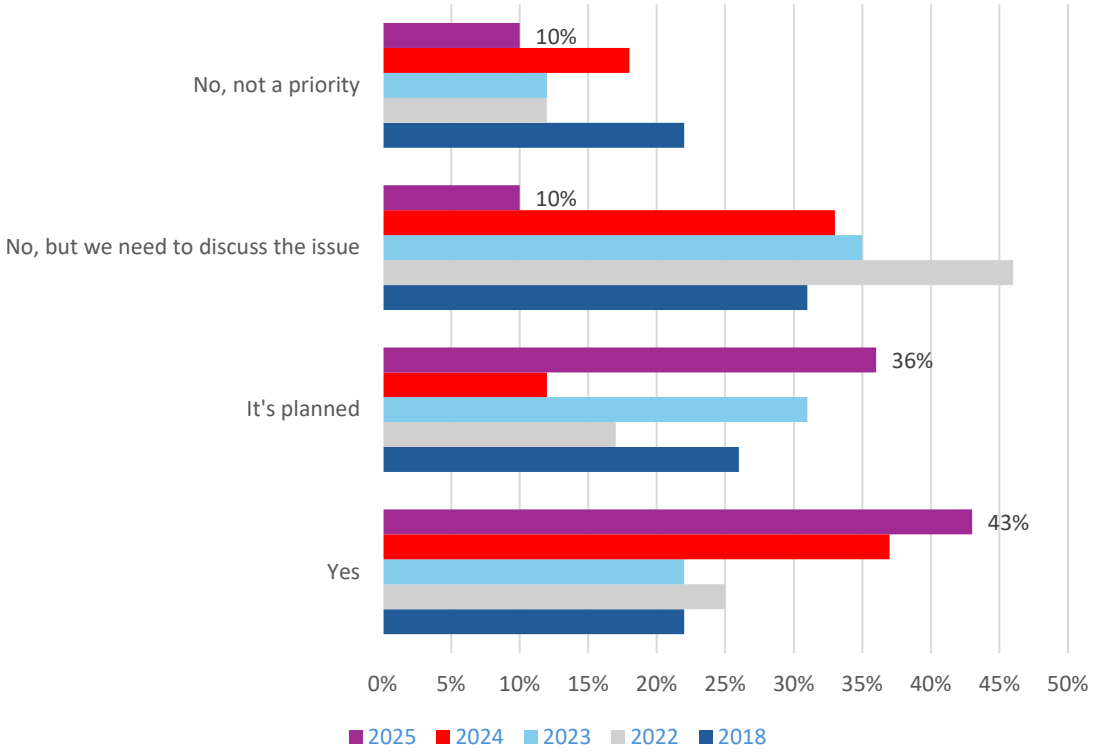
## (global sample, 4 countries, DMOs < 500,000 overnight stays)

Is the systematic use and analysis of data part of your strategy?

*Effective responses: 92*



# The Role of Data in the Strategies of DMOs in Switzerland: Trends from 2018 to 2025




The results show a **clear increase in the integration of this topic by 2025**. The "Yes" response reaches its highest level, indicating that the topic is now increasingly treated as a **concrete reality** within organizations.

The "Planned" category also remains significant, indicating that some respondents are still in the preparation phase. Overall, the data thus suggest a gradual shift from **awareness** toward **operational implementation**.

Conversely, negative responses remain more limited. This confirms that the issue is no longer a marginal one and is gradually emerging as a **strategic priority for organizations**.

# The Growing Role of Data in DMO Strategy

The results show that **data is gradually becoming a strategic pillar for DMOs**. In the overall sample, 56% of DMOs report that they already incorporate the systematic use and analysis of data into their strategy, while 23% plan to do so in the near future.

The **difference between large and small destinations is particularly striking**. Among DMOs generating more than 500,000 overnight stays, nearly 70% have already integrated data into their strategy, compared to only 40% for smaller organizations. Conversely, a much higher proportion of small DMOs view data as a future priority rather than a current one.

These results confirm that the **datafication of tourism is progressing**, but also that the ability to leverage data remains strongly linked to organizational resources, available skills, and the digital maturity of destinations. Large DMOs appear to have already adopted a data-driven approach, while many smaller organizations are still in a transitional or experimental phase.

# The Role of Data in DMO Strategy: An International Comparison (I)

The country-by-country analysis highlights **relatively high levels of maturity regarding the integration of data into DMO strategies**, though at different paces and with varying dynamics. **Austria** (67%) and **Canada** (62%) appear to be the most advanced countries, with a clear majority of DMOs having already integrated the systematic use of data into their strategy. These results likely reflect more professionalized structures that are more oriented toward data-driven management.

**France** also shows a high level of integration (59%), but with a larger proportion of organizations still in a transition phase or engaged in strategic planning (22%). This reflects a strong momentum in addressing data-related challenges, but also greater heterogeneity in organizational contexts and available resources.

**Switzerland** stands out for its lower level of integration (43%), but also for having the highest proportion of DMOs reporting that the topic is "planned" (36%). This suggests that many Swiss organizations are currently in a phase of structuring and investment, rather than at an advanced stage of analytical maturity.

# The Role of Data in DMO Strategy: An International Comparison (II)

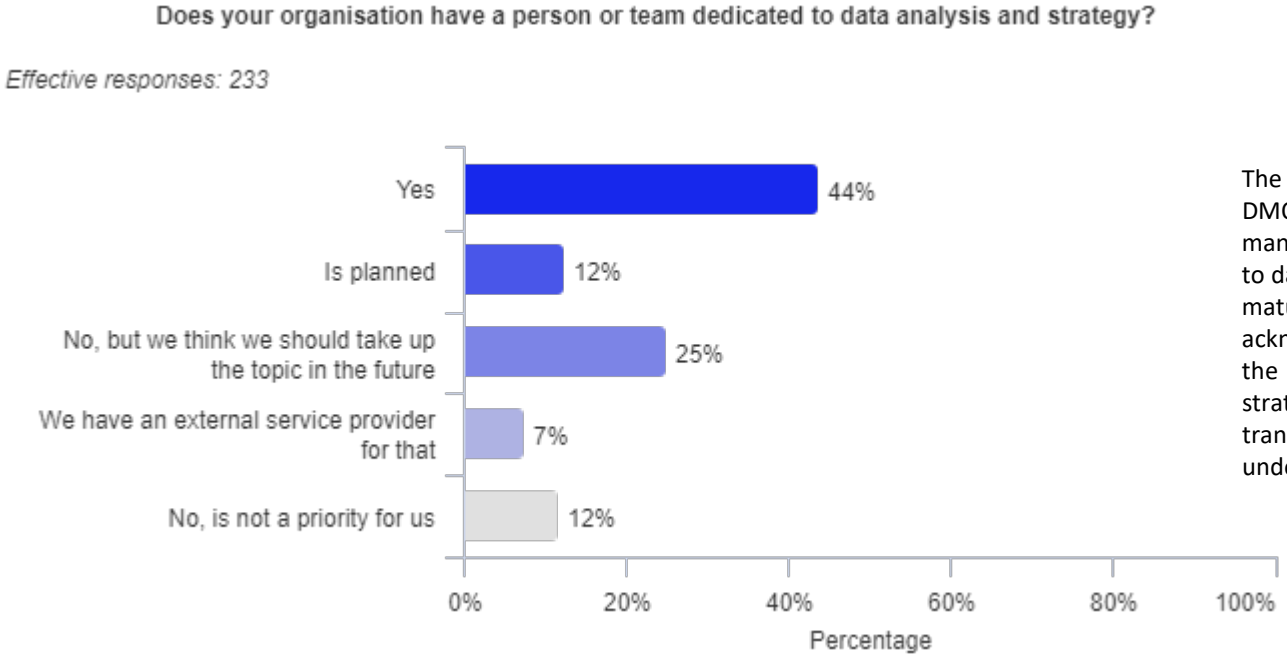
These comparisons should, however, be interpreted with caution, as the **structure of the samples varies significantly across countries**, particularly in terms of DMO size, level of professionalization, and the influence of major destinations. Canada and Austria have a proportionally higher number of large or centralized organizations, while Switzerland has a more fragmented landscape of small and medium-sized tourism organizations.

Overall, the results show that the digital transformation of DMOs is progressing in all four countries, but that the trajectories of this transformation remain strongly linked to the size of the organizations, internal capabilities, and the degree of structuring of the national tourism ecosystems.

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# Data organization and resources
## (overall sample, 4 countries)




The analysis shows that a significant proportion of DMOs have already begun to structure their data management: 44% have a person or team dedicated to data analysis and strategy. However, organizational maturity remains mixed. A quarter of organizations acknowledge that the issue should be addressed in the future, while 12% still do not consider data a strategic priority. These results confirm that the transformation toward “data-driven” DMOs is still underway.

# Data-related organization and resources versus the size of DMOs

Cross: Size of destination (number of overnight stays in hotels and para-hotels) / Does your organisation have a person or team dedicated to data analysis and strategy?

| SIZE OF DESTINATION (NUMBER OF OVERNIGHT STAYS IN HOTELS AND PARA-HOTELS) | 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 | WE HAVE AN EXTERNAL SERVICE PROVIDER FOR THAT | NO, IS NOT A PRIORITY FOR US | TOTAL |
| Large (>1 million overnight stays) | 52% | 13% | 19% | 9% | 7% | 100% |
| Medium (0.5-1 million overnight stays) | 46% | 18% | 21% | 7% | 7% | 100% |
| Small (0.1-0.5 million overnight stays) | 39% | 12% | 29% | 7% | 14% | 100% |
| Very small (less than 0.1 million overnight stays) | 27% | 9% | 42% | 6% | 15% | 100% |
| TOTAL | 43% | 13% | 26% | 7% | 10% | |

*Under-represented elements* *Over-represented elements*

*The relationship is not significant. p-value= 0.3 ; Chi2= 13.3 ; dof= 12.*

# Organizing data resources based on the size of DMOs

The cross-analysis reveals a clear—albeit statistically insignificant—relationship between the size of destinations and the level of organization of data resources. **The larger the DMOs, the more likely they are to have a person or team in charge of data analysis and strategy**: this is the case for 52% of large destinations (>1 million overnight stays), compared to only 27% of very small organizations (<100,000 overnight stays).

Conversely, **a significantly higher proportion of small DMOs acknowledge a current lag or a future need in this area**: 42% of very small destinations state that they should address the issue in the future, compared to only 19% of large DMOs. These results suggest that data-related challenges are now widely recognized across the sector, but that the ability to internalize analytical capabilities remains heavily dependent on available financial, human, and organizational resources.

Small destinations thus appear to operate more with opportunistic or outsourced approaches, while large DMOs are gradually moving toward more professionalized and integrated models of data governance. This confirms the existence of a risk of digital fragmentation between highly structured destinations and organizations with more limited resources.

# Data Organization and Resources: Country Analysis (I)

The analysis highlights **significant differences between countries** regarding the organizational structure of data-related competencies. Austria appears to be the most advanced country: 67% of DMOs report already having a person or team dedicated to data analysis and strategy. This result likely reflects a high level of professionalization as well as a greater concentration of major regional structures.

**Canada** (43%) and **France** (45%) show intermediate levels. In both countries, a significant proportion of organizations recognize the strategic importance of data but are still in the process of structuring their approaches. Canada stands out, however, for its relatively more frequent use of external service providers (14%), which may reflect critical mass constraints or a more flexible approach to outsourcing analytical capabilities.

# Data Organization and Resources: Country Analysis (II)

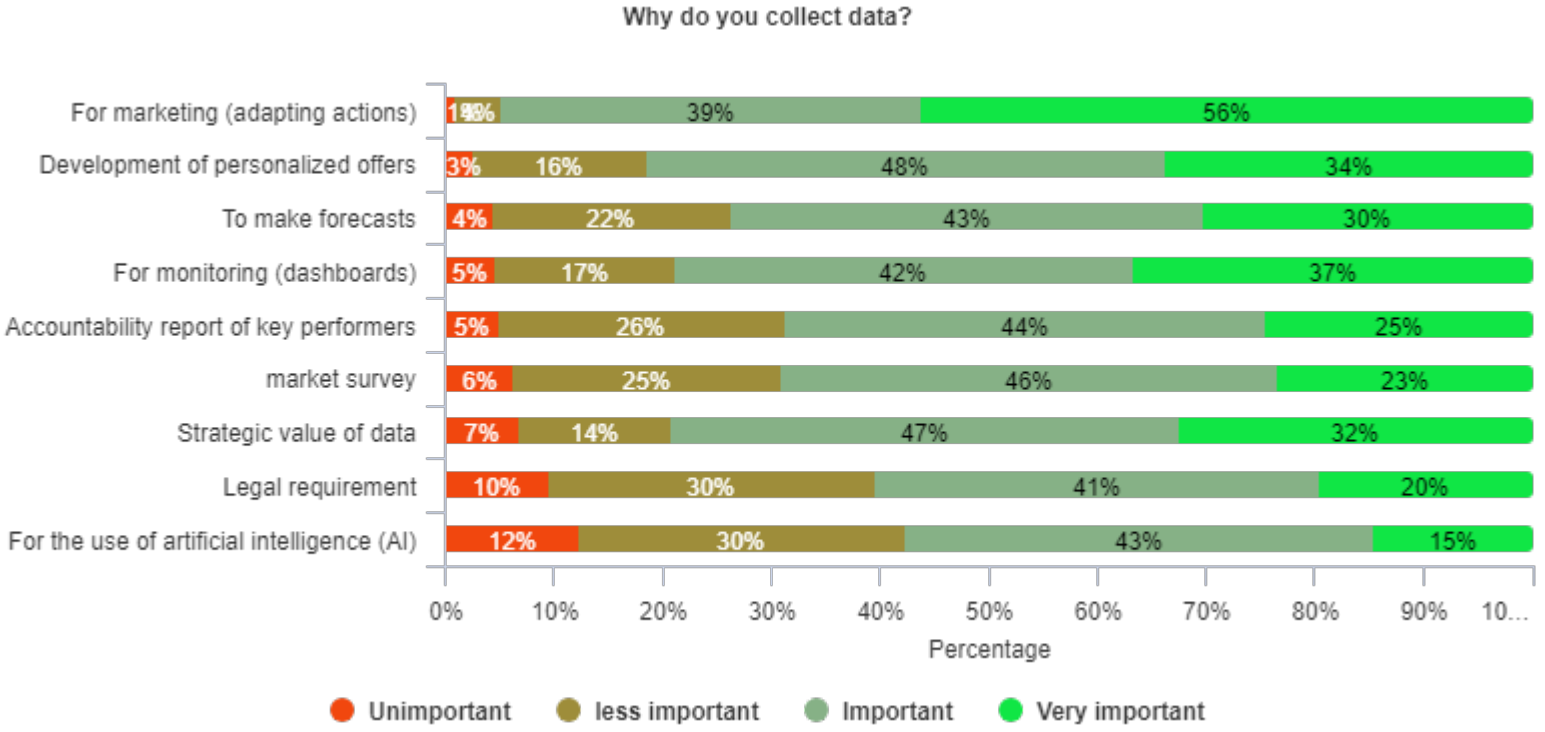
**Switzerland** has the lowest level of dedicated internal resources (37%) and the highest proportion of DMOs that do not consider the issue a priority (15%). This situation must, however, be viewed in the context of the structure of the Swiss tourism sector, which consists of a large number of small and medium-sized DMOs with limited resources.

Overall, the results show that **strategic recognition of data is progressing faster than the organizational capacity to establish specialized teams**. Many DMOs remain in a transitional phase where data governance relies heavily on a few individuals, ad hoc projects, or external partners, rather than on a truly integrated analytical function.

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# Objectives of the data collection
## (overall sample, 4 countries)



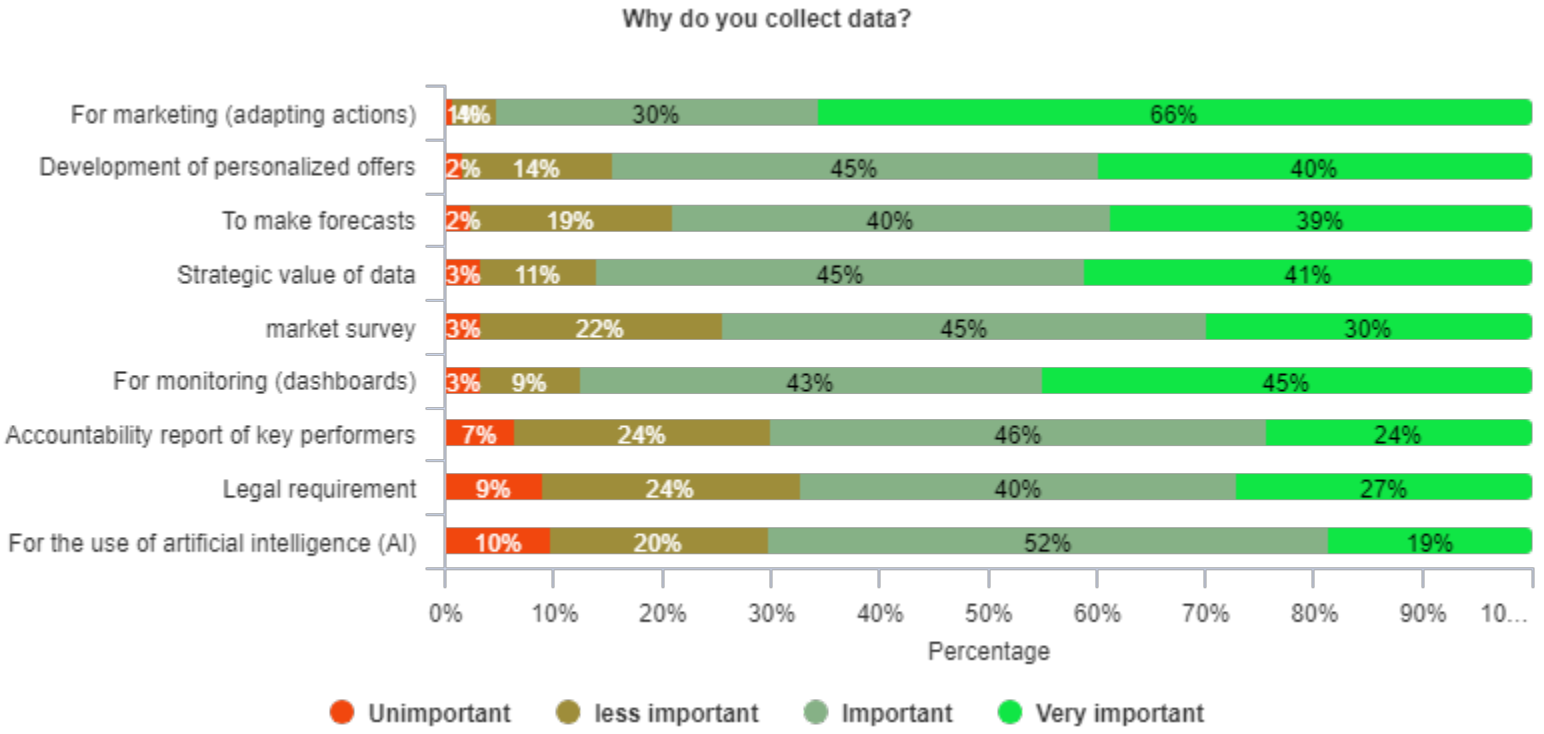
# Other reasons for collecting data: governance, legitimacy, and management

Beyond traditional uses related to marketing and monitoring, the **open-ended responses** reveal several additional motivations that demonstrate the gradual expansion of data's role within DMOs. Data is notably used to strengthen **strategic management** ("Strategic Management," "data-driven decision-making"), **improve transparency and internal communication** ("Transparency and Internal Communication"), or **to provide objective support for decisions when engaging** with **stakeholders** and elected officials ("To convince elected officials," "inform stakeholders in a fully transparent manner").

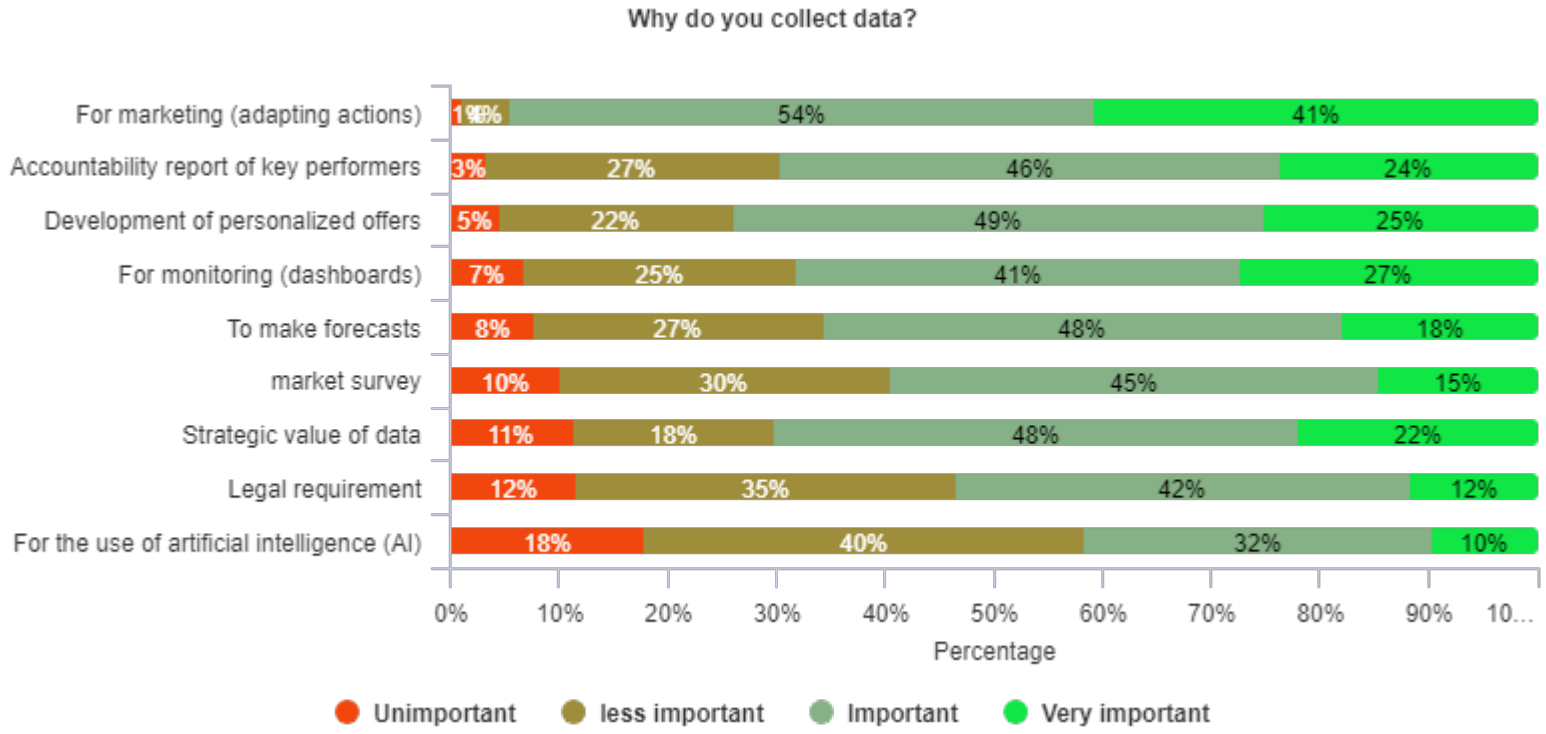
Several DMOs also highlight **the role of data in supporting tourism businesses and coordinating the local ecosystem** ("Supporting Businesses," "Leading Dissemination to the Industry"). Others highlight more operational or commercial objectives, such as optimizing marketing, generating revenue, analyzing off-peak periods, or improving the quality of tourism information.

These responses show that data is no longer perceived solely as a technical or marketing tool, but increasingly as an **instrument** of **territorial governance**, **institutional legitimacy**, and **coordination among tourism stakeholders**. They also illustrate the coexistence of very different levels of maturity: some DMOs are already developing a strategic vision for data, while others still report that they do not collect data or do not have structured uses for it.

# Objectives of the data collection
## (overall sample, 4 countries, DMO > 500,000 overnight stays)



# Objectives of the data collection
## (overall sample, 4 countries, DMO < 500,000 overnight stays)



# Objectives of data collection: primarily marketing and operational

The results show that DMOs primarily collect data **to optimize marketing and operations**. The dominant objective is clearly the adaptation of marketing initiatives, which 95% of respondents globally consider important or very important. Data is also widely used for monitoring, forecasting, developing personalized offers, and marketing studies. This confirms that DMOs **now view data as a central tool for managing** and improving tourism performance.

**Major destinations (>500,000 overnight stays), however, demonstrate a more strategic and advanced approach** to data. They place greater emphasis on the strategic value of data, monitoring, forecasting, and the development of personalized offers. They also make greater use of data in the context of artificial intelligence and automation. Conversely, smaller DMOs remain more focused on tactical or reporting uses, with an even less mature view of data as a strategic asset.

Another key finding concerns AI: despite the topic's high visibility in discussions about digital transformation, **the use of data to power artificial intelligence remains relatively limited**, particularly in smaller destinations. This suggests that many DMOs are still in the early stages of data structuring, before they can truly develop advanced applications related to AI, personalization, or intelligent automation.

# Toward a Shift from Reporting to Strategic Management

The analysis highlights a **gradual shift in the role of data within DMOs**. Historically used primarily to meet administrative requirements, generate reports, or measure visitor numbers, data is now increasingly becoming a strategic tool for destination management.

**However,** this **evolution remains uneven depending on the size and maturity of** the **organizations**. Large DMOs seem to be gradually adopting a "data-driven destination management" approach, where data is used to optimize marketing, personalize the customer experience, anticipate visitor flows, and support decision-making. Smaller organizations, on the other hand, are often limited by constraints related to resources, skills, and analytical infrastructure.

The results also suggest that the tourism sector is entering a **new phase where data quality, interoperability, and accessibility are becoming critical issues**. With the rise of generative AI, conversational search engines, and automated platforms, data is no longer used solely to analyze the past but is becoming an essential prerequisite for destinations' visibility, discoverability, and digital competitiveness.

# Comparative Analysis of Data Collection Objectives by Country

The **four countries share a common underlying rationale: data is primarily collected to improve marketing, monitoring, and the personalization of offerings**. However, significant differences emerge in terms of strategic maturity and the priorities assigned to data.

**Austria** has the most "advanced operational management"-oriented approach. Data is heavily used for marketing (67% "very important"), monitoring (50%), and forecasting (44%). Austrian DMOs appear to integrate data into a framework for destination management and optimization, consistent with structures that are often larger and more professionalized.

**Canada** stands out for its particularly strategic and commercial view of data. Marketing (81% "very important") ranks highest among the four countries, while the "strategic value of data" is also strongly recognized (55%). Data appears more as a lever for competitiveness and decision support, with a strong business and performance focus.

**France** presents a balanced and multidimensional approach. Data is used for marketing, personalization, forecasting, and strategic planning. The relatively high emphasis placed on the "strategic value of data" (38% "very important") reflects a growing maturity in thinking around governance and the digital transformation of destinations.

**Switzerland** adopts a pragmatic and operational approach. Monitoring and marketing clearly dominate, while uses related to AI, forecasting, or the strategic value of data remain less developed. This likely reflects a sample structure composed of a larger number of small and medium-sized DMOs with more limited resources.

# Strategic Analysis and Structural Effects of the Sample

The differences observed between countries should be interpreted with caution, as the **structure of the samples varies significantly**. Austria and Canada have a proportionally higher number of large DMOs or highly integrated organizations, while Switzerland has a larger share of small local structures. France, for its part, exhibits significant organizational heterogeneity, ranging from small destinations to more professionalized regional structures.

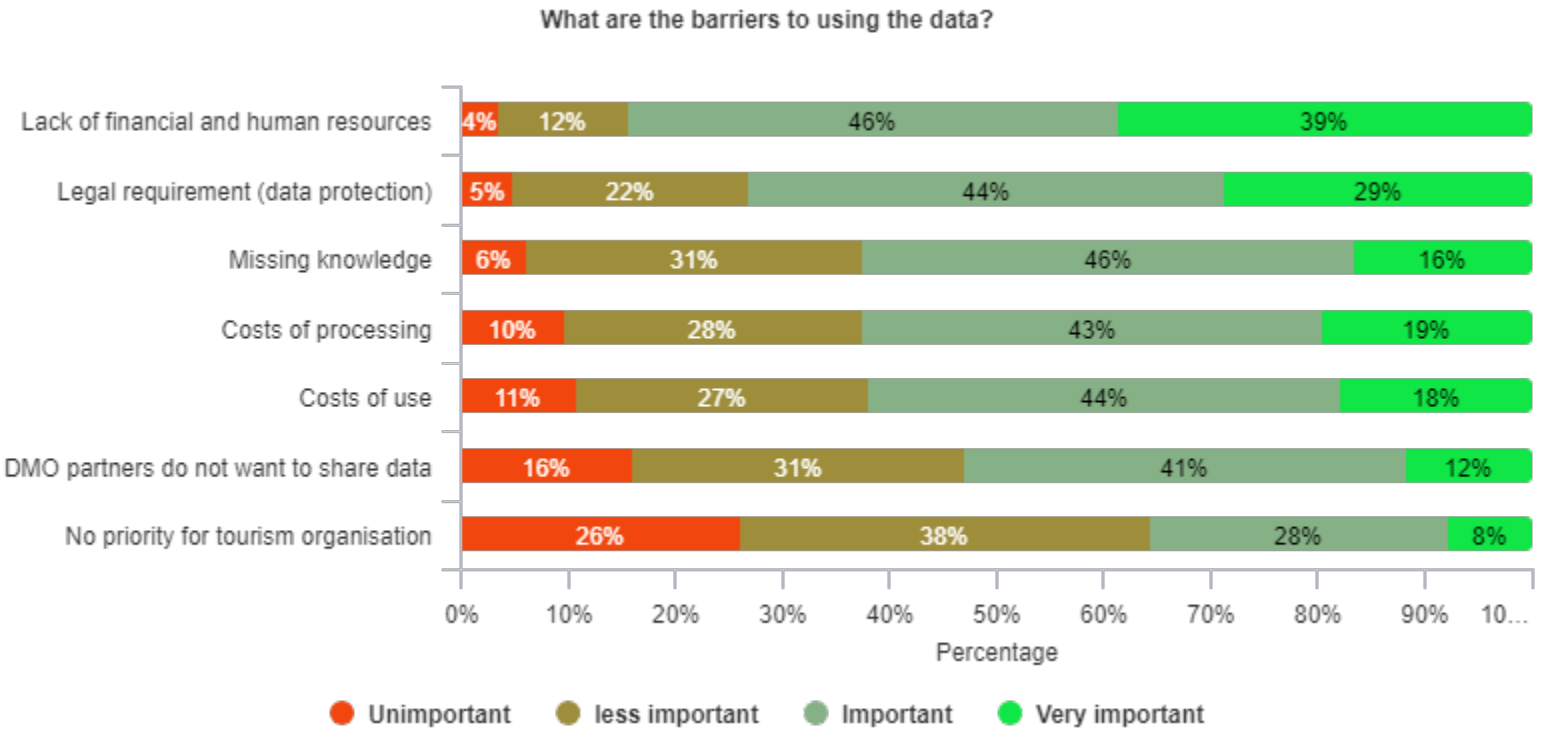
These structural differences directly influence data usage. **Large DMOs generally have more human resources, analytical capabilities, and technological infrastructure, which facilitates a more strategic use of data** (forecasting, personalization, performance management, AI). Conversely, smaller organizations remain more focused on tactical and operational uses, primarily related to marketing and activity monitoring.

The analysis thus confirms a significant fragmentation in the data maturity of DMOs. Even though data collection and utilization are gradually becoming standard practice in destination management, the transition toward true strategic data governance remains highly uneven depending on organizational and national contexts.

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# Barriers to data use
## (overall sample, 4 countries)



# Analysis of Other Barriers Mentioned in the Open Comments (I)

The open-ended comments reveal several structural obstacles that complement and qualify the quantitative results. The main emerging issue concerns the **fragmentation of systems and data sources**. Many respondents mention "data silos," a "multiplicity of sources," heterogeneous systems, or interoperability challenges ("impossible to connect," "different formats," "varying access permissions"). These remarks confirm that the challenge is not merely to collect data, but above all to build a coherent architecture capable of integrating data scattered across different tools and platforms.

**Data quality and reliability constitute a second** major **theme**. Several DMOs mention incomplete, non-standardized, or unrepresentative data, as well as difficulties in ensuring its analytical quality. Some respondents explicitly highlight the **risks of misinterpreting data** or the difficulty in measuring the actual impact of digital initiatives. These comments show that organizations are beginning to move beyond a purely quantitative mindset ("having data") toward more advanced concerns regarding data governance and quality.

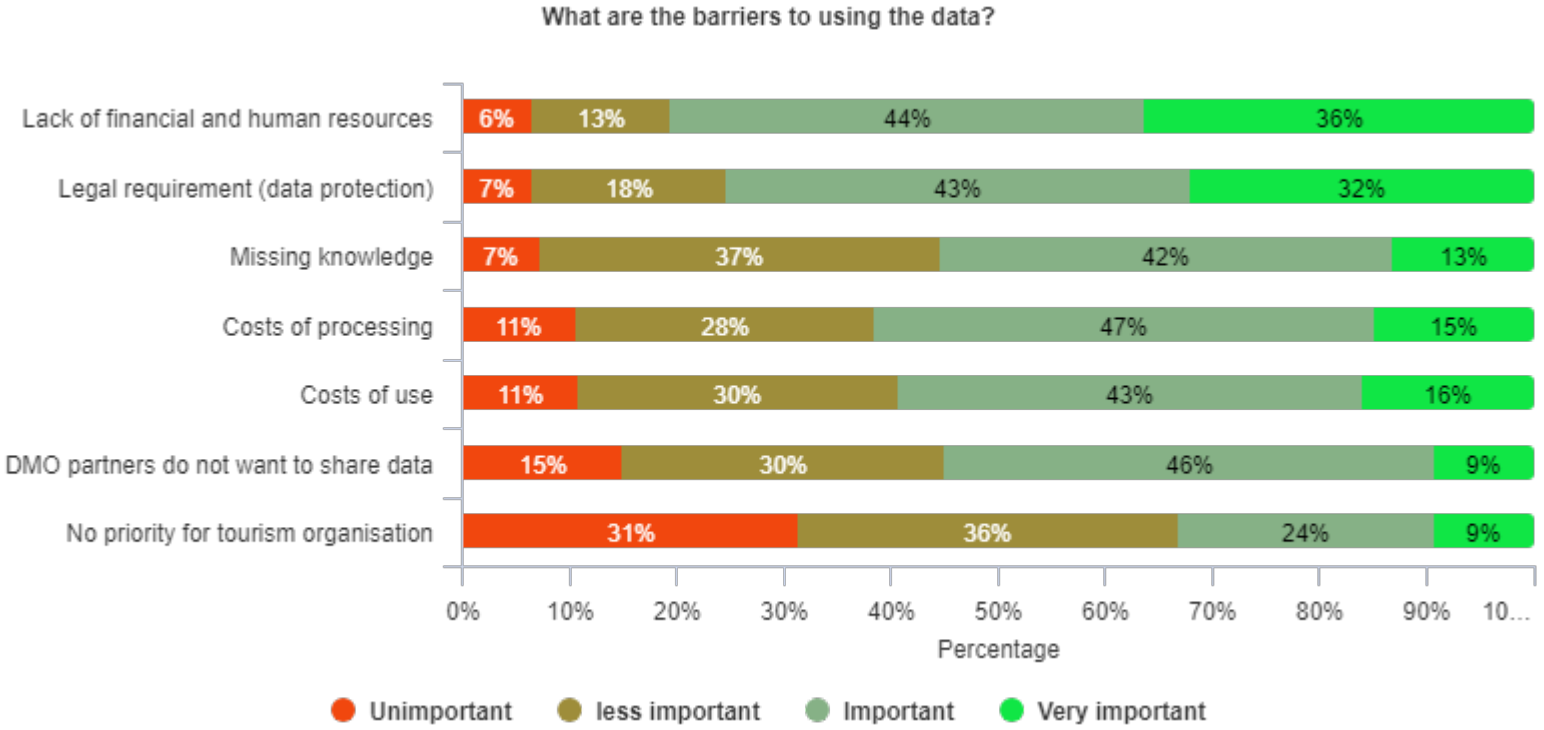
Another important dimension concerns **dependence on private digital platforms**. Some respondents explicitly mention a dependence on Google, Meta, or other external platforms, which control a significant portion of the available data and analytical access. This dependence limits DMOs' control over data and reinforces information asymmetries within the digital tourism ecosystem.

# Analysis of Other Barriers Mentioned in the Open Comments (II)

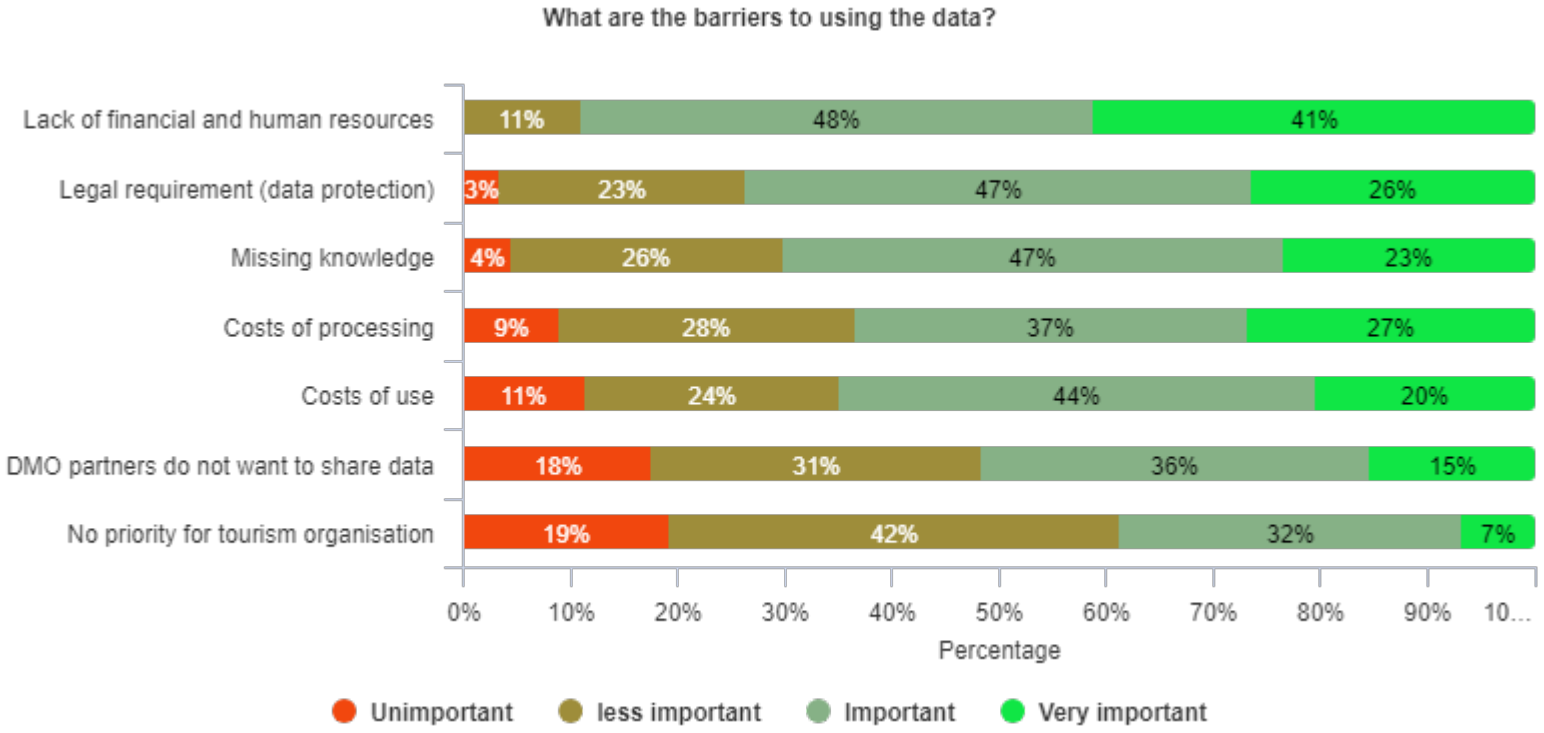
The comments also reveal **organizational and human barriers**: lack of internal cross-functional collaboration, lack of time, operational overload, and lack of training. These factors confirm that the obstacles to data-driven transformation are often more closely linked to organizational capabilities than to technology alone.

Finally, some comments highlight **more fundamental difficulties related to stakeholder and user engagement**: a reluctance among professionals to share data, visitors' unwillingness to share their information, or the absence of common standards. These observations show that the digital transformation of destinations depends heavily on collective dynamics of trust, cooperation, and regional governance.

# Barriers to data use
## (overall sample, 4 countries, DMO > 500,000 overnight stays)



# Barriers to data use
## (overall sample, 4 countries, DMO < 500,000 overnight stays)



# Barriers to Data Use (I)

The analysis shows that the **main barriers to data use in DMOs are not primarily technological, but organizational and human**. The lack of human and financial resources is by far the main obstacle: 85% of respondents in the overall sample consider it important or very important. This challenge is even more pronounced among small DMOs (< 500,000 overnight stays), where capacity constraints severely limit the development of advanced data strategies.

**Legal requirements** related to data protection also emerge as a significant obstacle, particularly for large destinations. This reflects a growing professionalization of data governance issues, but also the regulatory complexity associated with sharing and utilizing tourism data.

The **lack of analytical knowledge and skills** remains another major obstacle. The results show that many DMOs are still in the early stages of developing a data culture. The costs associated with preparing and using data are perceived as significant, but less critical than resource and skills challenges.

# Barriers to Data Use (II)

One particularly interesting finding concerns **data sharing within tourism ecosystems**. A significant proportion of respondents believe that partners are unwilling to share their data. This highlights issues of governance, trust, and interoperability in destinations, even though data-driven approaches require collaborative frameworks and shared platforms.

Finally, the fact that "it is not a priority" is relatively rarely cited confirms that data is now widely recognized as a strategic issue. The **main problem is therefore no longer awareness, but the practical ability to implement structured** and sustainable **data strategies**.

# A Comparative Analysis of Barriers to Data Use by Country

The four countries share a common observation: **the main barriers to data utilization are primarily human and organizational**. A lack of human and financial resources appears to be the main obstacle in all countries, particularly in Austria, Canada, and Switzerland.

**Austria** stands out due to significant challenges related to data sharing among partners, reflecting complex and highly interconnected tourism ecosystems. **Canada** places greater emphasis on regulatory constraints and resource challenges. In **France**, the obstacles are more evenly distributed among resources, skills, costs, and data governance, reflecting a high degree of heterogeneity among DMOs. In **Switzerland**, challenges related to internal capacity and analytical skills appear particularly pronounced, which is consistent with a sample composed of many small and medium-sized destinations.

Overall, the results show that the **main challenge is no longer access to technology, but rather the ability of DMOs to develop skills, resources, and mechanisms for collaboration around data**.

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# General Discussion: Toward "Data-Driven" DMOs, but at Different Paces

### A structural transition in destination management

The results clearly show that data is becoming a central pillar of tourism destination management. In the four countries studied, the majority of DMOs already incorporate—or plan to incorporate—data analysis into their strategy. Data is no longer used solely to produce statistics or reports, but is gradually becoming a tool for governance, coordination, and decision-making.

### Significant Variation in Maturity Levels

The study reveals, however, significant heterogeneity among DMOs. Larger destinations more often have dedicated teams, a strategic vision for data, and advanced applications (forecasting, personalization, management, AI). Smaller organizations remain more focused on short-term operational and marketing uses.

### A shift toward governance and territorial intelligence

The open-ended comments show that data is increasingly perceived as a lever for: territorial governance, gaining legitimacy among elected officials and partners, coordinating tourism stakeholders, and improving transparency. DMOs are thus gradually shifting from a reporting-focused approach to one centered on tourism intelligence and strategic destination management.

# Conclusion: The Main Challenges Facing DMOs in the Age of Data and AI

**The challenge is no longer technological, but organizational**

The main obstacles identified relate less to access to technology than to: a lack of human and financial resources, a shortage of analytical skills, the fragmentation of systems and data, as well as difficulties in collaboration and data sharing among partners. The “data-driven” transformation therefore depends above all on the organizational capabilities and governance of destinations.

**Quality and interoperability are becoming critical**

Open comments highlight recurring issues: data silos, a multitude of platforms, heterogeneous formats, low standardization, and dependence on private actors such as Google or Meta. In this context, the ability to structure, connect, and govern data becomes a major strategic challenge for destinations.

**AI could widen the gap between destinations**

Although AI applications remain limited, the findings suggest that the sector is entering a new phase of transformation. Data is now becoming an essential prerequisite for digital visibility, discoverability in conversational search engines, personalization, and the automation of tourism services.

The risk, therefore, is a growing divide between destinations capable of developing robust data infrastructures and those with more limited resources. The coming years will be crucial for building tourism ecosystems that are more collaborative, interoperable, and data-driven.

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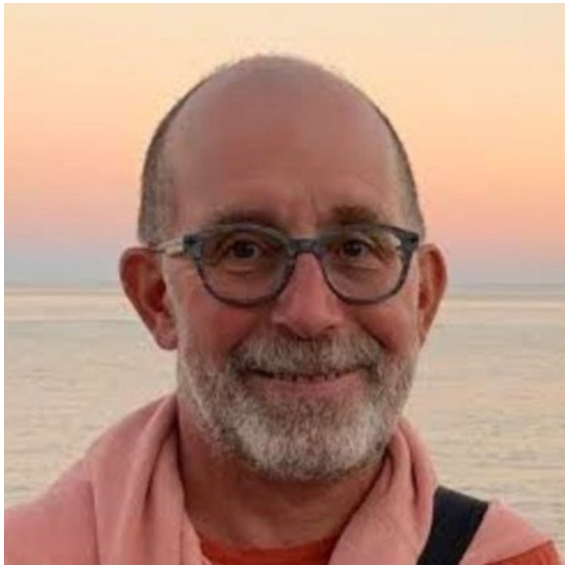
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# Resilient Tourism Flagship

Flagship supported by

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

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icare RESEARCH

EHL

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# Questionnaire

The **digital transformation** continues to advance in Swiss tourism – bringing with it new challenges and opportunities. **Social media**, **data-based decision-making** and the **use of AI** are now firmly established. However, current developments raise new questions: How are new tools, platforms and strategies changing the work of tourism organisations? What skills and structures are needed to actively shape digital change?

**Since 2015**, HES-SO Valais-Wallis has been conducting an annual survey of the digital development status of the tourism industry. Building on the last survey on artificial intelligence, this year's survey expands its focus to include new strategic topics related to digital transformation – from organisational development and data management to the use of innovative technologies.

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) & Dr. Michael Fux and Dr. Marc K. Peter, Institute of Tourism, University of Applied Sciences Western Switzerland Valais (HES-SO Valais-Wallis), Sierre

# Questionnaire

## Social Media and Online Distribution

**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

If 'others', which ones?

**Number of visitors to the website in 2025 (Unique Website Visitors)**

**What percentage of these website visitors were generated through social media in 2025?**

%

# Questionnaire

**How are bookings for hotels and holiday apartments handled by your tourism organisation (DMO)?**

- [ ] No bookings directly through tourism organisation
- [ ] Offline bookings through tourism organisation (telephone, counter)
- [ ] Link to external booking systems
- [ ] DMO acts as an intermediary
- [ ] Online bookings through own booking system (DMS)
- [ ] DMO acts as a tour operator

**What percentage of total overnight stays are booked through the tourism organisation (DMO)?**

____ %

**Which information and booking system (destination management system, DMS) does your tourism organisation (DMO) use?**

- ○ No DMS in use
- ○ DS Destination Solution (wild-east, HRS)
- ○ Tiscover
- ○ Alturos / Peak Solution
- ○ IncomingSoft (intobis)
- ○ TOMAS
- ○ CapAgent (CapCorn)
- ○ Ingénie
- ○ Visit Technology
- ○ Deskline Feratel
- ○ Open System Alliance Reseau
- ○ Other system

If other system, which? ____

# Questionnaire

Digital Transformation

**What are your biggest strategic/commercial challenges in the digital age? Please give us 2-3 keywords.**

Enter your text here

# Questionnaire

**What topics are you currently working on in your projects?**

| | No, we are not working on this issue. | Work on this topic is planned. | Yes, we are working on this issue. |
|---|---|---|---|
| Customer focus: projects aimed at increasing customer satisfaction in the digital age | ○ | ○ | ○ |
| New technologies: projects aimed at discovering or adopting new digital technologies | ○ | ○ | ○ |
| Data: projects aimed at improving and utilising data. | ○ | ○ | ○ |
| New strategies and business models: projects aimed at developing the company through new concepts, products and services. | ○ | ○ | ○ |
| Process management: projects aimed at digitising and automating processes. | ○ | ○ | ○ |
| The modern world of work: projects aimed at enhancing the attractiveness of employers in the digital age. | ○ | ○ | ○ |
| Digital marketing: projects aimed at successfully marketing your company/products on digital channels. | ○ | ○ | ○ |
| AI: projects aimed at implementing AI solutions in business processes. | ○ | ○ | ○ |
| Other topics | ○ | ○ | ○ |

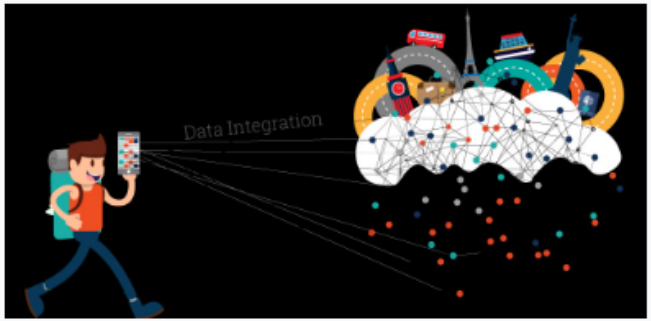
# Questionnaire

**What other topics/projects in the field of digital transformation are you working on or would you like to work on? Please give us 2-3 keywords.**

Enter your text here

# Questionnaire

use of data



# Questionnaire

**Is the systematic use and analysis of data part of your strategy?**

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

**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
- ◯ We have an external service provider for that
- ◯ No, is not a priority for us

# Questionnaire

**Why do you collect data?**

| | Unimportant | less important | Important | Very important |
|---|---|---|---|---|
| Legal requirement | ○ | ○ | ○ | ○ |
| For monitoring (dashboards) | ○ | ○ | ○ | ○ |
| For marketing (adapting actions) | ○ | ○ | ○ | ○ |
| Development of personalized offers | ○ | ○ | ○ | ○ |
| market survey | ○ | ○ | ○ | ○ |
| Strategic value of data | ○ | ○ | ○ | ○ |
| Accountability report of key performers | ○ | ○ | ○ | ○ |
| To make forecasts | ○ | ○ | ○ | ○ |
| For the use of artificial intelligence (AI) | ○ | ○ | ○ | ○ |

**Are there other reasons for collecting data?**

Enter your text here

# 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

# Questionnaire

## Use of artificial intelligence (AI)

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

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|---|

No impact — Large impact

**Does your organization use artificial intelligence (AI)?**

- ○ Yes, for more than 4 years
- ○ Yes, for 3 years
- ○ Yes, for 2 years
- ○ Yes, for one year
- ○ Yes, recently
- ○ No, but it is planned
- ○ No

**If you use AI, how do you rate the benefits of AI for your organization on a scale of 1 to 10?**

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|---|

Not useful at all — Very useful

# 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) | ○ | ○ | ○ | ○ |
| VoiceBot (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, Nano Banana, Ideogram etc.) | ○ | ○ | ○ | ○ |
| Generation of videos | ○ | ○ | ○ | ○ |
| ChatGPT, Gemini or other text content generation services (email, website, marketing) | ○ | ○ | ○ | ○ |
| Translation tools | ○ | ○ | ○ | ○ |
| Specific tools for marketing (e.g. AI Enigma) | ○ | ○ | ○ | ○ |

# 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 |
|---|---|---|---|---|
| Speech synthesis (e.g. Elevenlabs) | ○ | ○ | ○ | ○ |
| AI avatars (e.g. Heygen, Synthesia, etc.) | ○ | ○ | ○ | ○ |
| Music generation (e.g. Udio, Suno, etc.) | ○ | ○ | ○ | ○ |
| Automation tools with AI (e.g. Zapier, Make, n8n, etc.) | ○ | ○ | ○ | ○ |

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

Enter your text here

**Does your organization use paid AI systems?**

○ Yes ○ No, but it is planned ○ No

**Has your organisation implemented measures to improve its discoverability in generative AI-based tools?**

○ Yes ○ No, but it is planned ○ No ○ I do not know

**If 'Yes' or 'it is planned', how?**

Enter your text here

# Questionnaire

**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)
- ☐ Fewer mistakes
- ☐ More creative
- ☐ Other benefits

If 'Other benefits', which ones? _____

# 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 overall understanding of AI and its concrete benefits for the sector
- ☐ Environmental concerns and sustainability (carbon footprint, energy consumption 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

If 'Other challenges', which ones? _____

# 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

If 'Other areas', which ones?

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

Enter your text here

# 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
- ☐ At a lake
- ☐ 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 | | |

# Questionnaire

**Would you like a summary of the study? If so, please give us your email address:**

Enter your text here

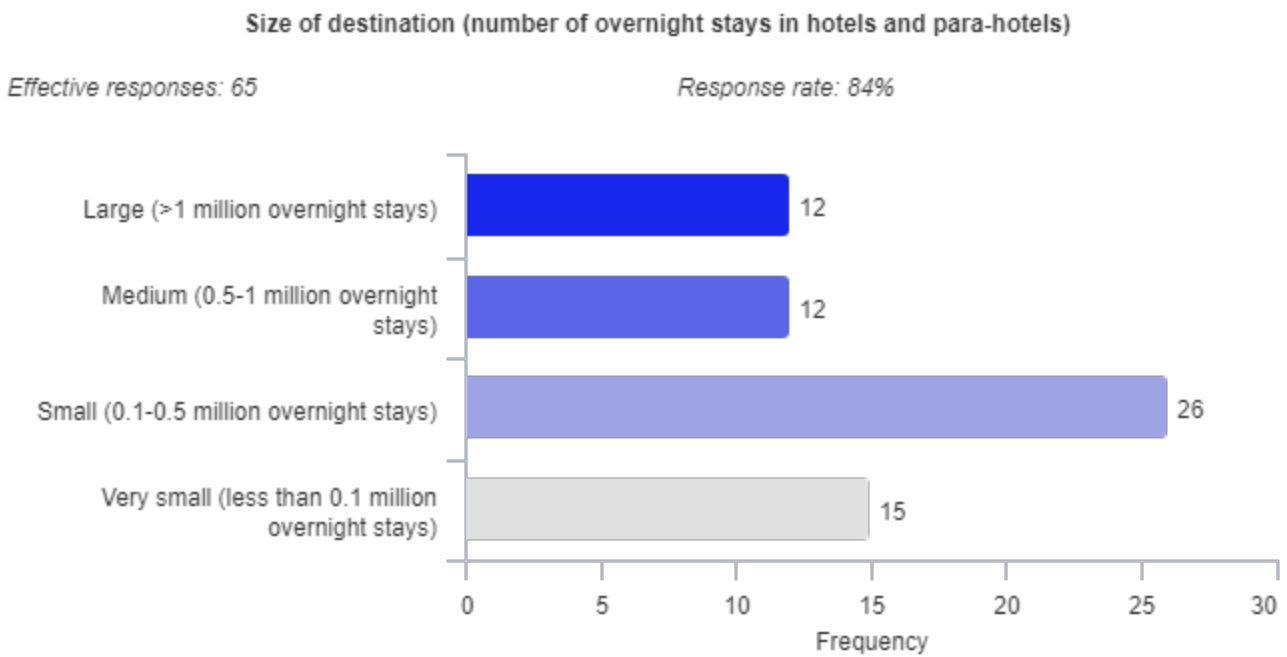
**Thank you for your cooperation. Please save your answers.**

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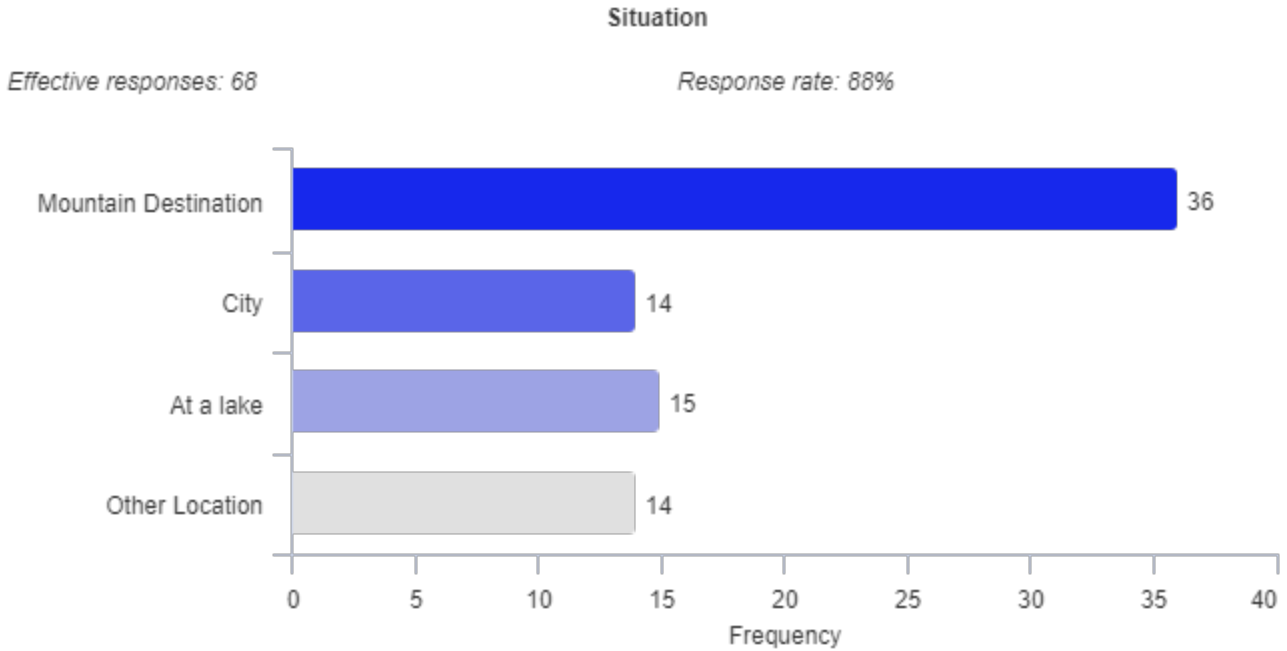
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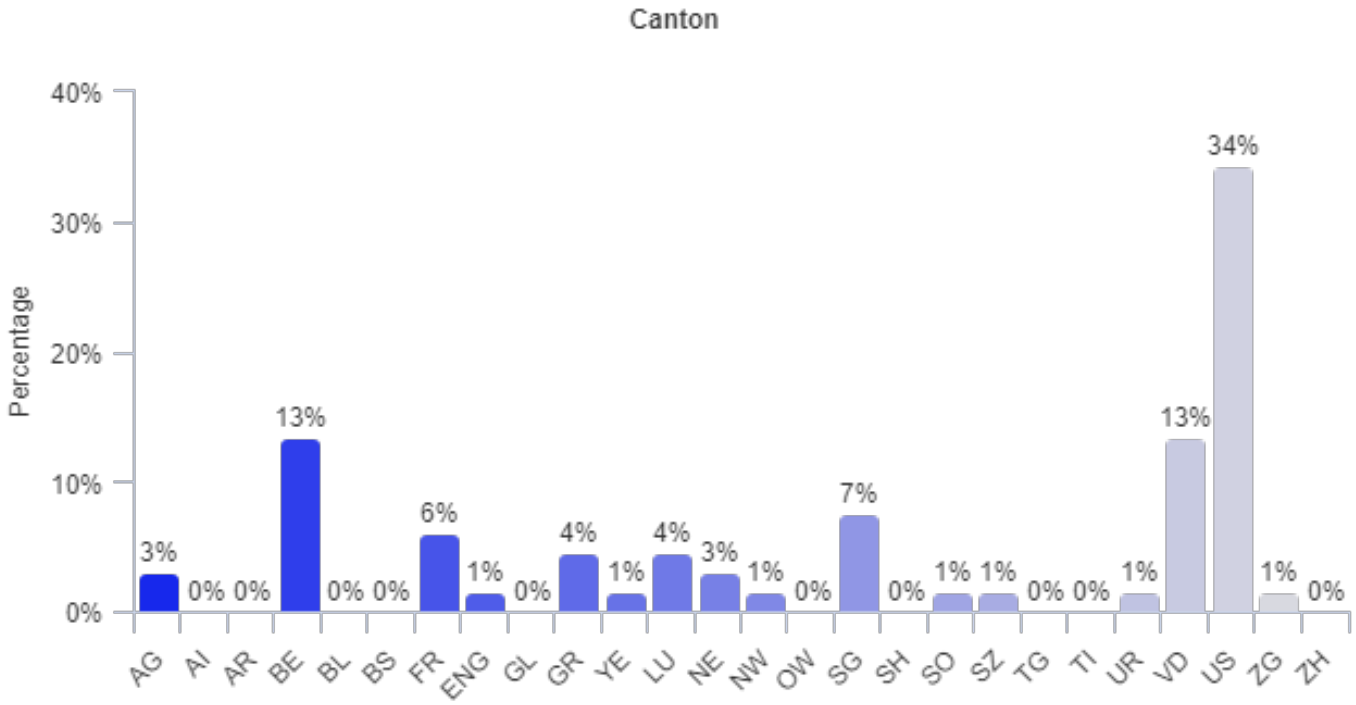
# Swiss Sample: DMO Size



# Swiss Sample: DMO Situation

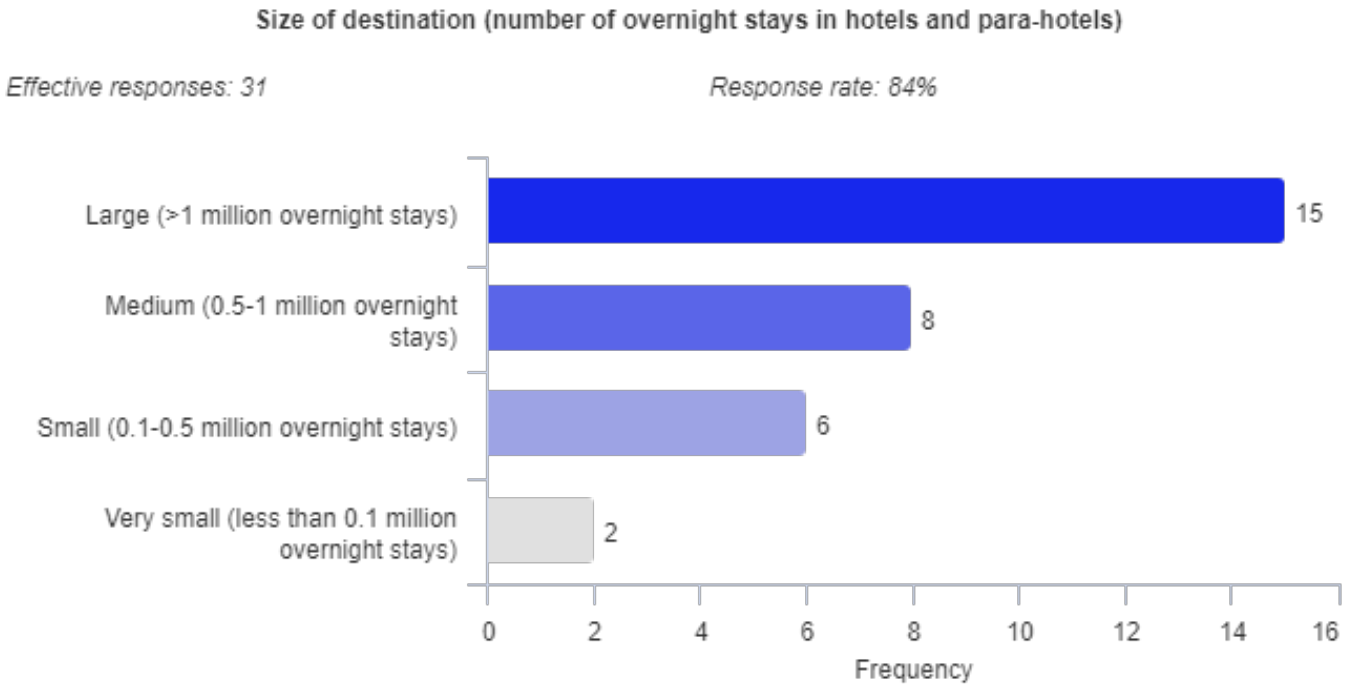


# Swiss Sample: Cantons

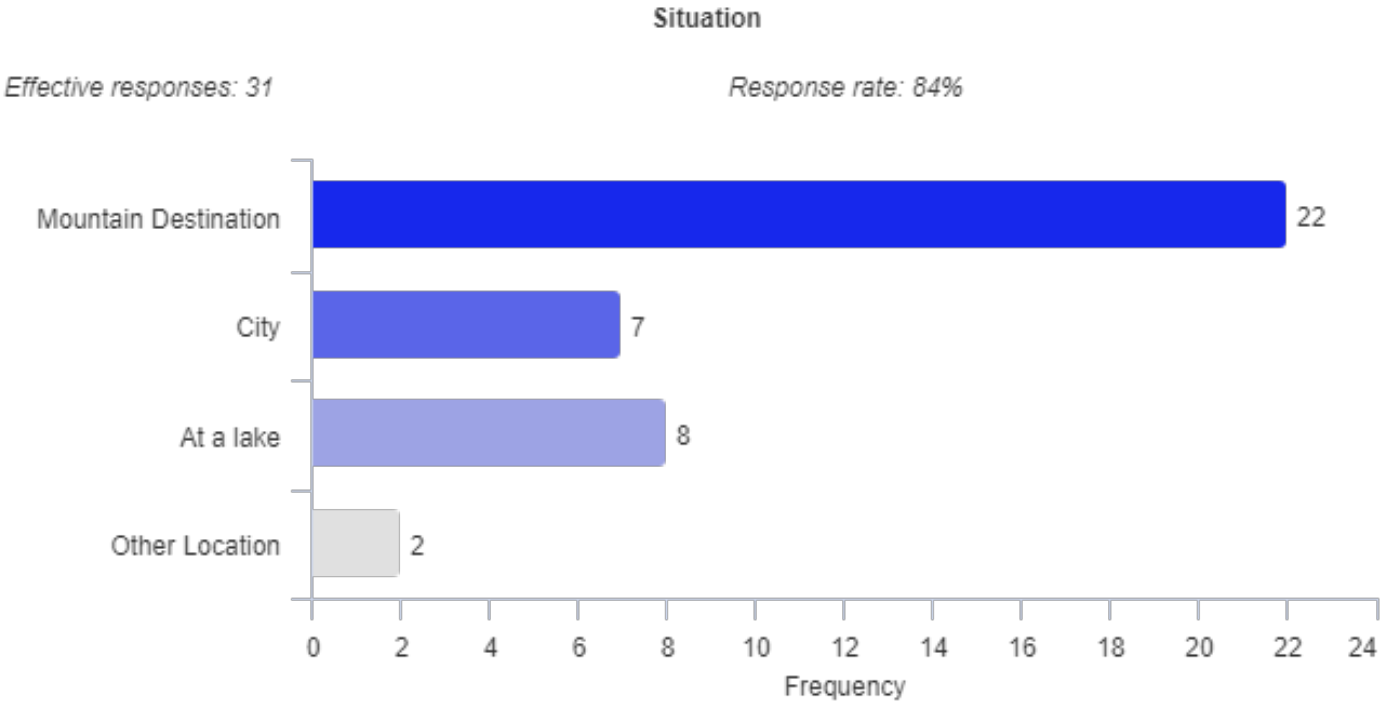




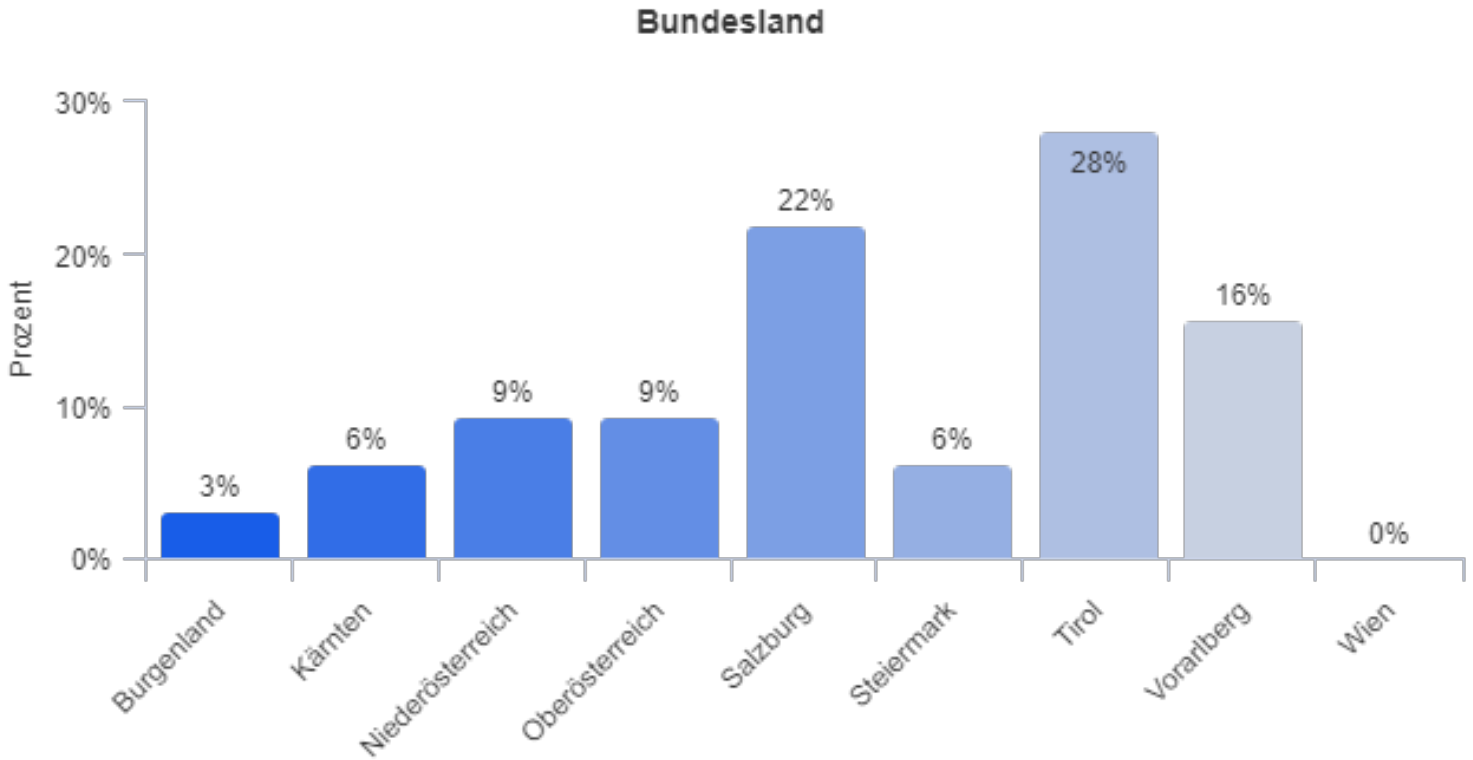
# Austrian Sample: DMO Size



# Case Study: Austria – DMO Situation

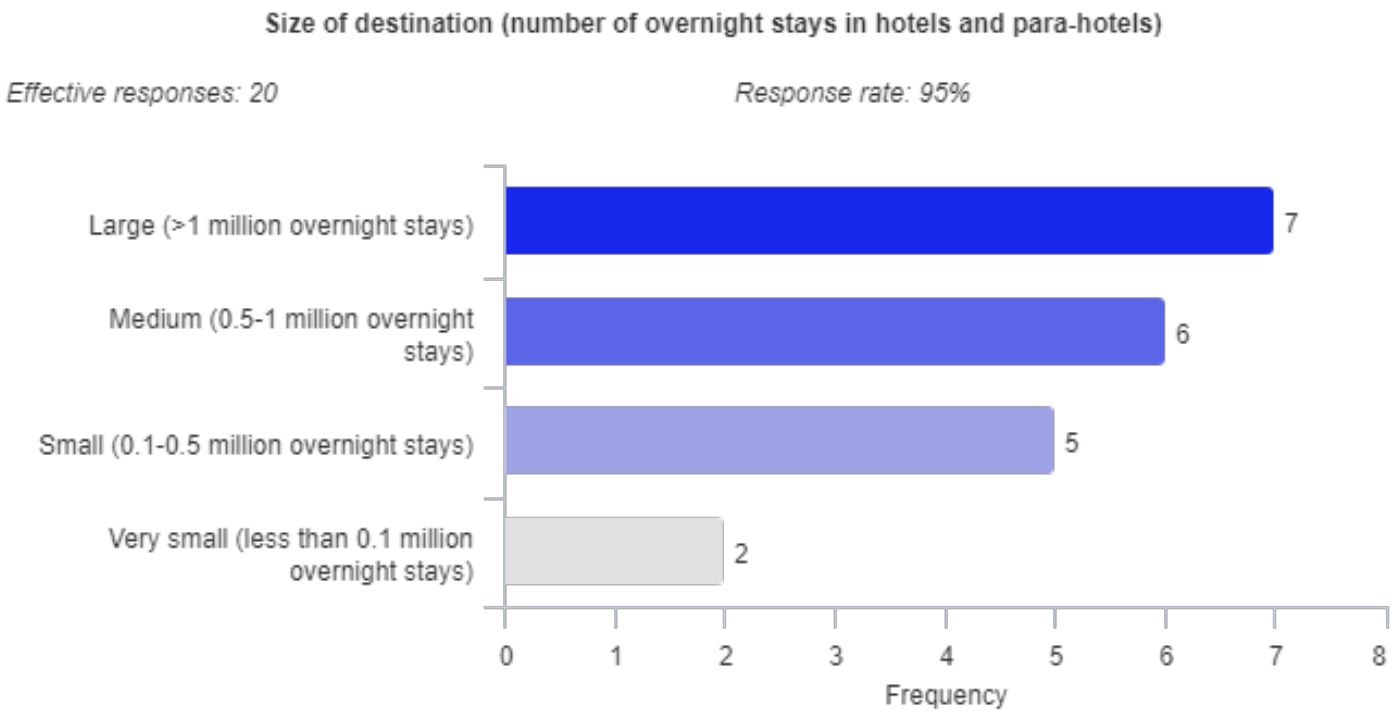


# Sample Austria: Regions

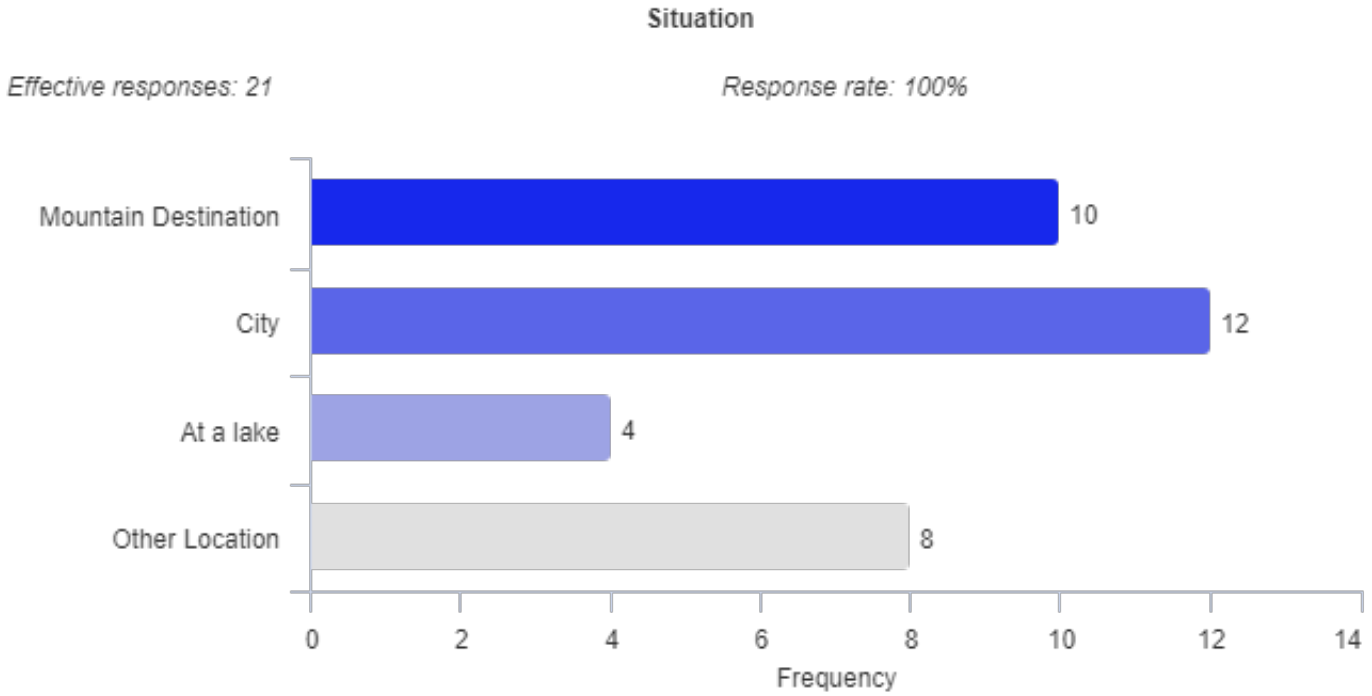




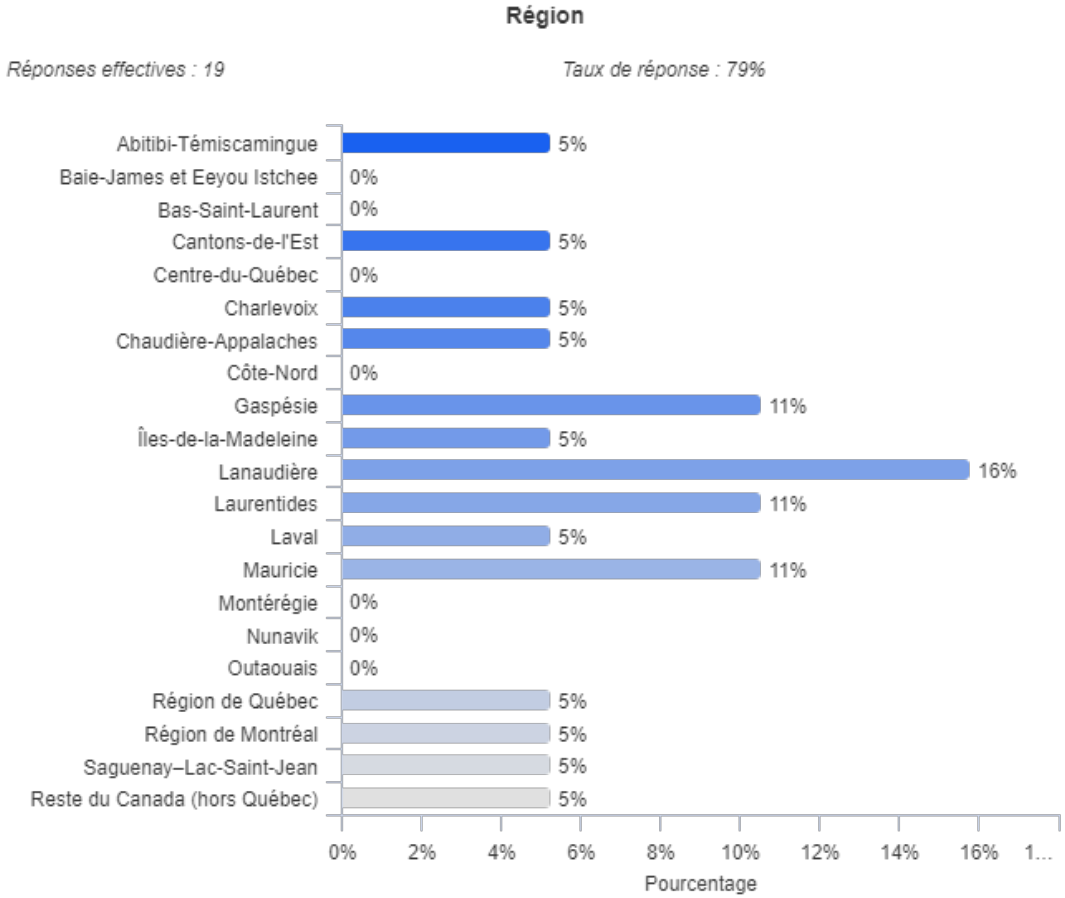
# Canada Sample: DMO Size



# Canada Sample: DMO Situation

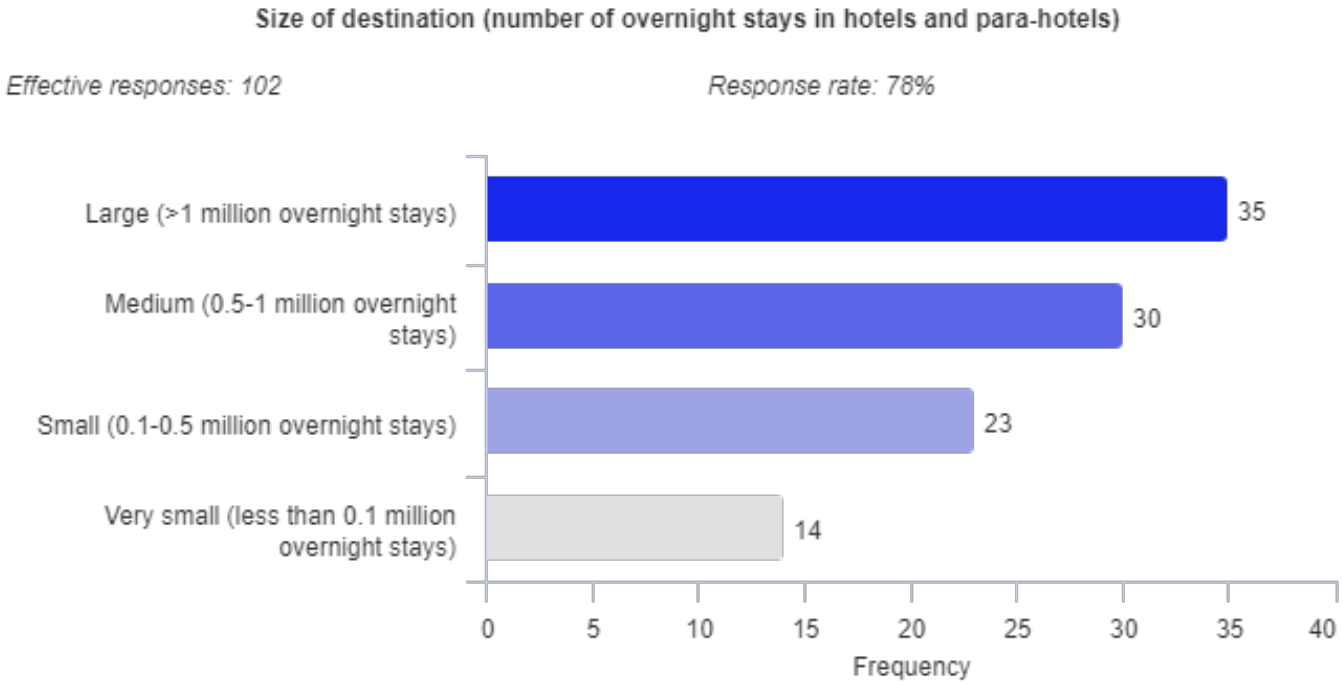


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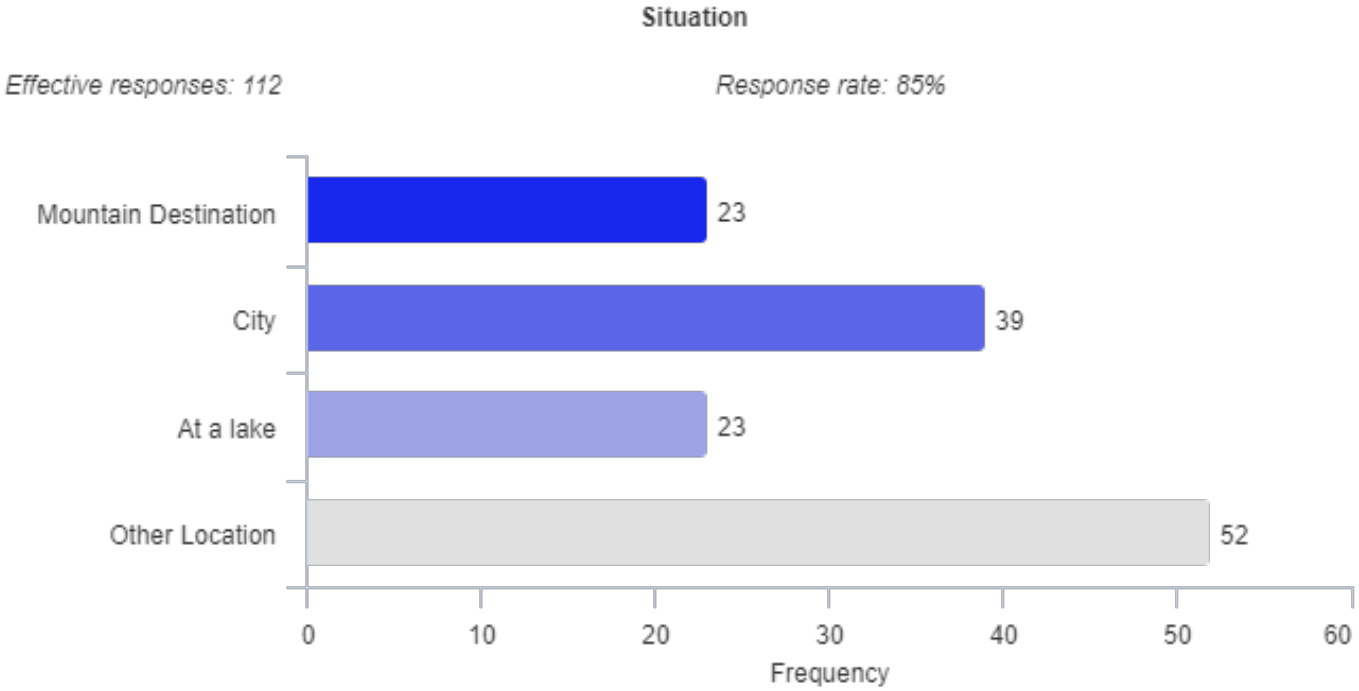




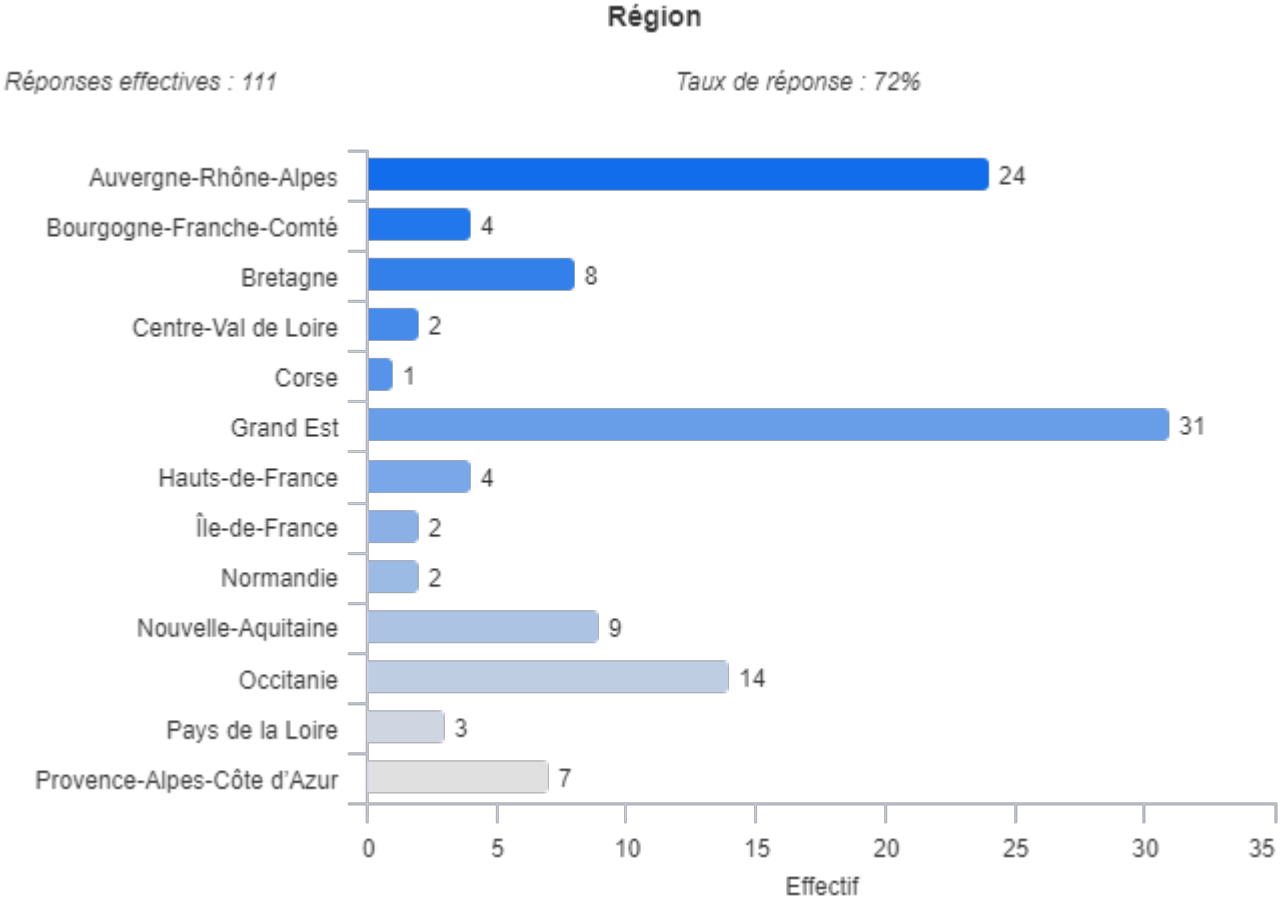
# France Sample: DMO Size



# France Sample: DMO Situation



# Sample France: Regions

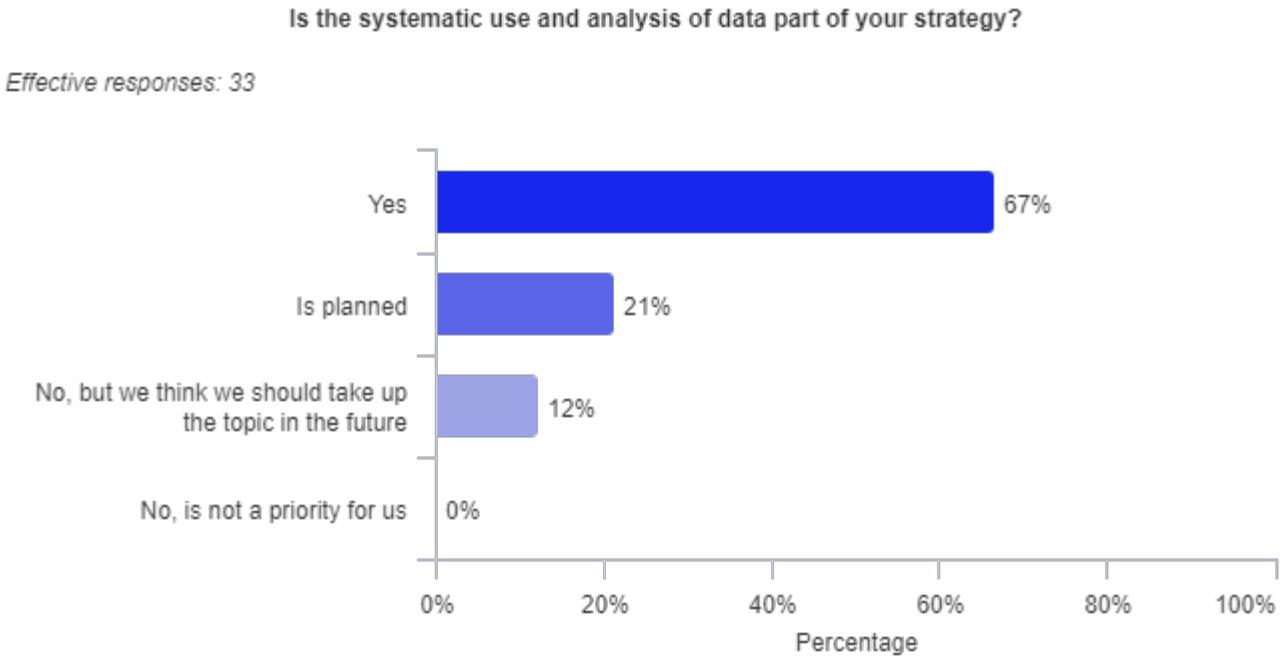


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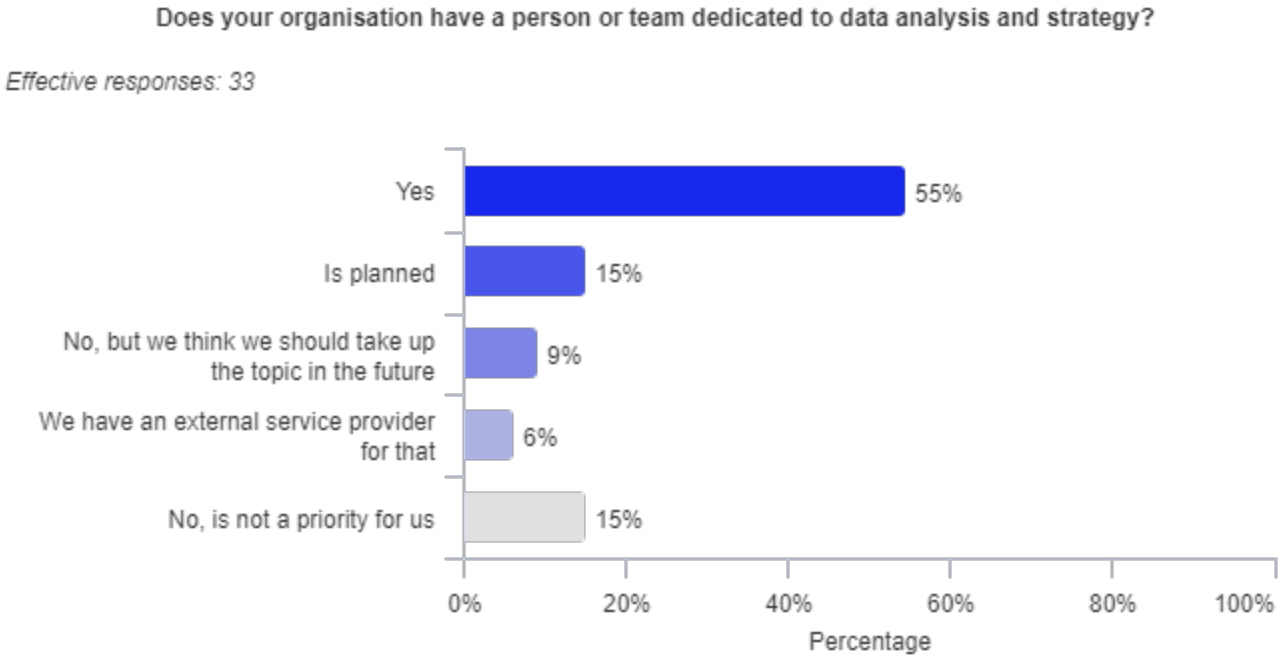
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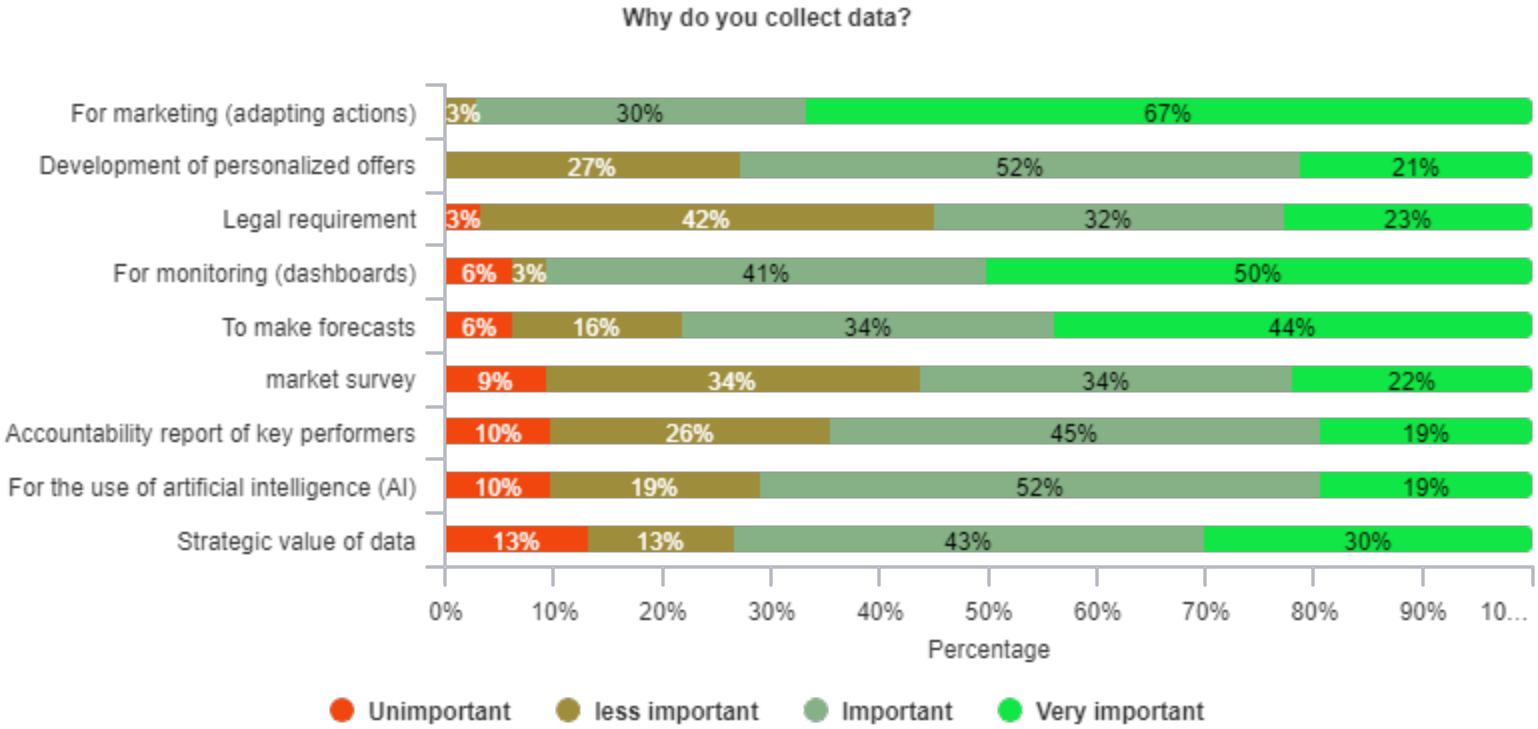
# Austria: The Role of Data in DMO Strategies



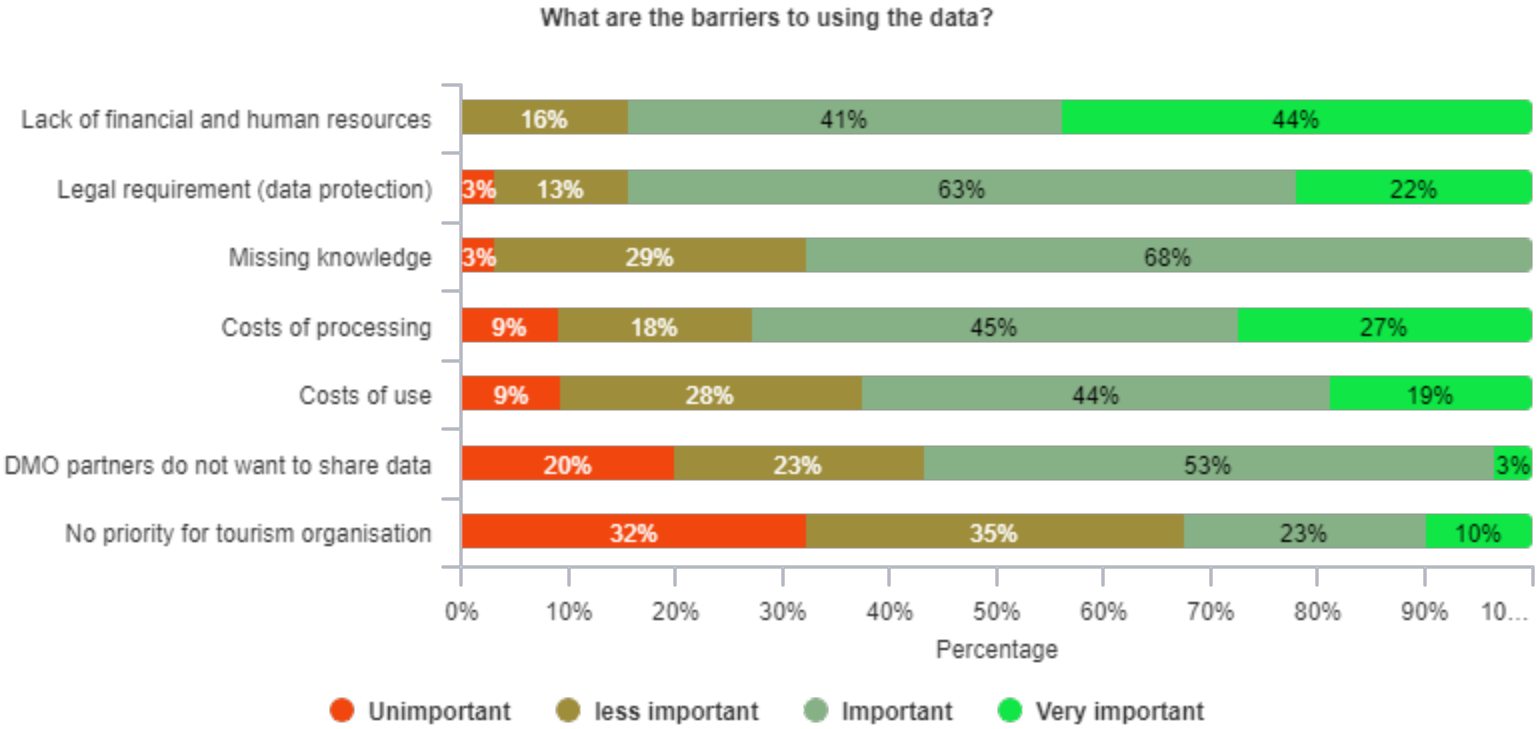
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# Austria: Objectives of Data Collection

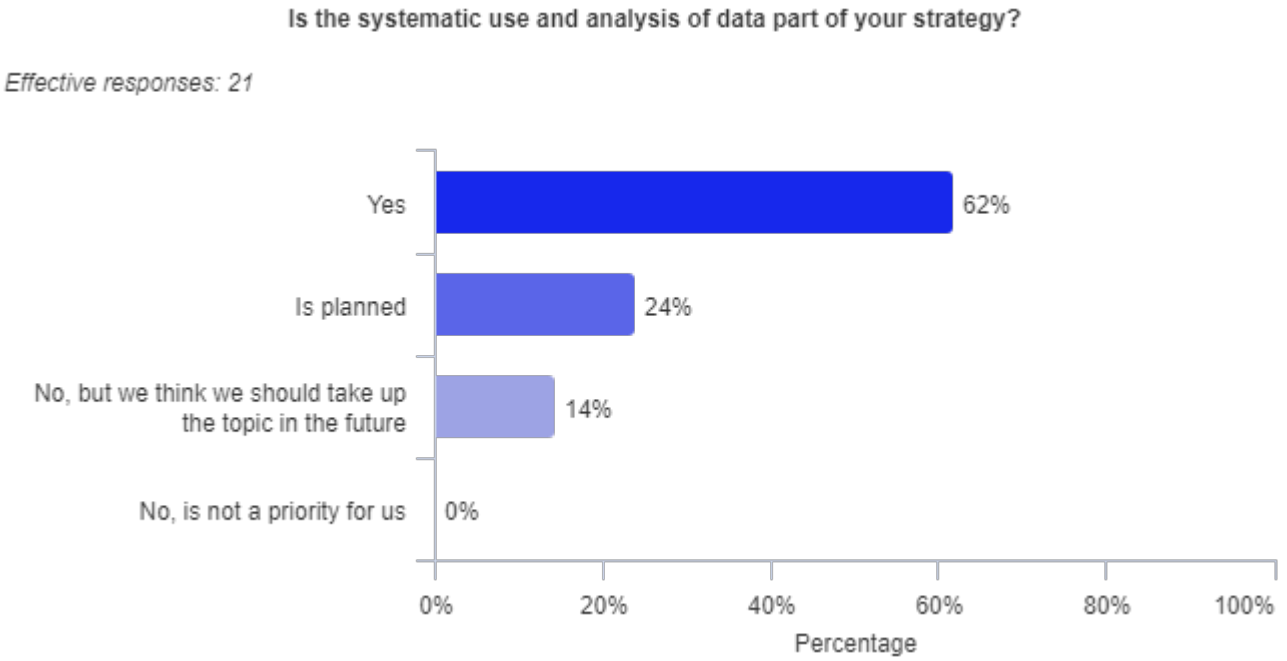


# Austria: Barriers to Data Use

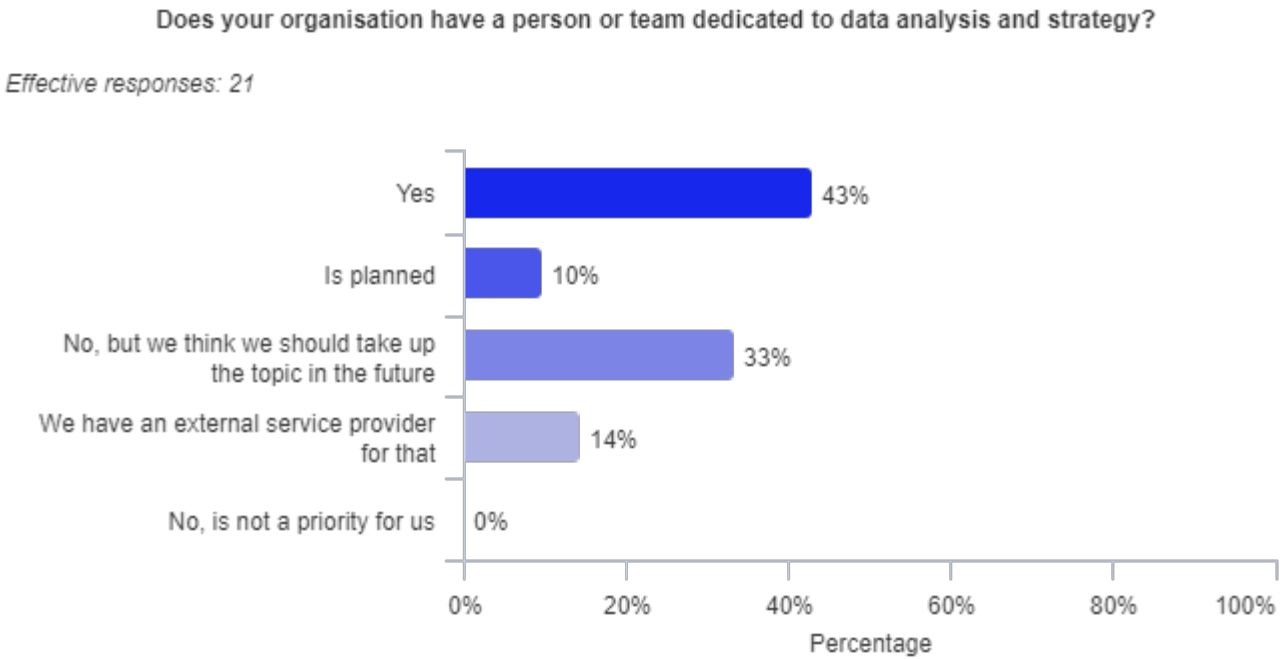




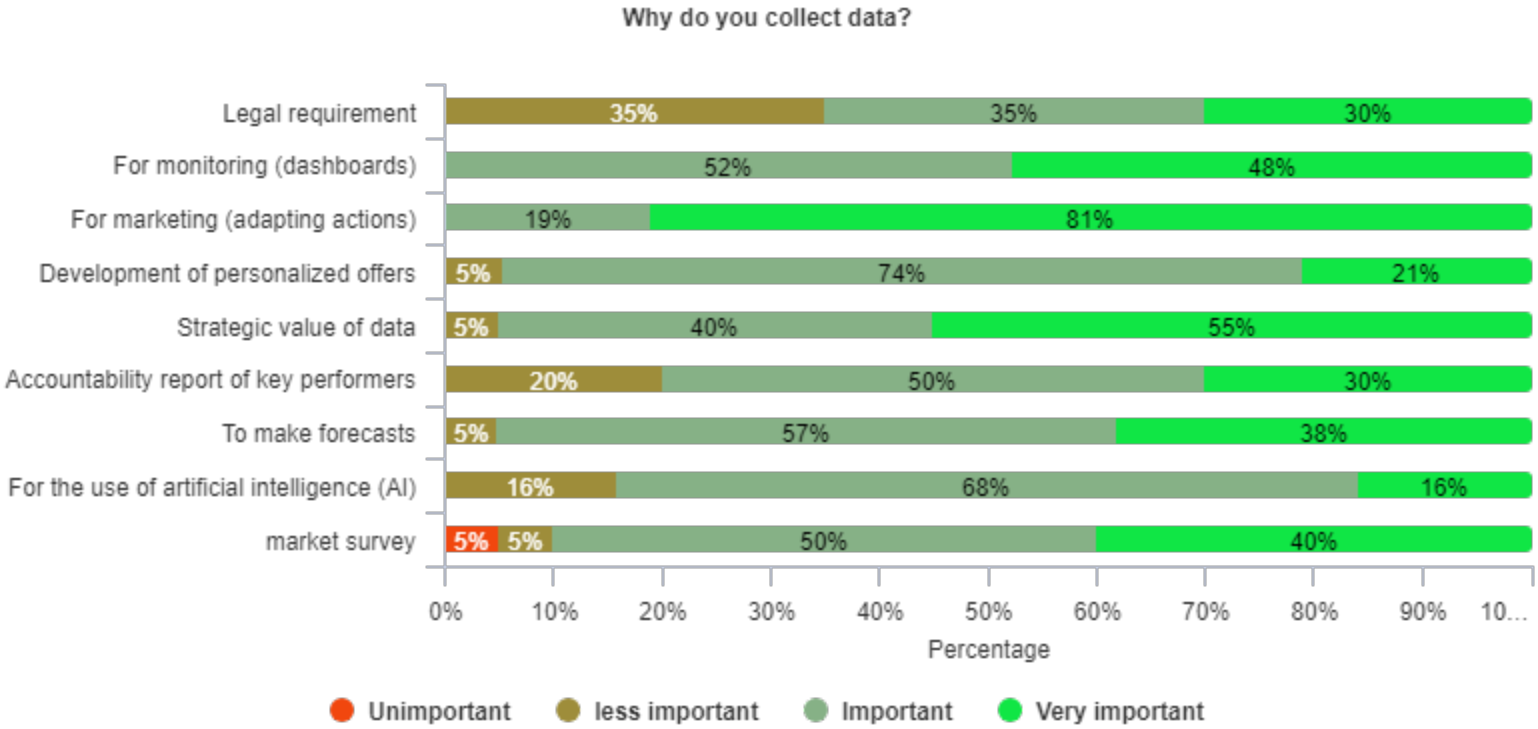
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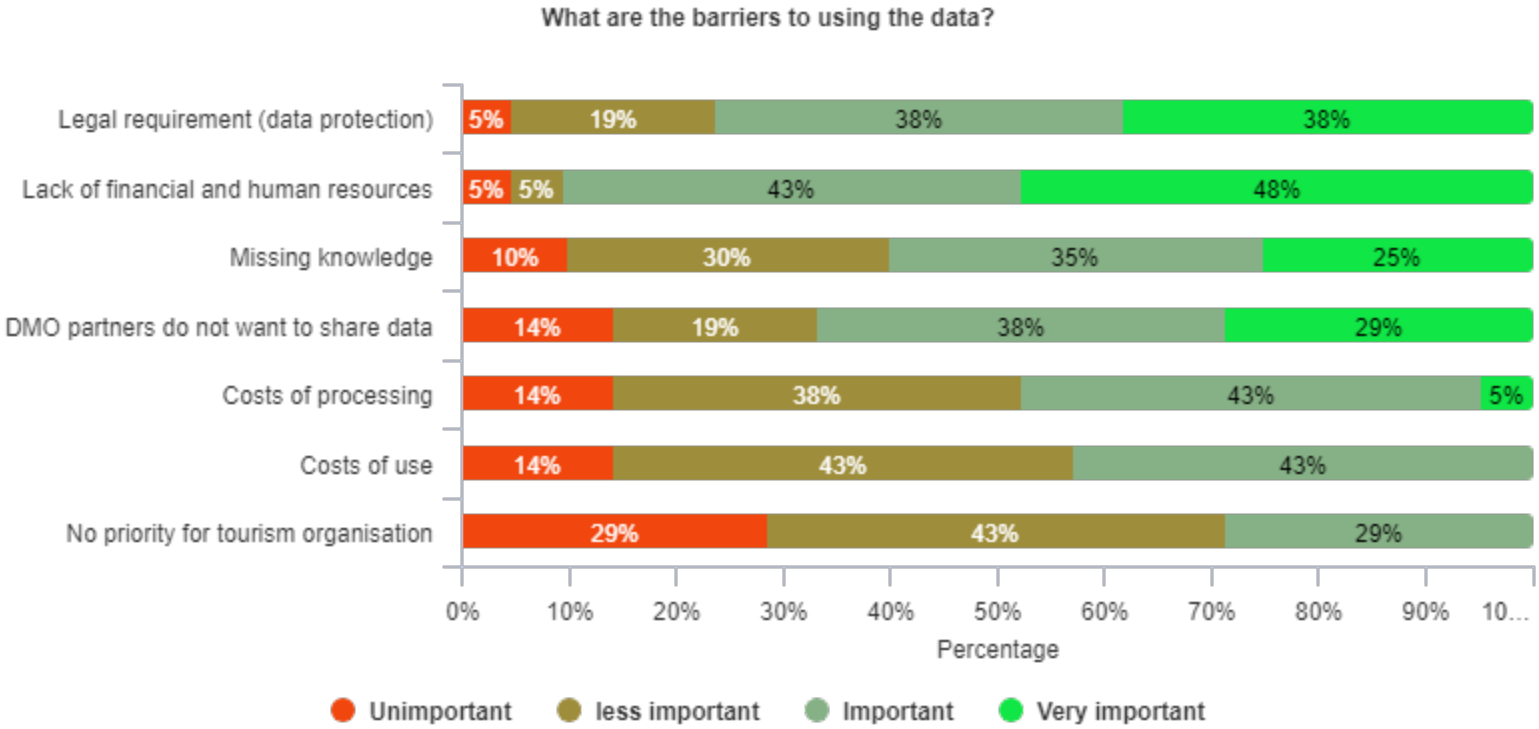
# Canada: Data-related organizations and resources



# Canada: Objectives of Data Collection

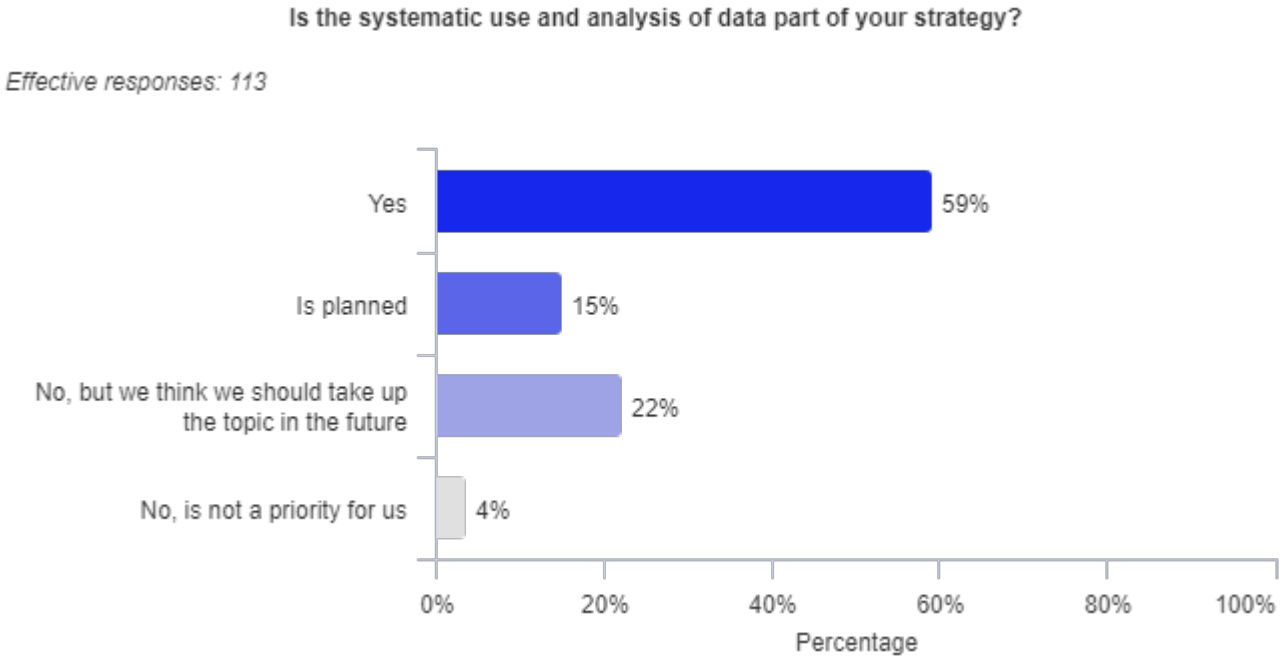


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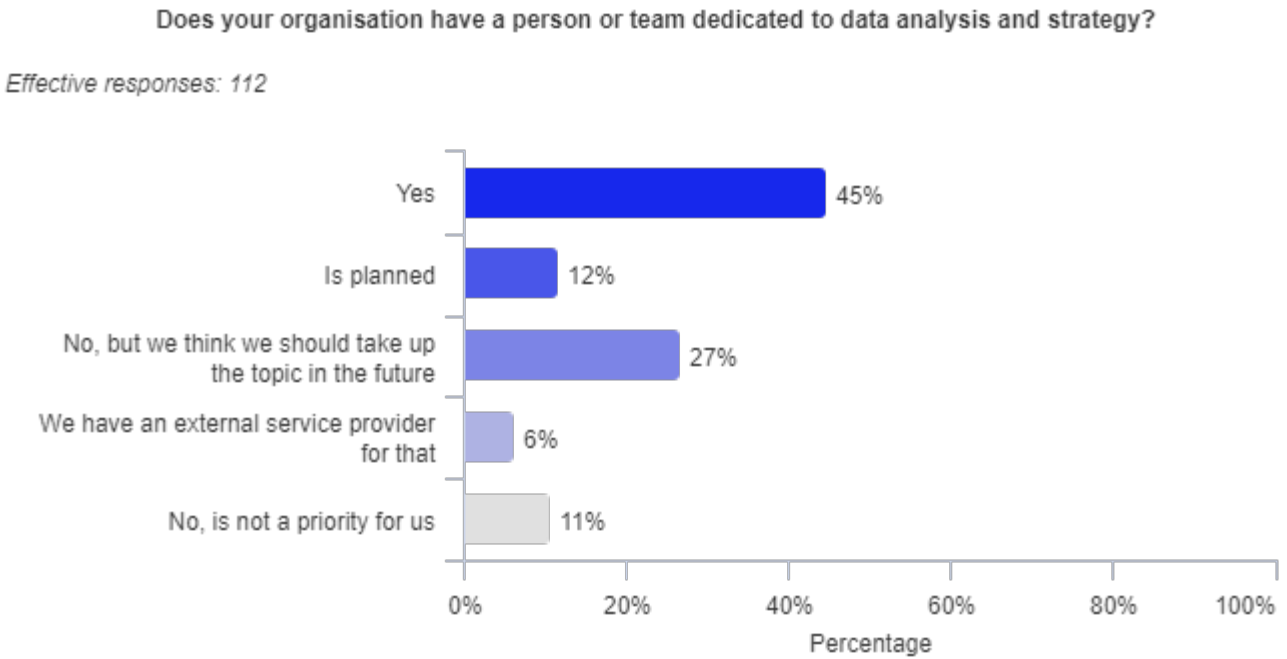




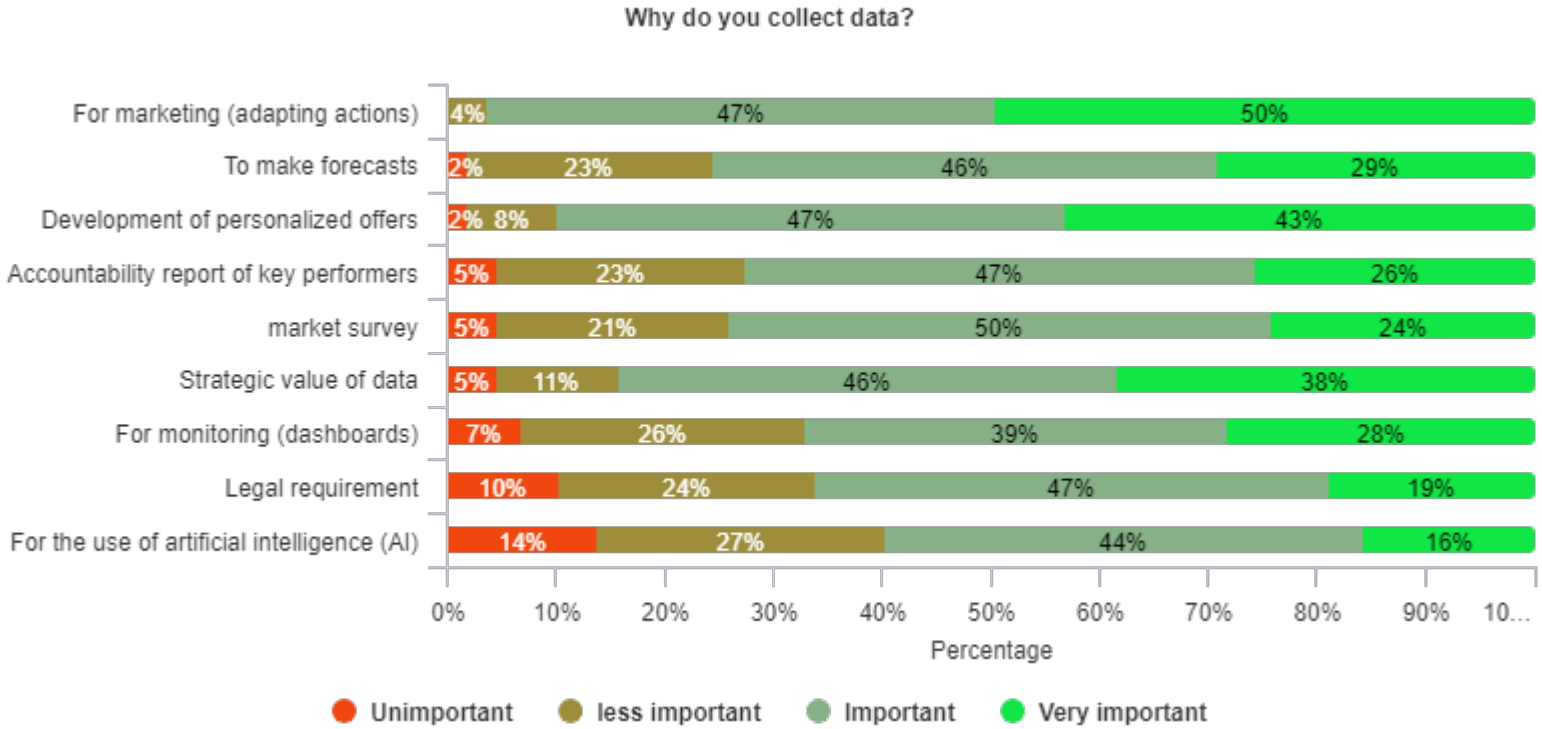
# France: The Role of Data in DMO Strategy



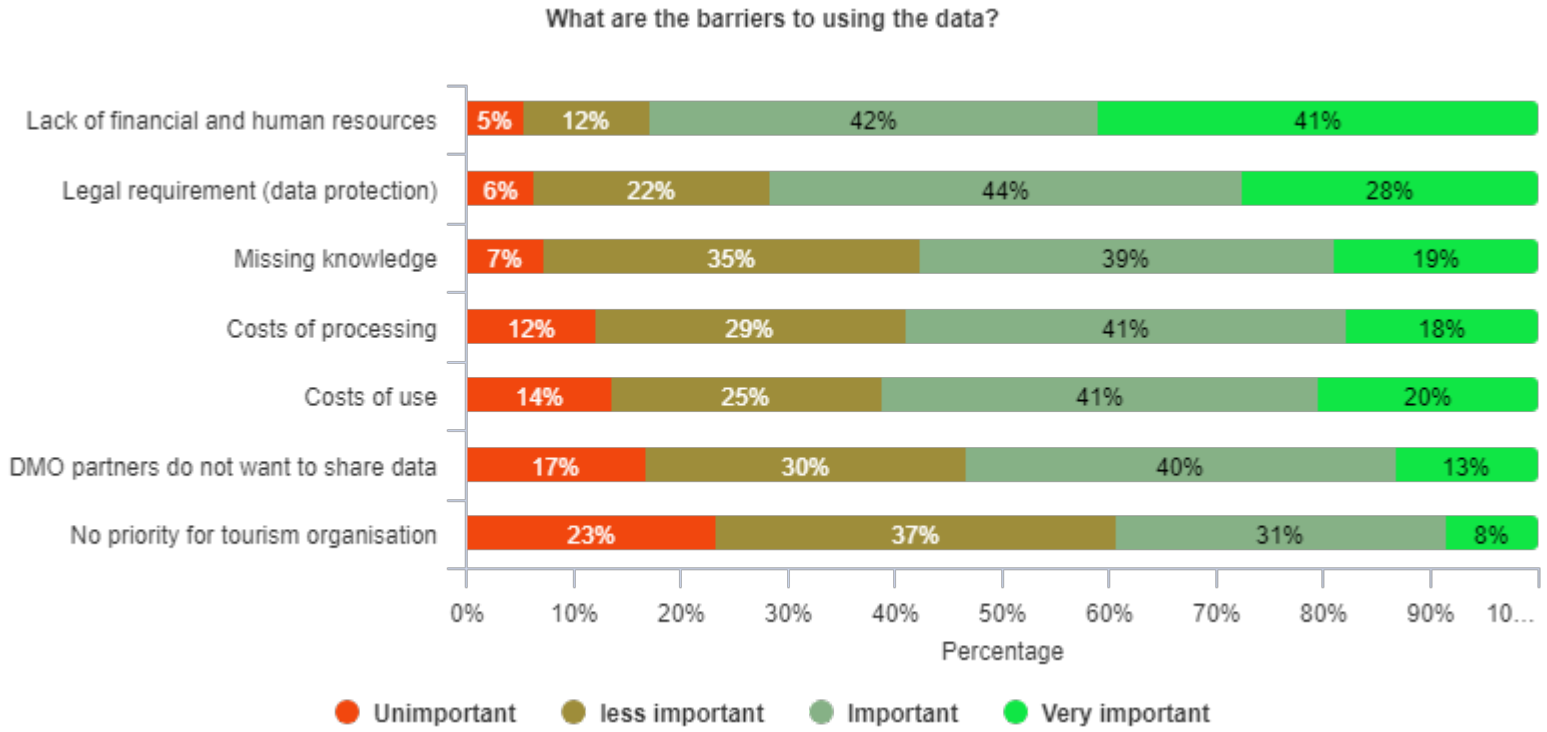
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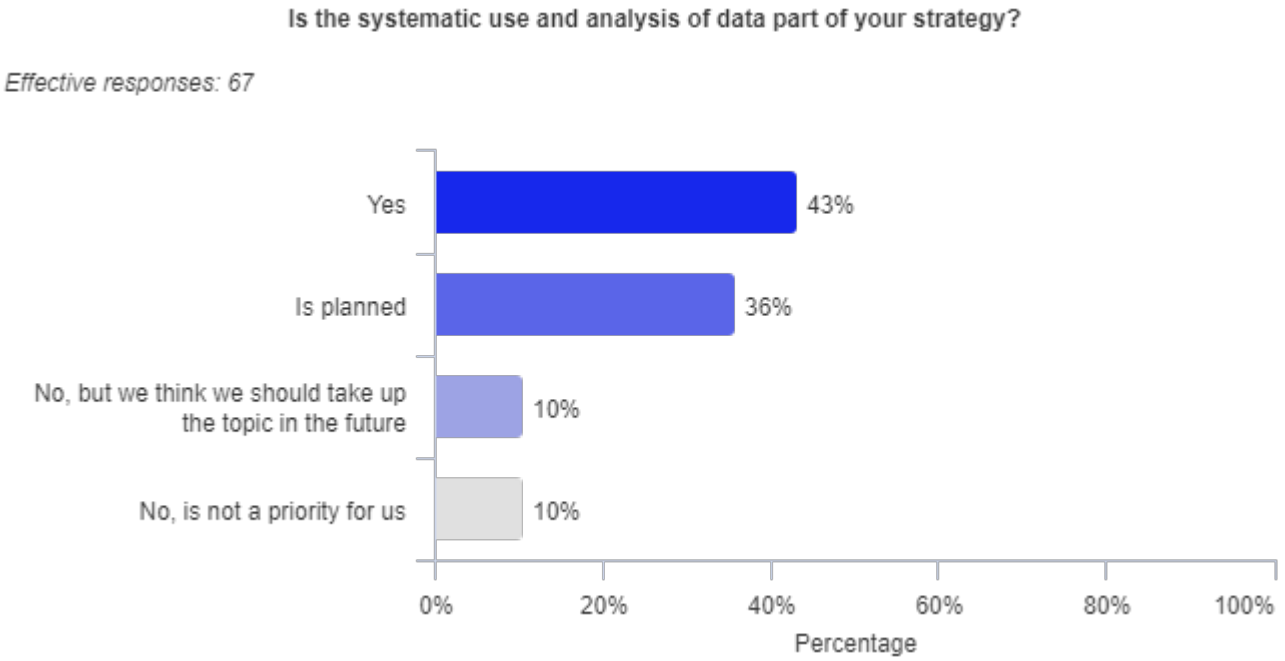


# France: Barriers to Data Use

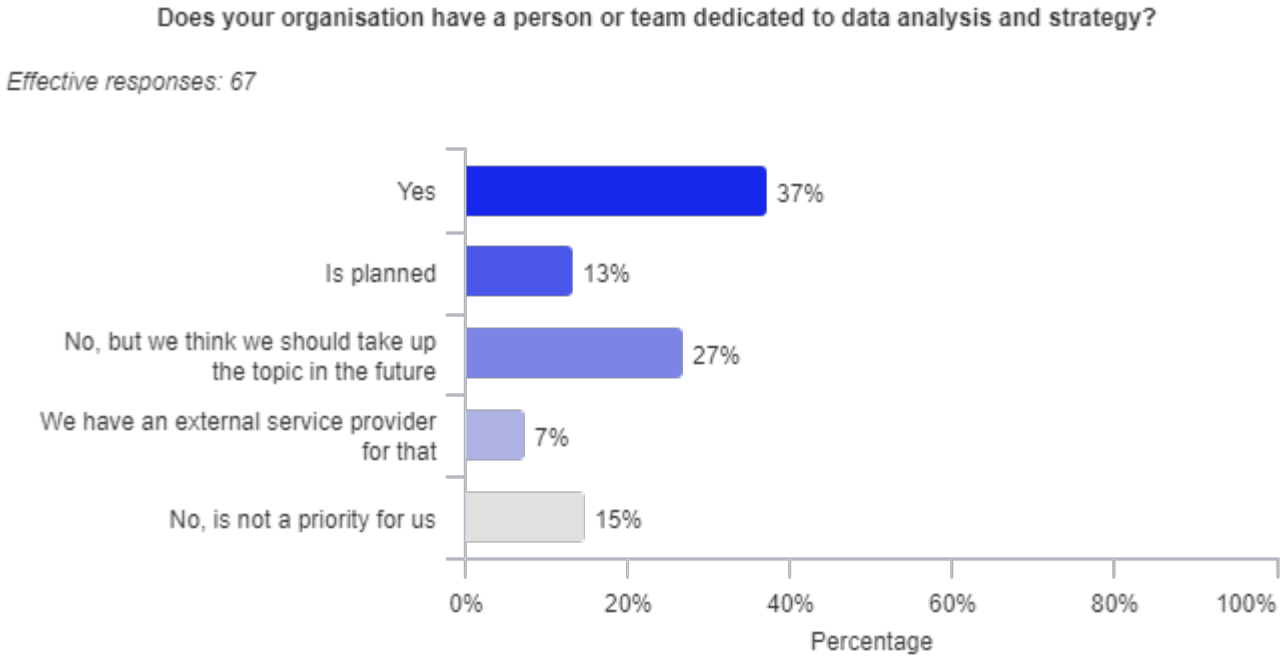




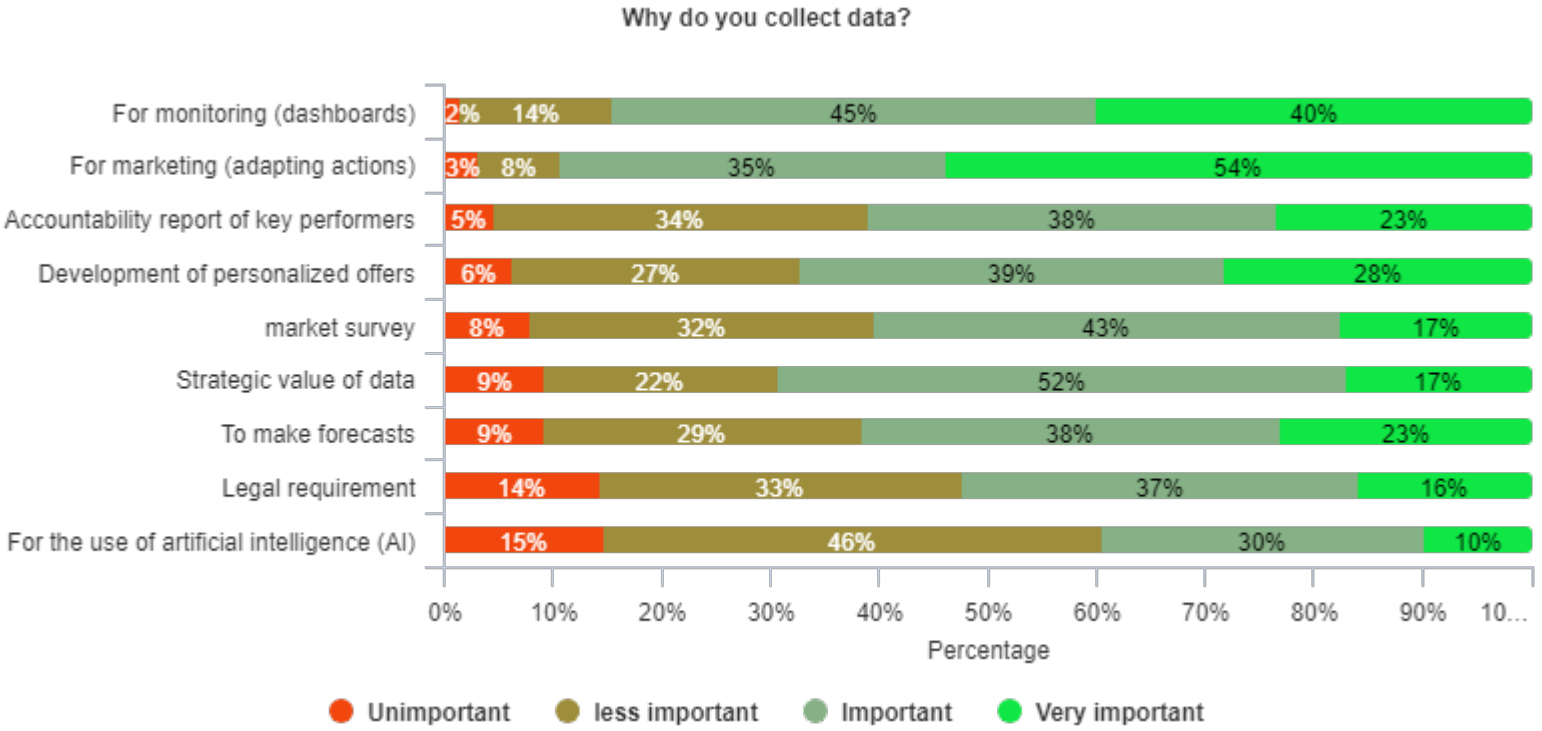
# Switzerland: The Role of Data in DMO Strategy



# Switzerland: Data Organization and Resources



# Switzerland: Objectives of Data Collection



# Switzerland: Barriers to Data Use

