Digital Transformation of Tourism Organizations in 2025

International Series of Surveys on DMOs (4 reports)

Report 1

Social Media and Distribution within Tourism Organizations (DMOs)

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

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Executive Summary (1) — Background

This study is based on an international survey conducted in 2025 among destination management organizations (DMOs) in four countries (Austria, Canada, France, Switzerland), 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 project (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-enabled 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) — Social Media

The results show very high adoption of digital tools, particularly social media. **Facebook** and **Instagram** are used almost universally, while LinkedIn, YouTube, and Google reviews also play a significant role. This presence is relatively consistent across countries and confirms a standardization of marketing practices.

Despite near-universal adoption, **social media generates little direct (measurable) traffic to DMO websites**. The median share of web traffic from social media is around 4%, which is one of the most striking findings of the study. The average is higher (≈11%), but it is driven by a limited number of particularly high-performing destinations.

Traffic to DMO websites varies significantly depending on the size of the destination, with larger DMOs naturally attracting much higher volumes. The websites play a central role in informing and guiding visitors, but do not consistently serve as a conversion channel.

Executive Summary (3) — Distribution

Finally, the results indicate that **most DMOs remain largely uninvolved in direct bookings of overnights**: a significant proportion do not manage bookings or redirect customers to external systems. The direct contribution to room nights is generally low, with a majority of organizations generating less than 1% of bookings.

The distribution analysis confirms a wide **variety of models**. Overall, DMOs primarily act as intermediaries or matching platforms, frequently relying on external booking systems. A significant proportion, however, is developing internal capabilities via DMS, particularly in major destinations.

The **size of DMOs is a determining factor**: larger organizations are more active in distribution, are more likely to have booking systems, and more frequently act as intermediaries. Conversely, smaller DMOs more often adopt a non-transactional approach and rely on external partners.

Differences between countries are marked and can be partly explained by the level of DMS system integration. These results reflect not only varying levels of maturity but also distinct strategic choices and institutional frameworks. In some contexts, DMOs have historically been focused on promotion and are not intended to intervene directly in the transaction.

Overall, DMOs appear primarily as actors in generating and directing demand. Their role in distribution remains variable and depends heavily on size, the national context, and the degree of integration of technological systems.

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International Context of the Study

Since 2015, HES-SO Valais-Wallis has been analyzing the digital transformation of tourism organizations, particularly 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 enables:

- 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 (this **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 (see details in annex):

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 intermediary or distributor).

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

III. **Data usage and management**: Assessment of data integration into DMOs' 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).

Method – 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 (n). The results should therefore be interpreted with these sample differences in mind.

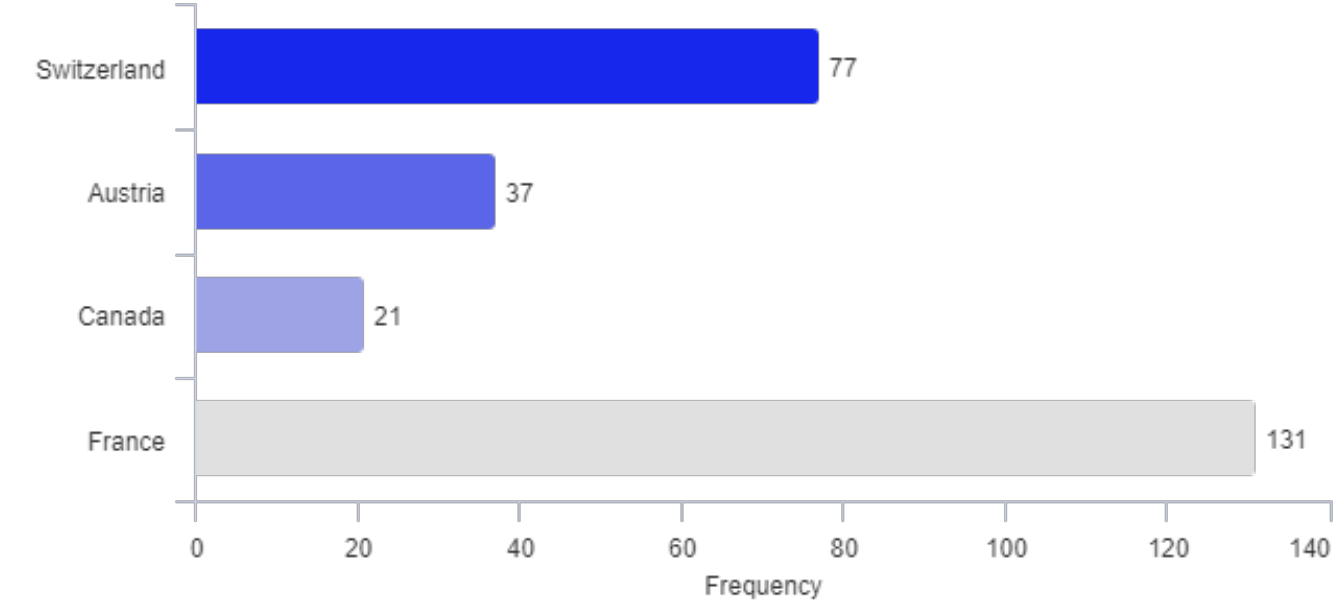
Furthermore, certain comparative analyses are influenced by the composition of the national samples, particularly in terms of the size and type of DMOs.

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

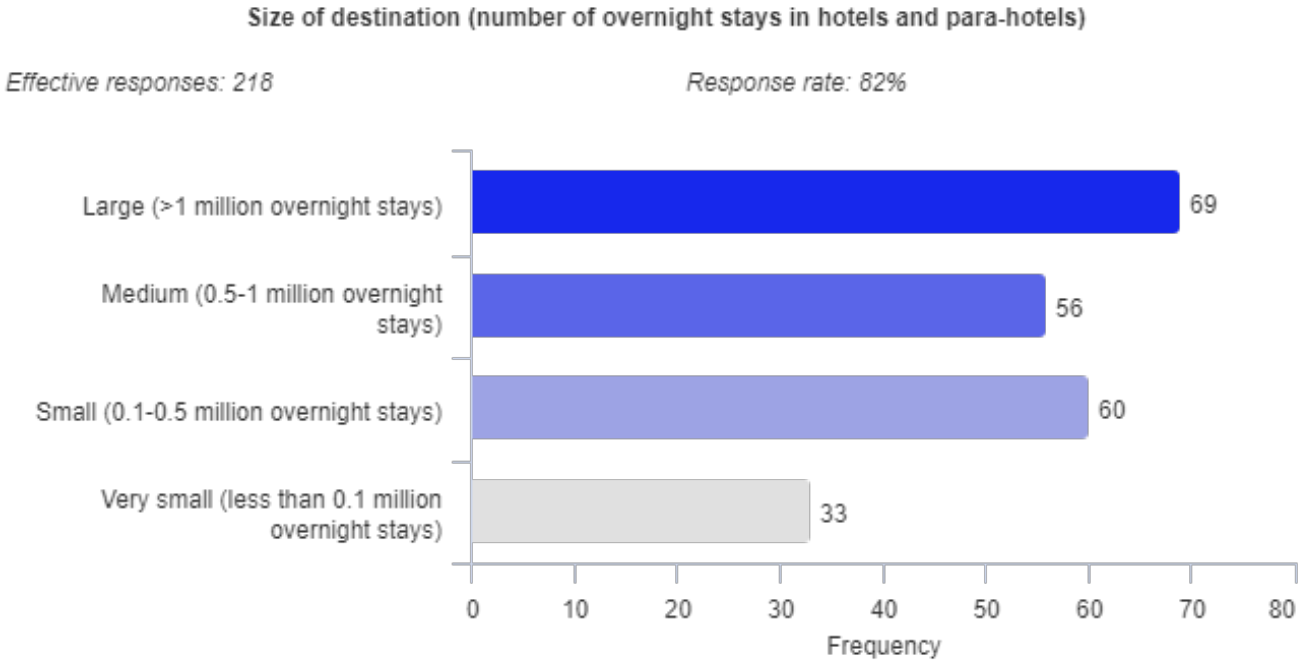
Sample: Country

Effective responses: 266

Response rate: 100%



Sample: DMO size



Sample: DMO Situation

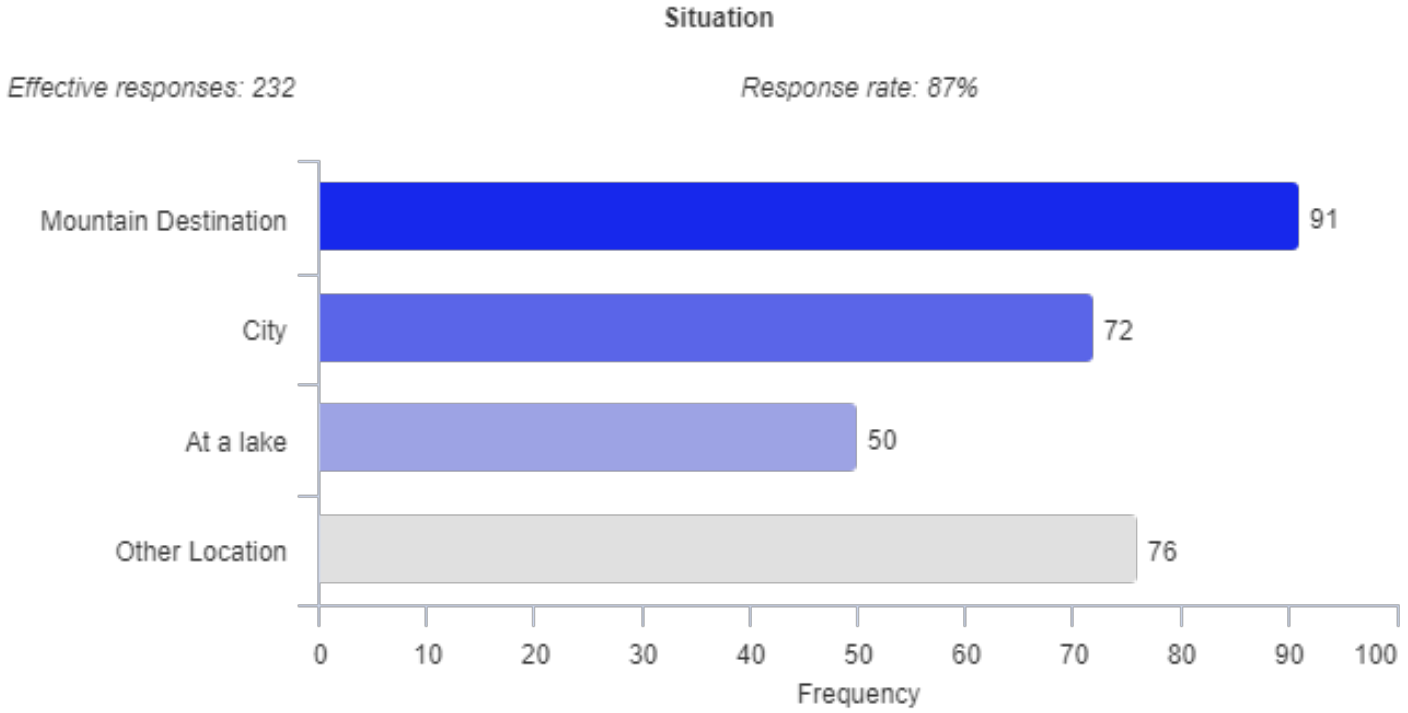
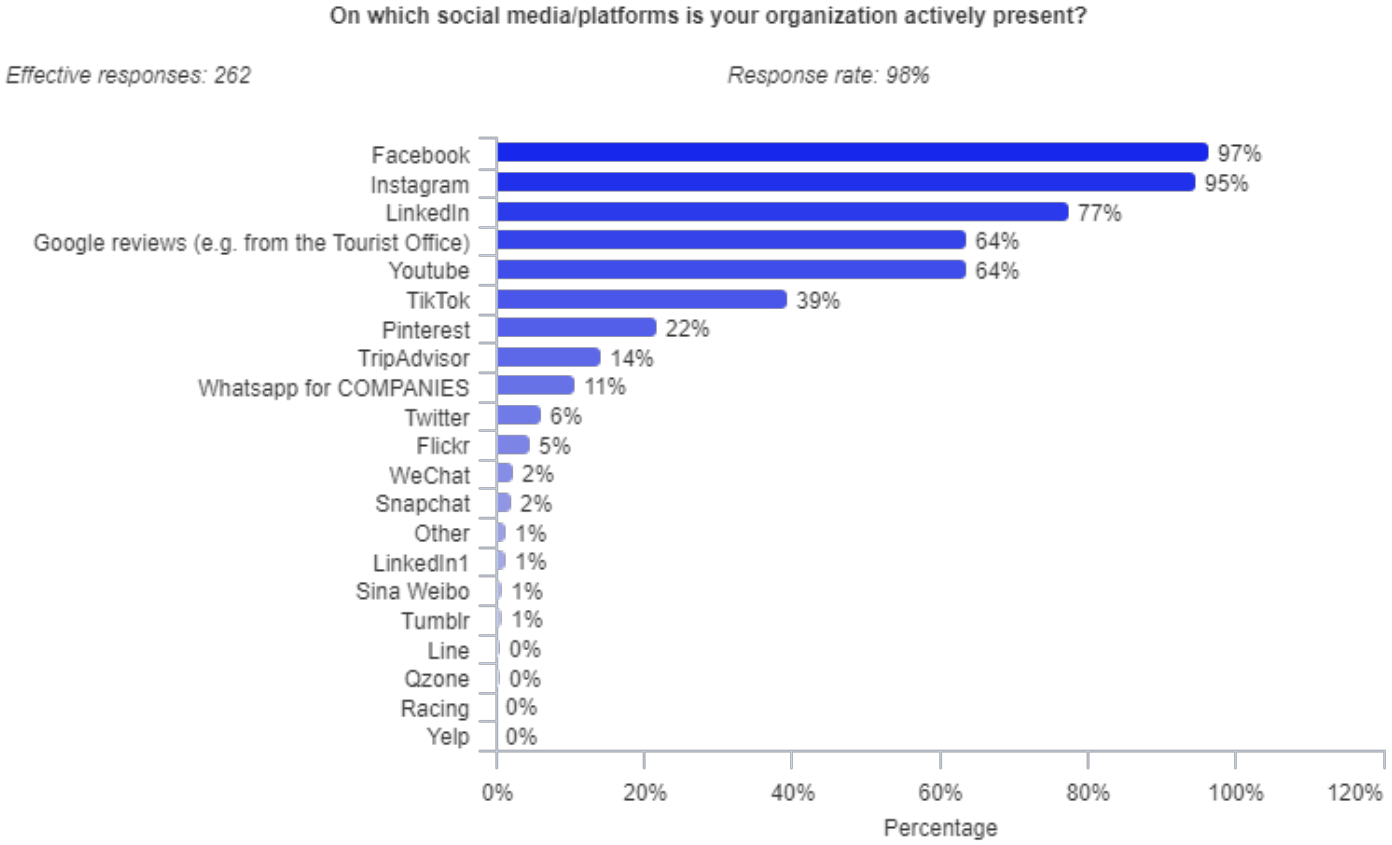


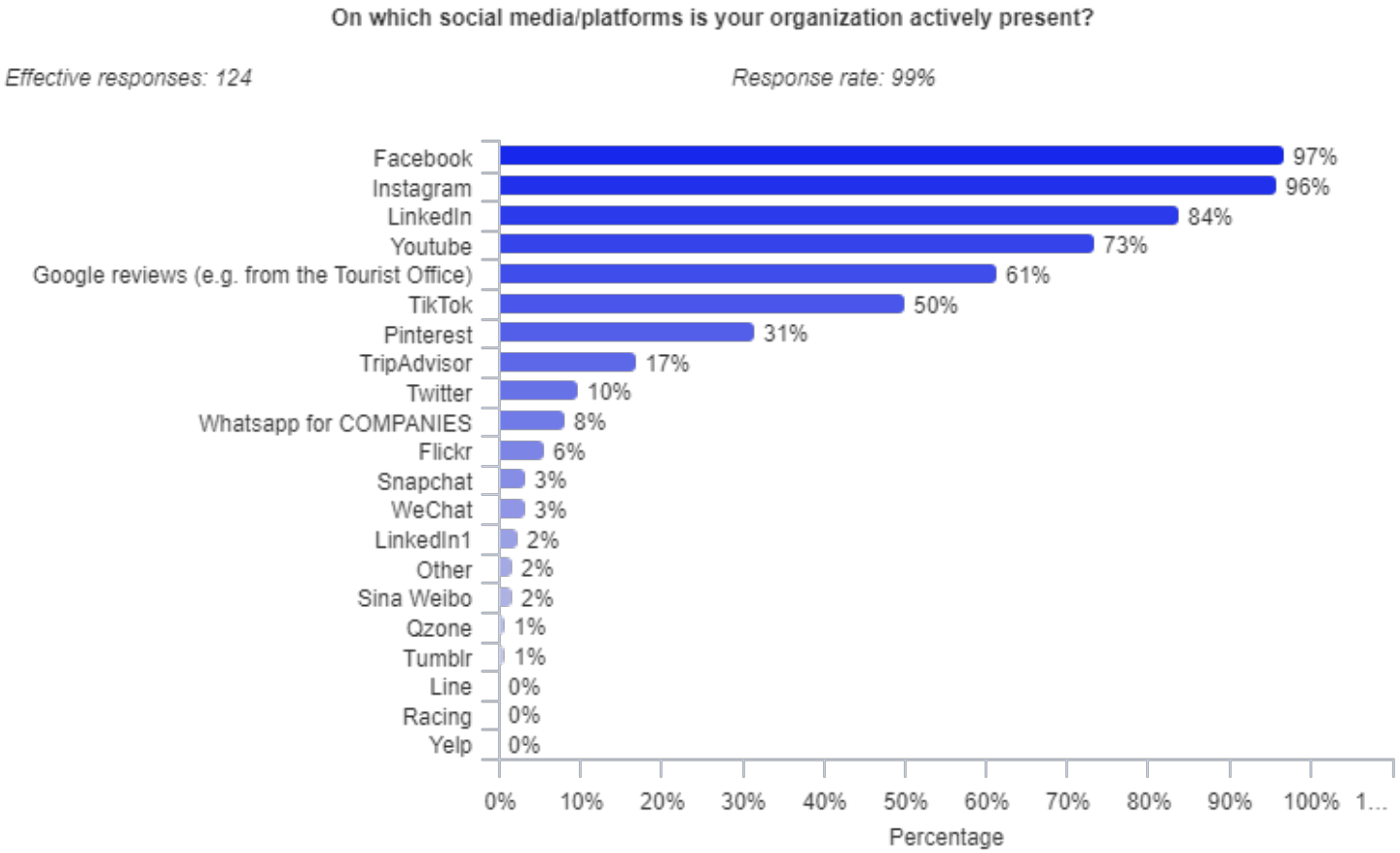
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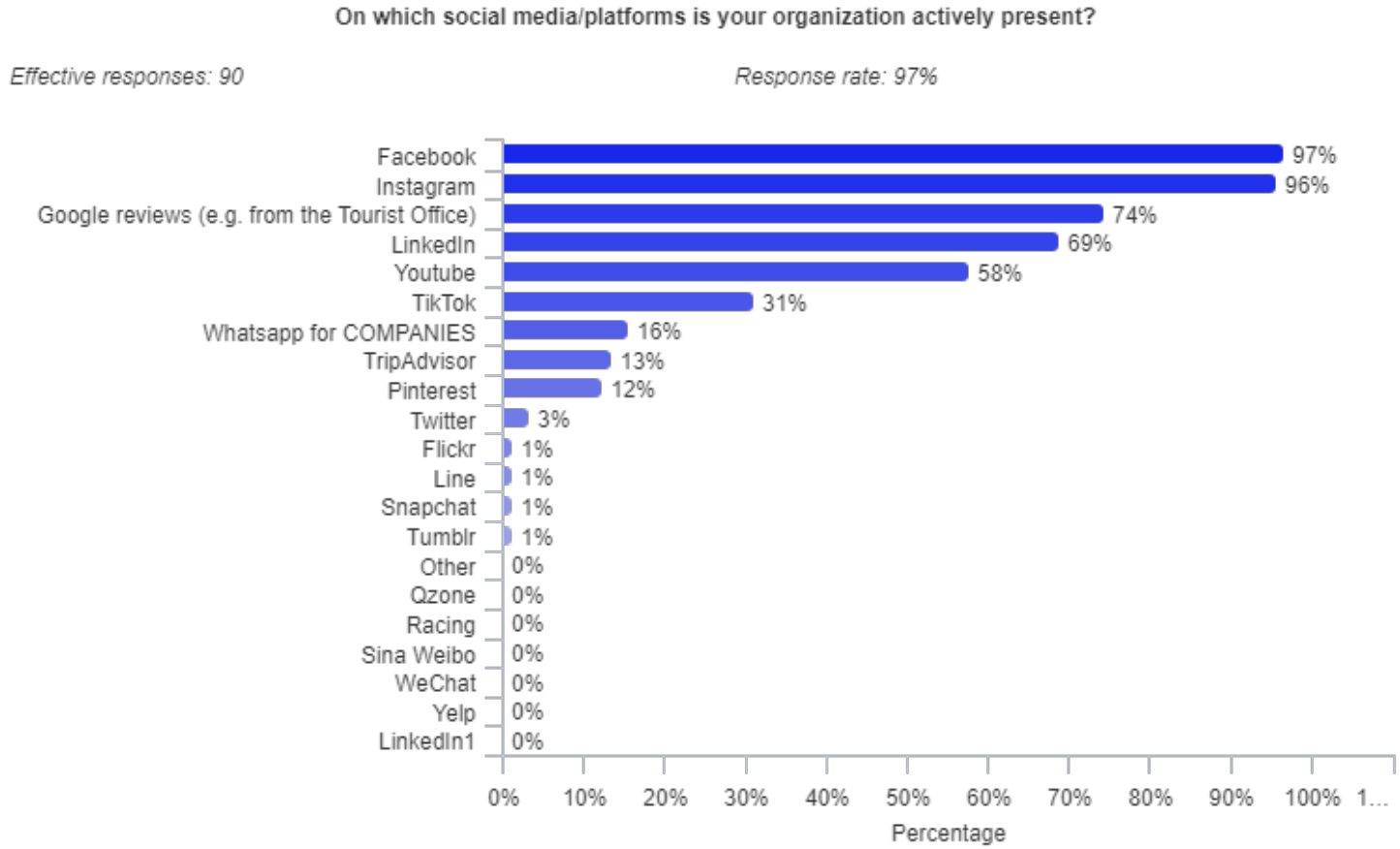
Use of Social Media in DMOs in 2025 (Global Sample, 4 Countries)



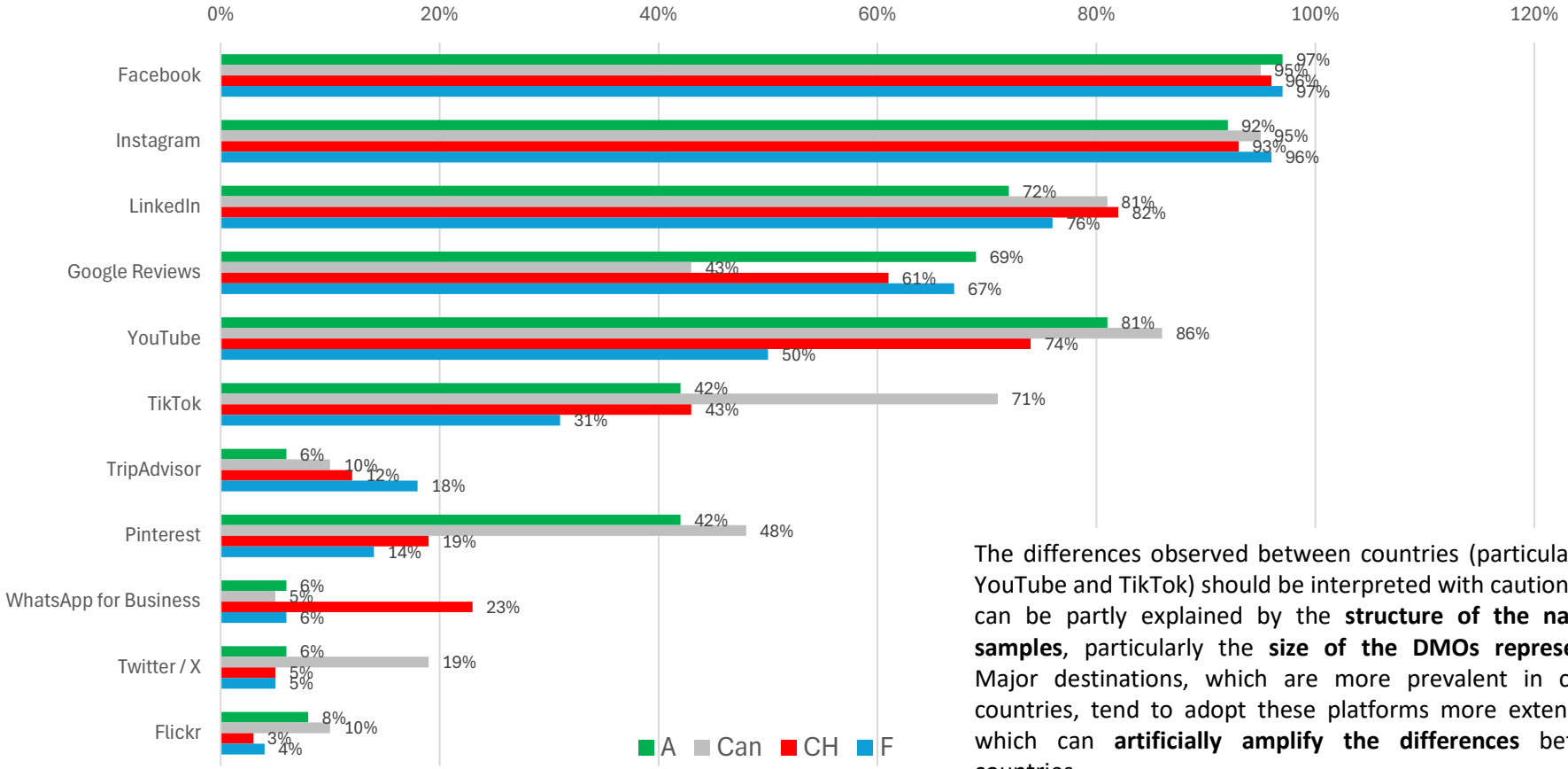
Use of Social Media by Major DMOs in 2025 (Global Sample, 4 Countries, DMOs with >500,000 Overnight Stays)



Use of Social Media in Small DMOs in 2025 (Global Sample, 4 Countries, DMOs with < 500,000 Overnight Stays)

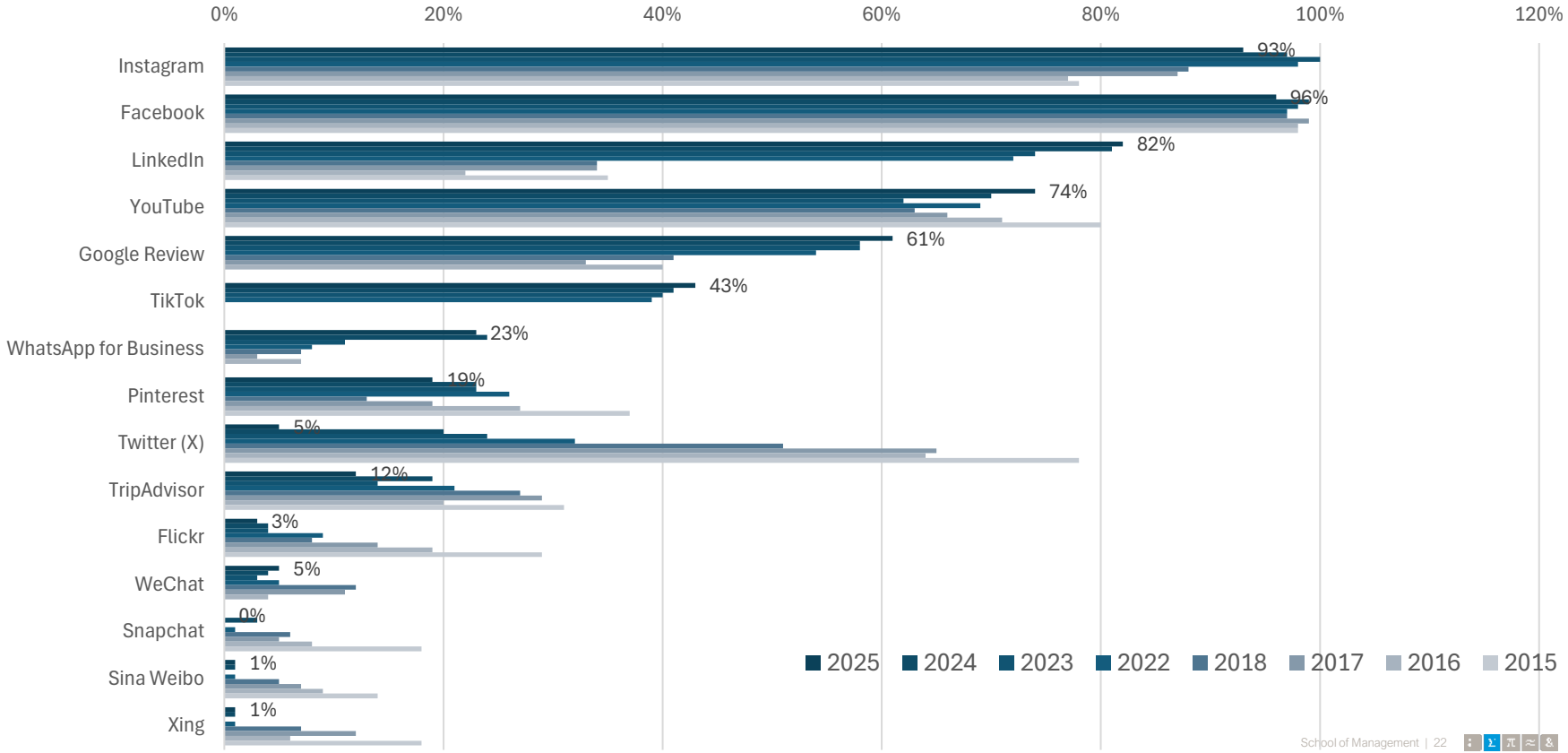


Use of Major Social Media Platforms in DMOs in 2025: A Country-by-Country Comparison



The differences observed between countries (particularly on YouTube and TikTok) should be interpreted with caution. They can be partly explained by the **structure of the national samples**, particularly the **size of the DMOs represented**. Major destinations, which are more prevalent in certain countries, tend to adopt these platforms more extensively, which can **artificially amplify the differences** between countries.

Trends in Social Media Use Among Swiss DMOs Between 2015 and 2025



Trends in Social Media Use (I)

A combined analysis of international results and trends observed in Switzerland between 2015 and 2025 reveals a dual dynamic: a strong **convergence of practices** across countries today, and a **process of gradual maturation of** DMOs' **digital strategies** over the past decade.

Across the four countries, the results show that a **common set of platforms** has emerged. **Facebook** and **Instagram** have become nearly universal, complemented by **LinkedIn**, **YouTube**, and **Google reviews.** This standardization reflects an **alignment of DMOs with the major dominant ecosystems**, with practices now largely homogeneous in terms of digital presence. Differences between countries no longer lie so much in the platforms used as in the intensity of use and the degree of innovation, with some markets, such as Canada, proving more advanced in adopting emerging formats like TikTok, while others, such as Switzerland, maintain a more structured and gradual approach.

This current convergence is largely explained by the evolution observed in Switzerland over the past decade, which serves as a good indicator of the sector's trajectory. In 2015, social media was still used only partially and experimentally, with a heavy reliance on Facebook. Over time, the ecosystem has expanded and become more professional: Instagram has established itself as a central channel, LinkedIn has emerged as a strategic tool, YouTube and video content have gained importance, and platforms related to online reputation—particularly Google—have become part of standard practice.

Trends in Social Media Use (II)

At the same time, **certain legacy platforms have lost relevance**, reflecting a streamlining of channel portfolios, as evidenced by the sharp decline in **Twitter/X** and **Flickr**, which are now rarely used by DMOs. Conversely, resources are gradually being reallocated to more engaging and effective platforms such as Instagram, YouTube, and TikTok.

Thus, the 2025 international results should not be interpreted as a static state, but as the culmination of a transformation process. DMOs in the four countries have generally reached a high level of maturity, characterized by widespread presence on key platforms and the growing integration of social media into their marketing, visibility, and—indirectly—distribution strategies.

Ultimately, the past decade shows that social media has shifted from a complementary role to a central one in DMOs' strategies. The challenge for the coming years will no longer be the adoption of these platforms—which is now a given—but the **ability to derive a competitive advantage from them**, particularly in terms of content, engagement, and integration with data analytics and artificial intelligence.

Trends in Social Media Use (III)

Analysis by DMO size provides additional insight into the overall picture and confirms that, beyond differences between countries, the size of destinations is a key factor shaping social media strategies.

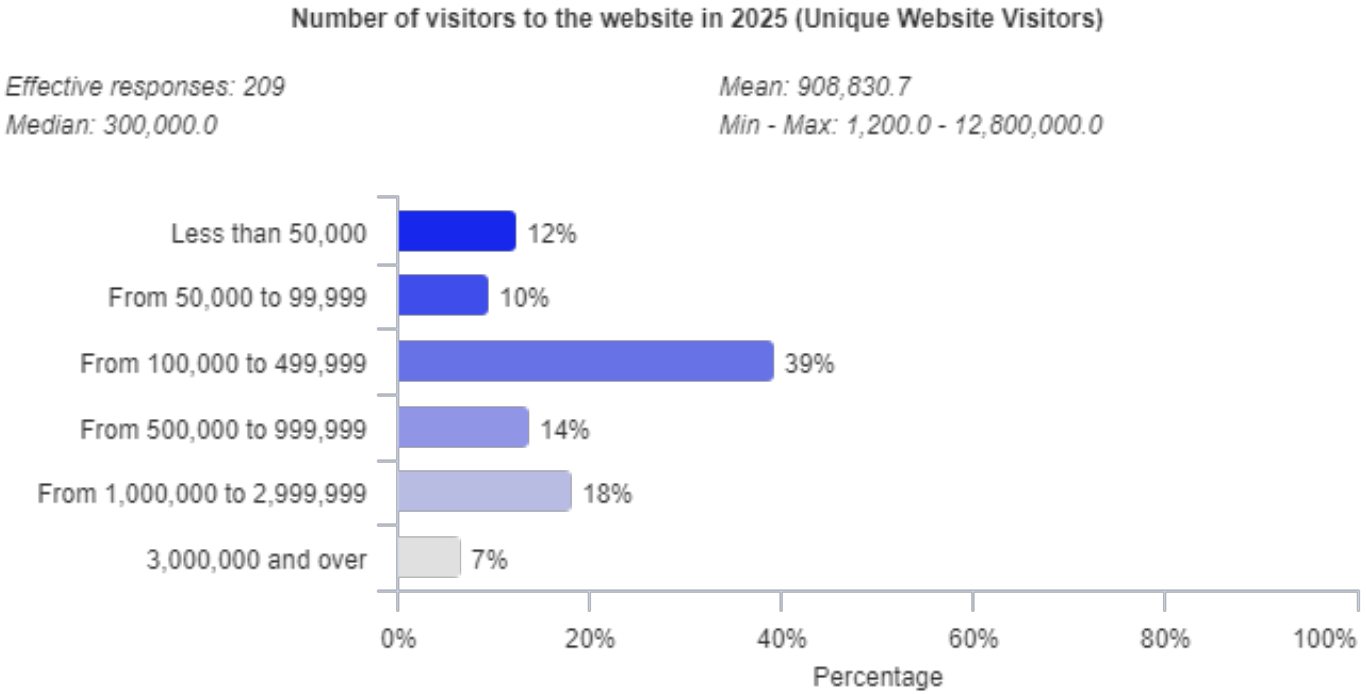
While **dominant platforms such as Facebook and Instagram are used almost universally**, regardless of the segment, **significant differences emerge when considering secondary and emerging platforms**. Large DMOs (over 500,000 overnight stays) exhibit a more diversified and intensive presence, with significantly higher usage of LinkedIn, YouTube, and especially TikTok. The latter reaches approximately 50% in this segment, compared to just over 30% for small DMOs, reflecting the greater capacity of large organizations to invest in innovative and more resource-intensive formats.

Similarly, visual or content platforms (YouTube, Pinterest) as well as certain tools related to reputation or indirect distribution (Google, TripAdvisor) are more frequently utilized by major destinations. This reflects more sophisticated marketing strategies, integrating content production, branding, and e-reputation management on a larger scale.

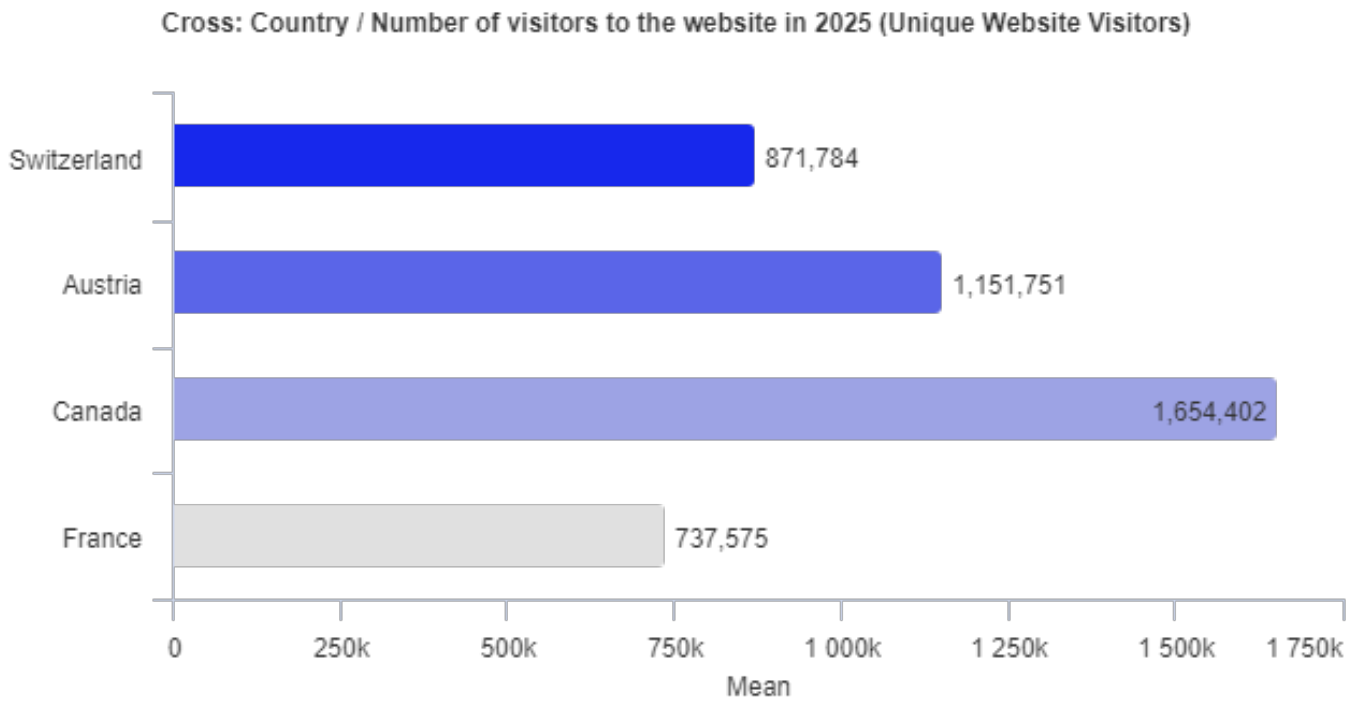
Conversely, smaller DMOs adopt more focused strategies, concentrating on a limited number of high-reach platforms, primarily Facebook and Instagram, and to a lesser extent Google and LinkedIn. The adoption of emerging platforms is more cautious among these organizations, likely due to resource constraints (time, skills, budget) and a more uncertain return on investment.

Thus, this analysis confirms that the differences observed in the overall results or between countries are largely explained by the structure of the samples and, in particular, by the size of the DMOs.

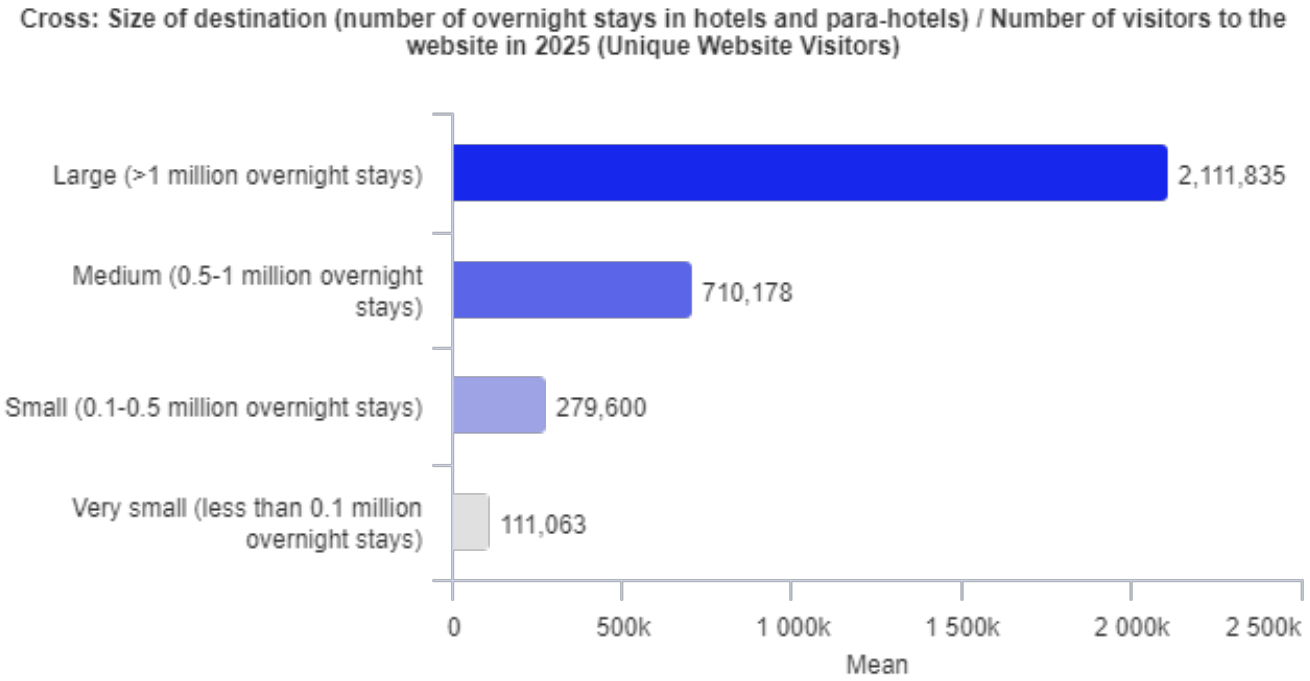
Number of website visitors in 2025



Number of website visitors in 2025 by country



Number of website visitors in 2025 by DMO size



n=59

n=53

n=48

n=25

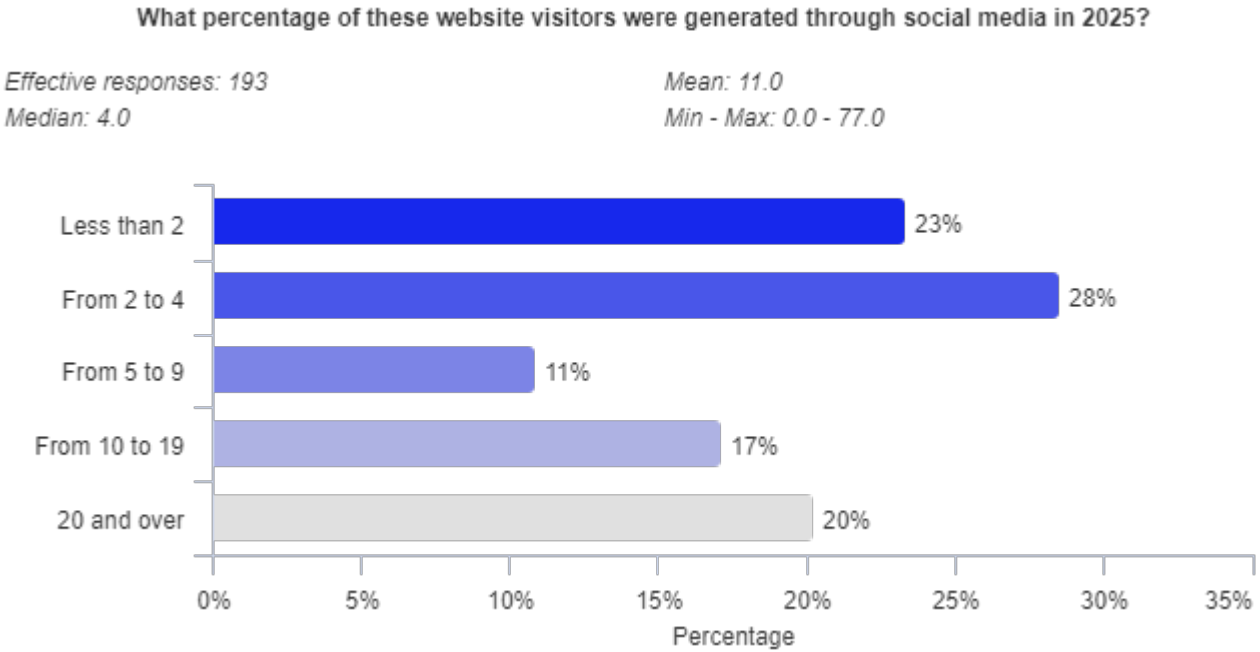
Number of visitors to DMO websites in 2025

The results reveal, above all, significant variation in visitor numbers, with a median of 300,000 visitors and an average of nearly 900,000, reflecting a highly asymmetrical structure dominated by a few major destinations generating high volumes. However, the majority of DMOs fall into intermediate segments, particularly between 100,000 and 500,000 visitors, confirming that the tourism sector remains largely composed of medium-sized organizations.

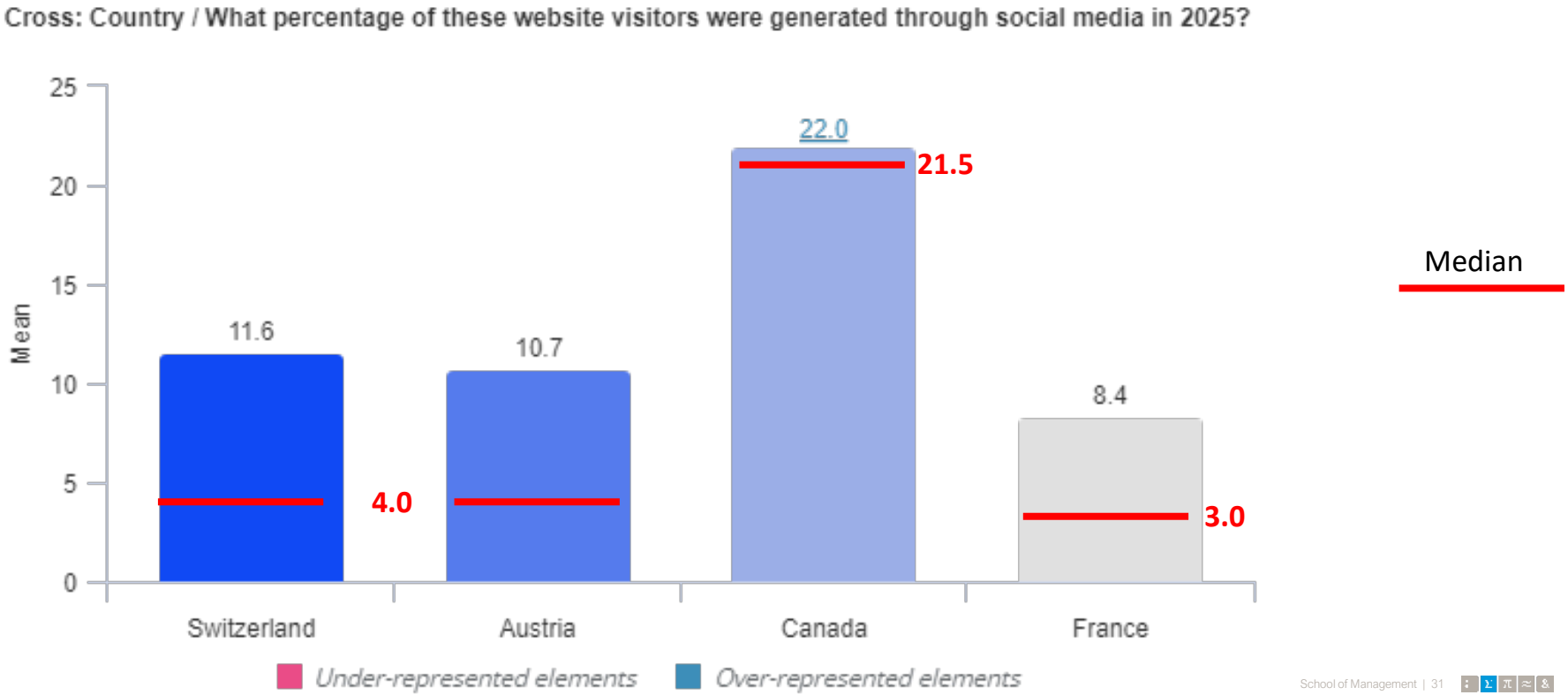
The analysis by country reveals apparent disparities, with higher average levels in Canada and Austria than in Switzerland and France. However, these differences should be interpreted with caution, as they largely reflect the composition of the national samples. Indeed, the structure of the surveyed DMOs varies significantly from one country to another, particularly in terms of destination size. Austria has a relative overrepresentation of large destinations, while Switzerland has more small-scale organizations, which automatically contributes to lower average visitor numbers.

This relationship is clearly confirmed by the analysis by DMO size: the number of visitors increases very markedly with the size of the destination, rising from approximately 100,000 visitors for the smallest organizations to over 2 million for the largest. Size is thus the primary factor explaining web traffic, far more so than the country effect. The differences observed between countries are therefore largely structural and related to the composition of the samples, as also confirmed by the statistically significant correlation between country and destination size.

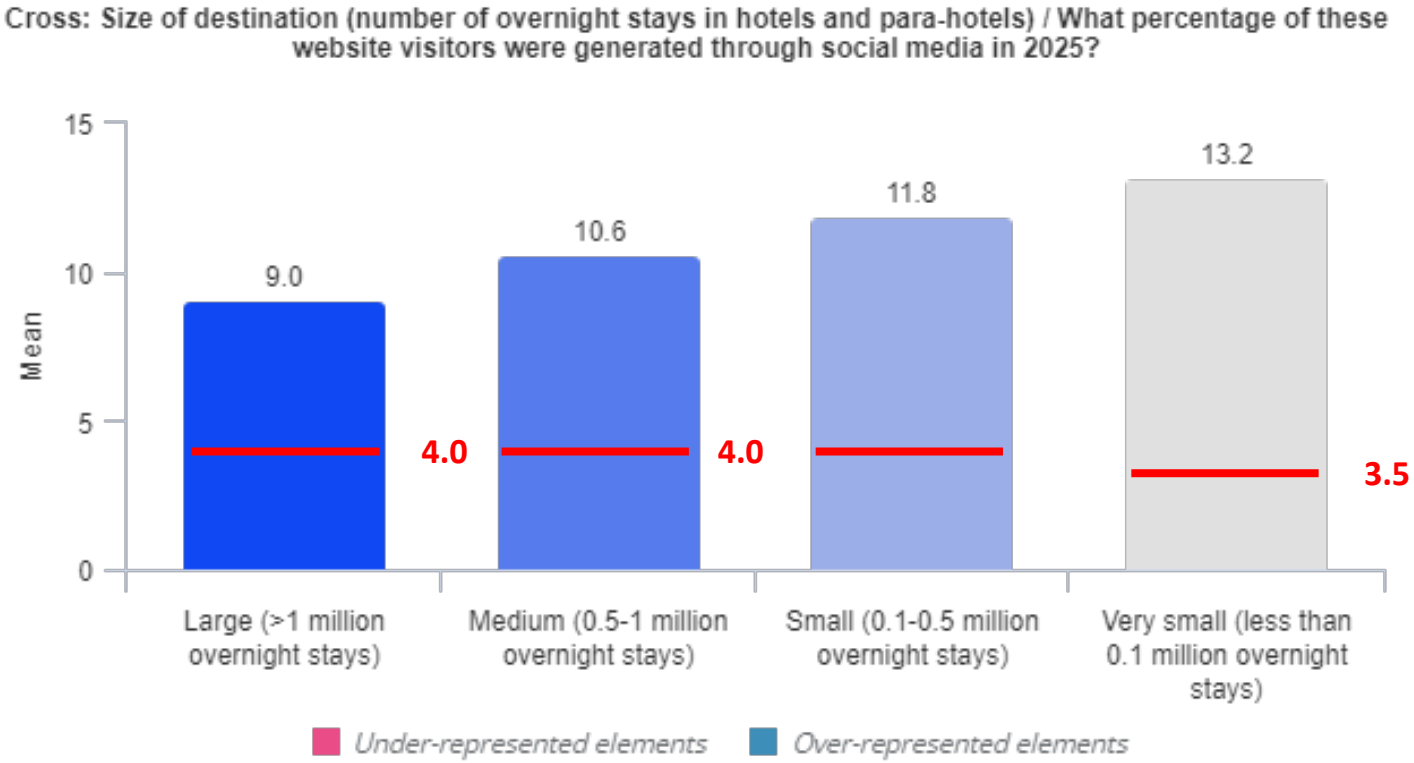
Percentage of website visitors generated via social media in 2025 (global sample, 4 countries)



Percentage of website visitors generated via social media in 2025: average by country



Percentage of website visitors generated via social media in 2025: average by DMO size



Median

Social Media and Web Traffic: A Secondary but Strategic Lever

The analysis shows that social media's contribution to DMO website traffic remains generally **moderate and highly varied**. The median stands at just 4%, indicating that, for most organizations, social media generates a relatively small share of traffic. However, the higher average (11%) and the presence of a significant segment of DMOs exceeding 20% reflect the existence of more advanced and effective strategies in certain cases.

The differences observed between countries should be interpreted with caution. Canada shows significantly higher levels, both on average and at the median, suggesting a stronger integration of social media into traffic acquisition strategies. Conversely, France shows lower values. Switzerland and Austria occupy an intermediate position. Nevertheless, these discrepancies partly reflect the composition of the samples and the profiles of the DMOs, particularly in terms of size and digital maturity.

Analysis by DMO size reveals an interesting finding: while the average tends to increase slightly with size, the median remains relatively stable (around 3 to 4%), or even slightly lower for very small organizations. This indicates that, regardless of their size, the majority of DMOs generate only a limited share of traffic via social media, and that the high performance observed in certain cases is pulling the average upward.

Overall, these results suggest that social media currently plays a greater role as **a lever for visibility, inspiration, and engagement** than as a direct channel for generating traffic. Only certain DMOs manage to integrate them effectively into an acquisition strategy, likely due to more advanced content strategies, better mastery of formats, and stronger coordination with other digital channels.

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The Role of DMOs in Tourism Distribution

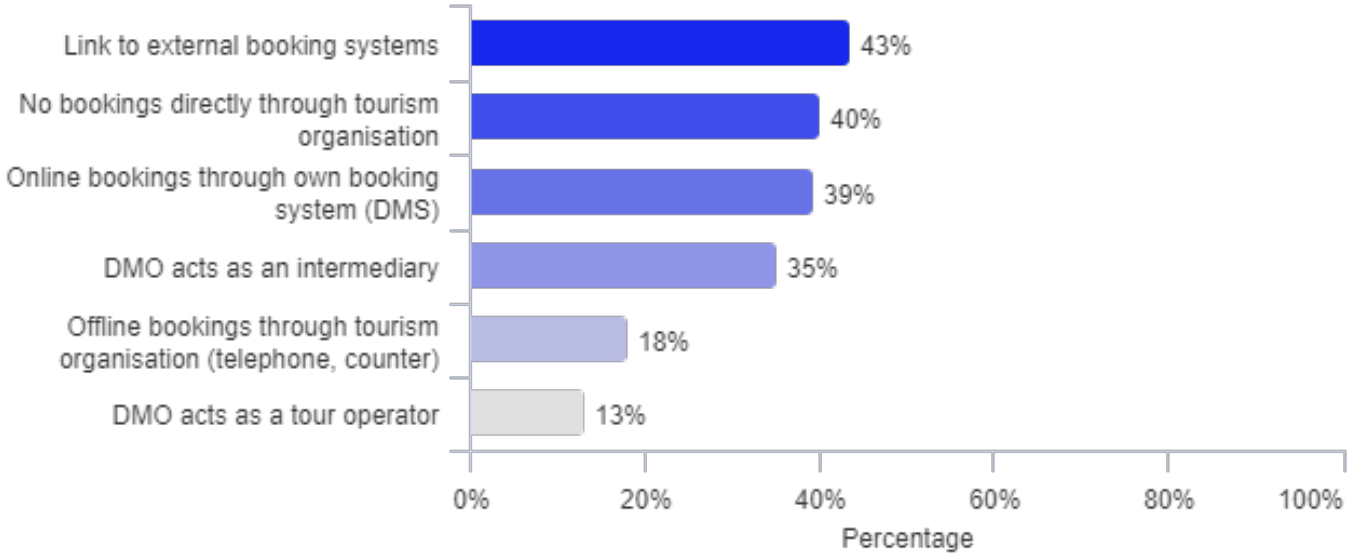


The results show that nearly half of DMOs do not directly manage bookings, preferring indirect approaches such as links to external systems or acting as intermediaries. Only a minority operate their own booking system, and even fewer act as true tour operators. This confirms that DMOs remain primarily facilitators of connections and visibility rather than direct participants in the transaction.

Role of large DMOs in tourism distribution (global sample, 4 countries, DMOs with >500,000 overnight stays)

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

Effective responses: 122 *Response rate: 98%*

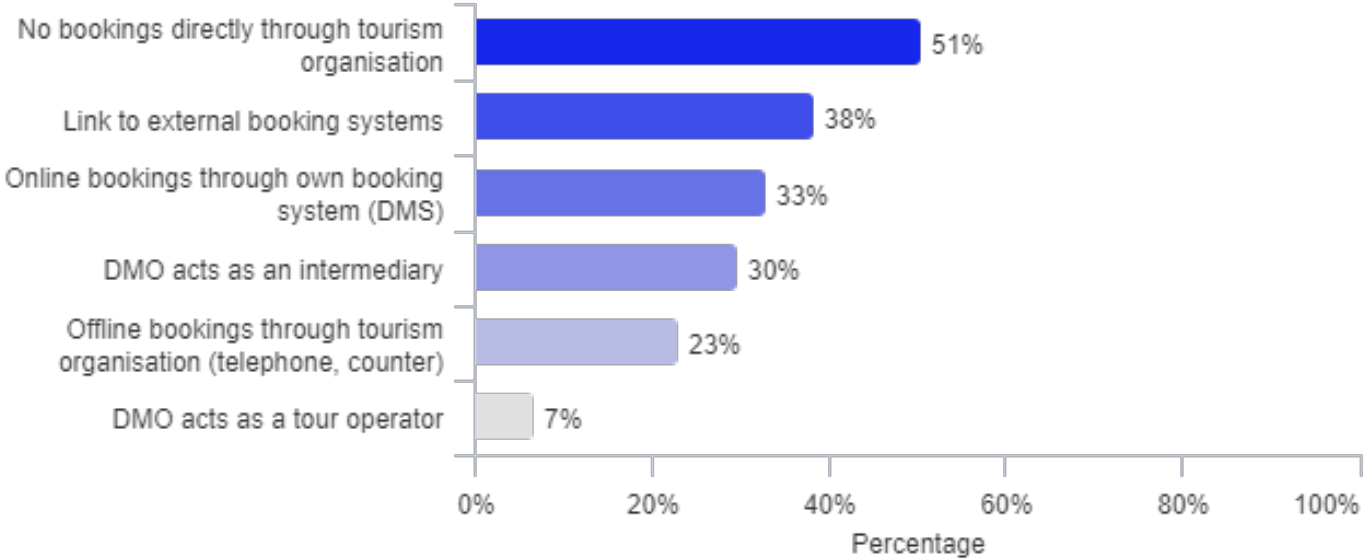


Role of small DMOs in tourism distribution (global sample, 4 countries, DMOs with fewer than 500,000 overnight stays)

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

Effective responses: 91

Response rate: 98%



DMOs and Distribution: Hybrid and Differentiated Models (I)

The analysis highlights a fairly clear structure of the role of DMOs in tourism distribution, characterized by a tension between traditional matchmaking functions and more direct involvement in the transaction for certain organizations.

Globally, DMOs remain **predominantly indirect players in distribution**. A significant proportion do not manage bookings directly and prefer either a complete absence of transactional involvement or mechanisms for redirecting to external systems. This trend is reinforced by the fact that a significant proportion of DMOs do not have a DMS (up to 50% in France, 35% in Switzerland, and 95% in Canada), structurally limiting their ability to intervene in the transaction (see results later in the report). At the same time, a significant proportion is developing its own capabilities through distribution management systems (DMS) or acting as an intermediary, indicating a diversification of models. The role of tour operator, however, remains marginal. Nevertheless, these capabilities remain heavily dependent on the presence of DMS infrastructure, which is itself very unevenly distributed across countries.

The **size of DMOs is a determining factor**. Large destinations are characterized by greater involvement in distribution, with increased use of their own reservation systems and a more pronounced intermediary role. They have the necessary resources to internalize part of the value chain and offer transactional solutions. Conversely, most small DMOs adopt a more hands-off approach, with a higher proportion of organizations that do not directly manage bookings and rely more heavily on external solutions. This reflects resource constraints as well as strategic choices focused on promotion rather than sales.

DMOs and Distribution: Hybrid and Differentiated Models (II)

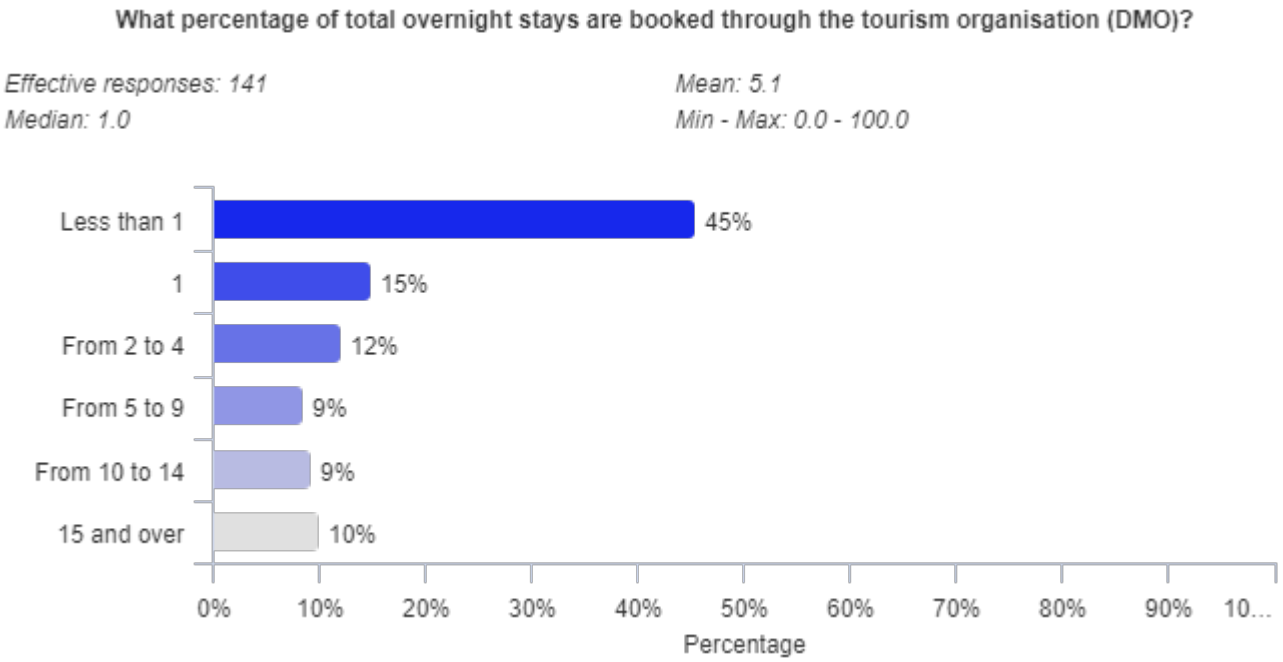
Differences between countries are particularly pronounced and reflect distinct national models. These differences are largely explained by the level of adoption and structuring of DMSs.

Austria stands out for its very high level of integration into distribution, with a large majority of DMOs operating their own booking systems and acting as intermediaries, or even as tour operators. This reflects an ecosystem historically structured around DMSs and a strong culture of direct marketing. In contrast, **Canada** exhibits a model much more focused on promotion, with the vast majority of DMOs not directly involved in booking and not operating their own systems. The near-total absence of DMSs (95%) structurally limits any transactional capacity.

France occupies an intermediate position, combining a strong focus on redirecting users to external platforms with a more limited transactional role. The DMS landscape there is fragmented, with no dominant standard, and a high proportion of DMOs without systems (50%). **Switzerland** adopts a hybrid model, with a relatively large share of DMOs possessing booking systems, while maintaining a strong referral component.

Ultimately, these results show that the role of DMOs in tourism distribution is not uniform and depends heavily on the institutional context, the level of digital maturity, and available resources. They also highlight a gradual shift toward more integrated models for certain destinations, without undermining the central role of DMOs as agents of visibility, coordination, and networking within the tourism ecosystem.

Contribution of DMOs to tourist overnight stays: a limited direct impact

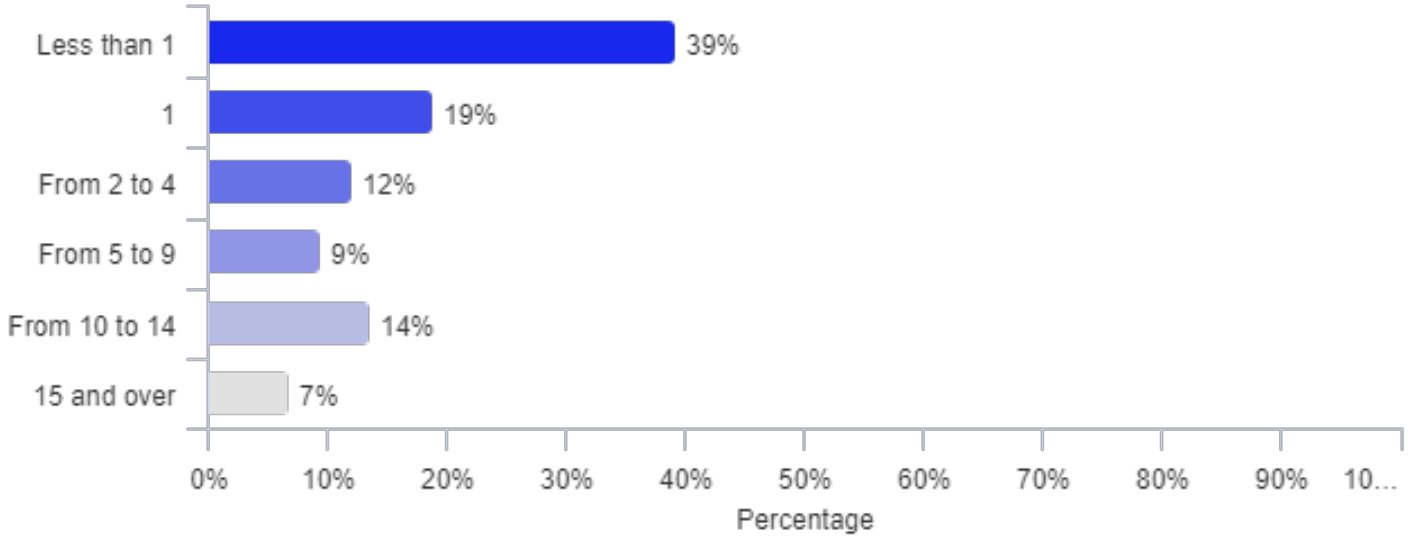


The results show that for nearly half of the DMOs, less than 1% of overnight stays are generated directly through them, with a very low median (1%). Although some organizations achieve higher levels, the average remains moderate (5%), indicating a wide variation in outcomes. This confirms that the role of DMOs in the direct generation of overnight stays remains generally marginal and concentrated among a limited number of players.

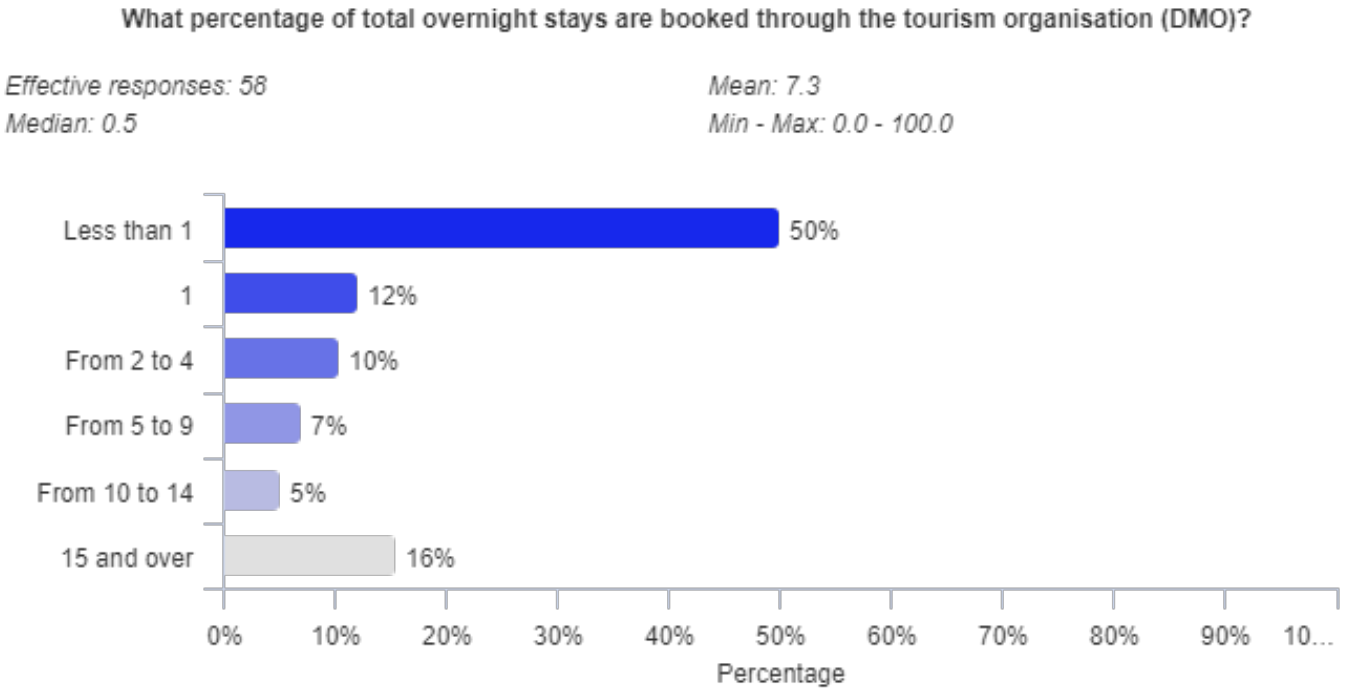
Contribution of major DMOs to tourist overnight stays (overall sample, 4 countries, DMOs with >500,000 overnight stays)

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

Effective responses: 74
Median: 1.0
Mean: 3.9
Min - Max: 0.0 - 30.0



Contribution of small DMOs to tourist overnight stays (overall sample, 4 countries, DMOs with fewer than 500,000 overnight stays)



DMOs and Overnight Stays: A Limited and Uneven Contribution (I)

The analysis confirms that the direct contribution of DMOs to tourist overnight stays remains generally **low and highly concentrated**, even among major destinations. In the overall sample, the median stands at just 1%, and nearly 40 to 50% of DMOs generate less than 1% of overnight stays through their own channels. This indicates that, for the majority of organizations, the direct impact on booking volumes remains marginal, despite sometimes significant investments in distribution tools.

The **size of DMOs plays a role, but to a lesser extent** than other factors. Major destinations have a slightly lower average than smaller ones, which may seem counterintuitive. However, this can be explained by a wide variation in circumstances: some small DMOs achieve high levels (up to 100%), pulling the average upward, while large organizations often remain integrated into distribution ecosystems dominated by third-party players (OTAs, platforms), limiting their direct share.

DMOs and Overnight Stays: A Limited and Uneven Contribution (II)

Differences between countries are particularly indicative of distinct distribution models. **Austria** stands out with a more structured and consistent contribution, featuring a higher median and a concentration of responses in the intermediate ranges (2–4%), reflecting a well-integrated DMS system and a tradition of local distribution. This performance is likely due to strong standardization around a dominant DMS (Deskline Feratel), enabling better integration and transactional efficiency (see DMS results later in the report).

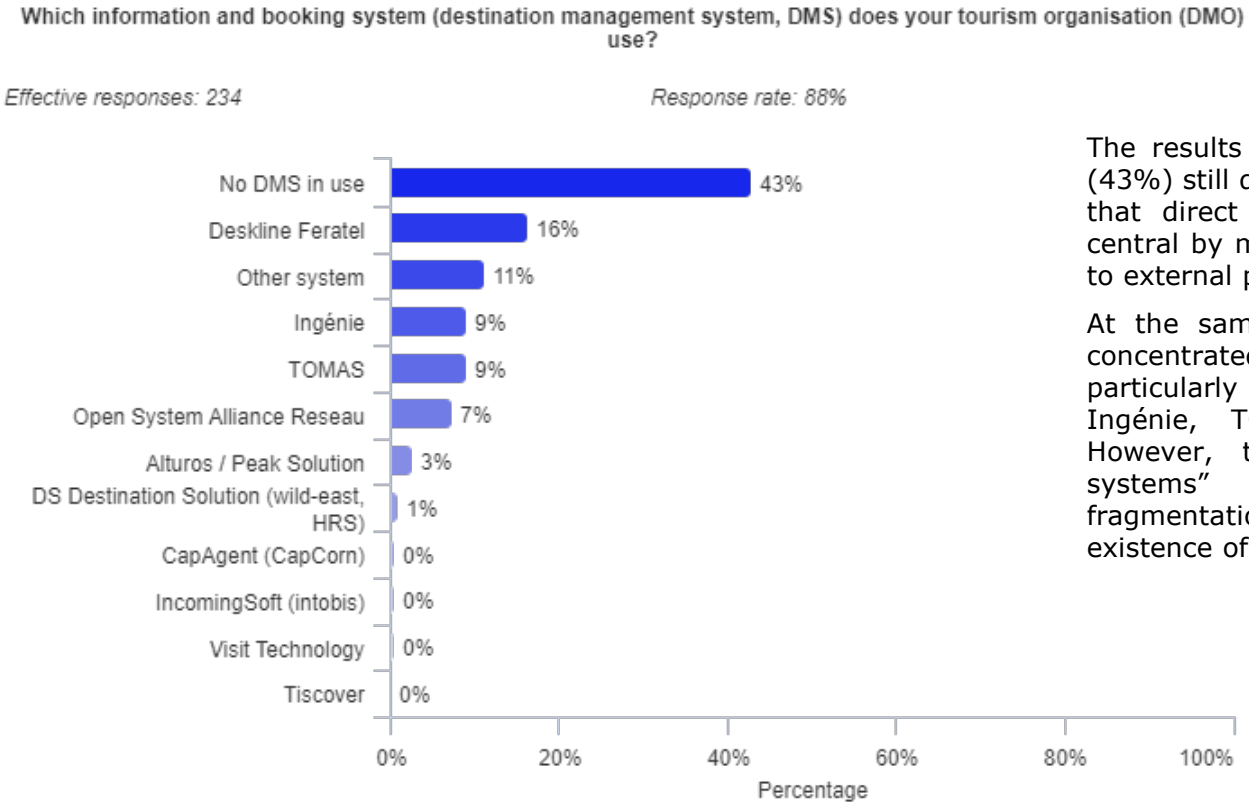
Conversely, **Canada** and **France** show very low levels, with a majority of DMOs generating less than 1% of room nights, confirming a positioning primarily focused on promotion rather than transactions. In both cases, the low contribution is directly linked to the absence or fragmentation of DMSs (95% without a DMS in Canada, ~50% in France), severely limiting the ability to capture bookings

Switzerland occupies an intermediate position, with a more balanced distribution and a significant share of DMOs reaching higher levels (5–15%), reflecting a hybrid model.

Ultimately, these results show that, despite the rise of digital tools and DMSs, DMOs remain largely secondary players in the direct generation of room nights. More fundamentally, the presence, level of adoption, and degree of standardization of DMSs appear to be key factors explaining performance gaps between countries.

Their primary role remains that of a facilitator and catalyst for demand, while the transaction is largely captured by external platforms. Only certain destinations, often within specific institutional contexts, manage to internalize a significant portion of distribution.

DMS used



The results show that a significant share of DMOs (43%) still do not operate their own DMS, confirming that direct booking functions are not considered central by many organizations or remain outsourced to external platforms and providers.

At the same time, the market appears relatively concentrated around a few dominant solutions, particularly Deskline Feratel (16%), ahead of Ingénie, TOMAS, and Open System Alliance. However, the relatively large share of "other systems" also highlights the continued fragmentation of the DMS landscape and the existence of many local or specialized solutions..

DMS: National Models Showing Significant Variations

The comparative analysis highlights **highly contrasting DMS models across countries (see results in the appendices),** reflecting different approaches to tourism organization.

Austria appears to be the most integrated case, with **near-standardization around Deskline Feratel**, used by a large majority of DMOs. This model promotes data sharing, consistency in offerings, and an increased ability to integrate distribution at the destination level. In contrast, **Canada** is characterized by a **near-total absence of DMS systems**, confirming a positioning of DMOs focused on promotion, with complete outsourcing of transactional functions.

Between these two extremes, **France** and **Switzerland** feature **hybrid and fragmented models**. In France, half of the DMOs do not have a DMS, and those that do use a wide variety of solutions, with no dominant standard. In Switzerland, the situation is more structured with a few major solutions (TOMAS, Deskline), but without reaching a level of coordination comparable to Austria's. In both cases, DMOs often combine multiple tools, reflecting a modular approach but also a certain degree of fragmentation.

The **high fragmentation of DMSs in France** limits data sharing: lack of standards, reduced interoperability, and a partial view of the market. Unlike an integrated model such as that in Austria, this hinders collective management, customization, and the strategic capacity of DMOs in relation to platforms.

The issue of DMOs without DMS is particularly revealing. Their share remains high in several countries (up to 50% in France, 35% in Switzerland, and 95% in Canada), which underscores that **the booking function is not considered central** for a large portion of these organizations. This can be explained by resource constraints, technological complexity, but also by a strategic choice not to compete with private players (OTAs, service providers). These DMOs therefore prioritize roles focused on raising visibility, coordinating, and facilitating the ecosystem.

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Social media: a tool for increasing visibility… but with little direct conversion

- Analysis of social media reveals a **strong convergence of practices across countries**, with a common foundation dominated by Facebook, Instagram, LinkedIn, and Google reviews.
- However, their **direct contribution to web traffic remains limited**: the median stands at around 4%, indicating that, for the majority of DMOs, social media is not a major acquisition channel.
- This finding calls for a nuanced view of the prevailing narrative on **social media**. These platforms primarily serve **as a source of inspiration, branding**, **and engagement**, but rarely act as a direct entry point in the booking journey. The customer journey remains fragmented, multi-touch, and largely dominated by other channels (SEO, direct traffic, platforms).
- The differences observed, particularly in Canada where levels are higher, suggest that some DMOs are better able to integrate social media into their acquisition strategies. However, these results remain the exception and depend on more advanced content, targeting, and integration strategies.
- The “so what” is clear: the question is no longer about having a presence on social media, but about knowing **how to effectively connect it to the other building blocks of the digital ecosystem** (website, data, CRM, distribution).

Distribution: A Strategic and Structural Choice

- The results should not be interpreted solely as an indicator of digital maturity, but rather as a reflection of **strategic choices heavily influenced by institutional and political contexts**. While a significant proportion of DMOs do not directly manage bookings, this does not merely reflect a lack of capacity or tools, but also deliberate strategic positioning. In several contexts, notably in France or Canada, DMOs operate within frameworks where their role has historically been defined as that of a promotional actor, in order to avoid any competition with private providers or platforms. Conversely, in environments such as Austria, the integration of transactional functions within DMOs is part of a national tourism policy aimed at strengthening local control over distribution and limiting dependence on global intermediaries.
- Thus, the presence or absence of DMS is not solely a matter of the level of digitalization, but rather a trade-off between governance, institutional role, and value capture strategy. This explains why very different models coexist, without a single model prevailing.
- Beyond the current sales and distribution challenges, the findings prompt an important forward-looking question about the emergence of AI agents in the booking process. These new intermediaries rely on structured, up-to-date, interoperable data, which is accessible via APIs, in order to integrate tourism offerings into automated recommendations. **The decisive factor is not just the DMS, but also a destination's ability to provide high-quality data in a machine-readable format** (e.g. via a tourism information system, TIS). In this context, the absence of a DMS among some DMOs represents not only an operational limitation, but also a risk of invisibility in future digital environments. In other words, destinations without suitable data infrastructures could gradually be excluded from AI-driven booking interfaces in favour of more organised players or global platforms. This brings the issue of the DMS to the fore, not merely as a sales tool, but also as a **strategic challenge concerning data sovereignty, visibility, and market access within tomorrow's digital ecosystems**.

What Role Do DMOs Play in the Age of Platforms and AI?

- These findings call for a rethinking of the strategic positioning of DMOs in an environment dominated by platforms and increasingly shaped by data and artificial intelligence.
  - First, they confirm that the **historical role of DMOs as facilitators of networking, coordination, and visibility remains central and relevant**. Most organizations do not necessarily seek to become transactional players, but rather to orchestrate the local tourism ecosystem.
  - Second, they show that **hybrid models** will become the norm. Some destinations, particularly the largest or best-structured ones, will continue to strengthen their direct distribution capabilities, while others will deliberately remain within an intermediation framework.
  - Finally, against the backdrop of the growing influence of AI and recommendation systems, the issue of data control, quality, and structuring is becoming the decisive factor. **In the future, what will matter less is whether a DMO operates its own DMS, and more whether it possesses structured, up-to-date, and interoperable data that can be accessed through interfaces used by AI systems.** DMOs that are unable to control or provide access either to the transaction itself or to the related data risk losing influence within the tourism value chain — in favor of actors capable of integrating visibility, recommendation, and booking within the same ecosystem.
- The real challenge, therefore, is no longer whether DMOs should sell, but how they can remain visible, relevant, and influential in a system where decision-making and transactions are increasingly mediated by platforms and intelligent agents.

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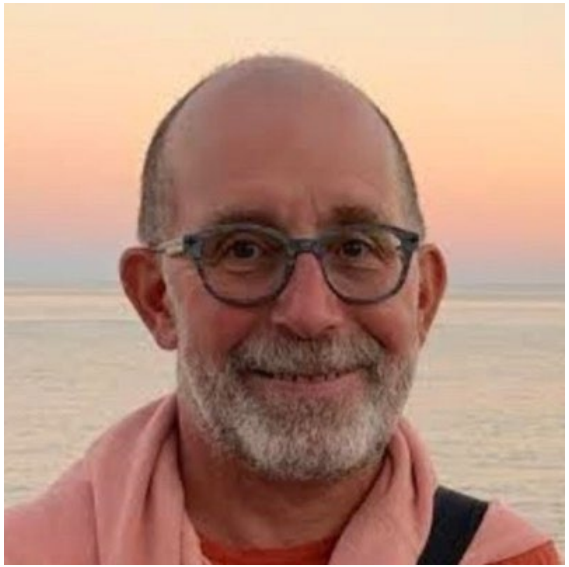
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Resilient Tourism Flagship

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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.

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icare RESEARCH

EHL

FH GR Fachhochschule Graubünden University of Applied Sciences

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Questionnaire (Swiss version)



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.

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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
- ☐ Link to external booking systems
- ☐ Online bookings through own booking system (DMS)
- ☐ Offline bookings through tourism organisation (telephone, counter)
- ☐ DMO acts as an intermediary
- ☐ DMO acts as a tour operator

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

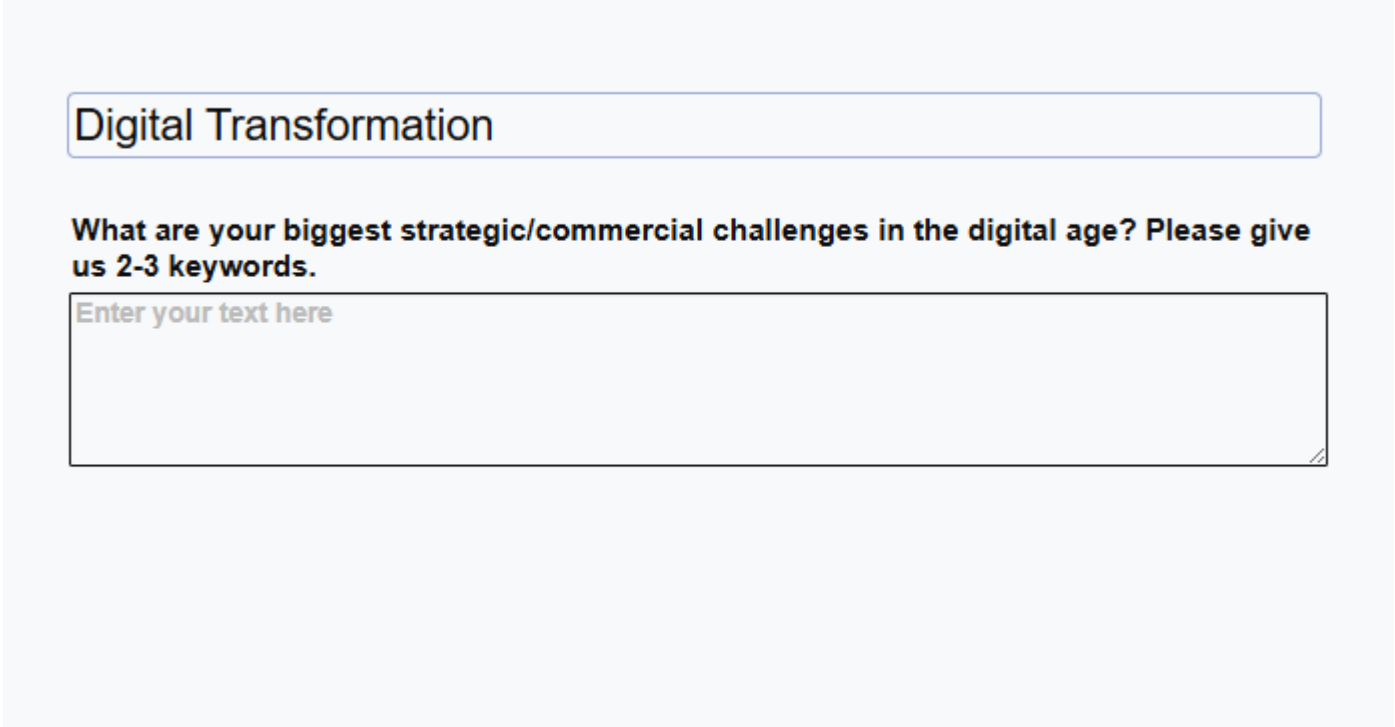
_____ %

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

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

If other system, which? _____

Questionnaire



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	○	○	○

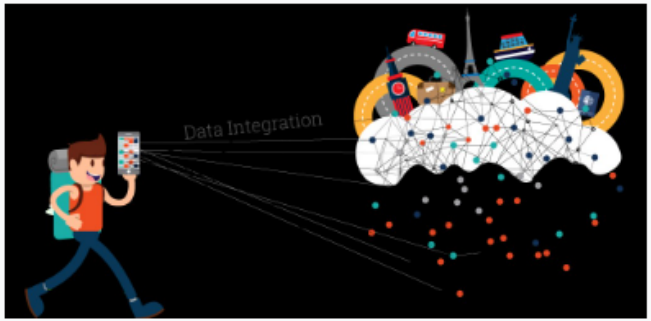
Questionnaire

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

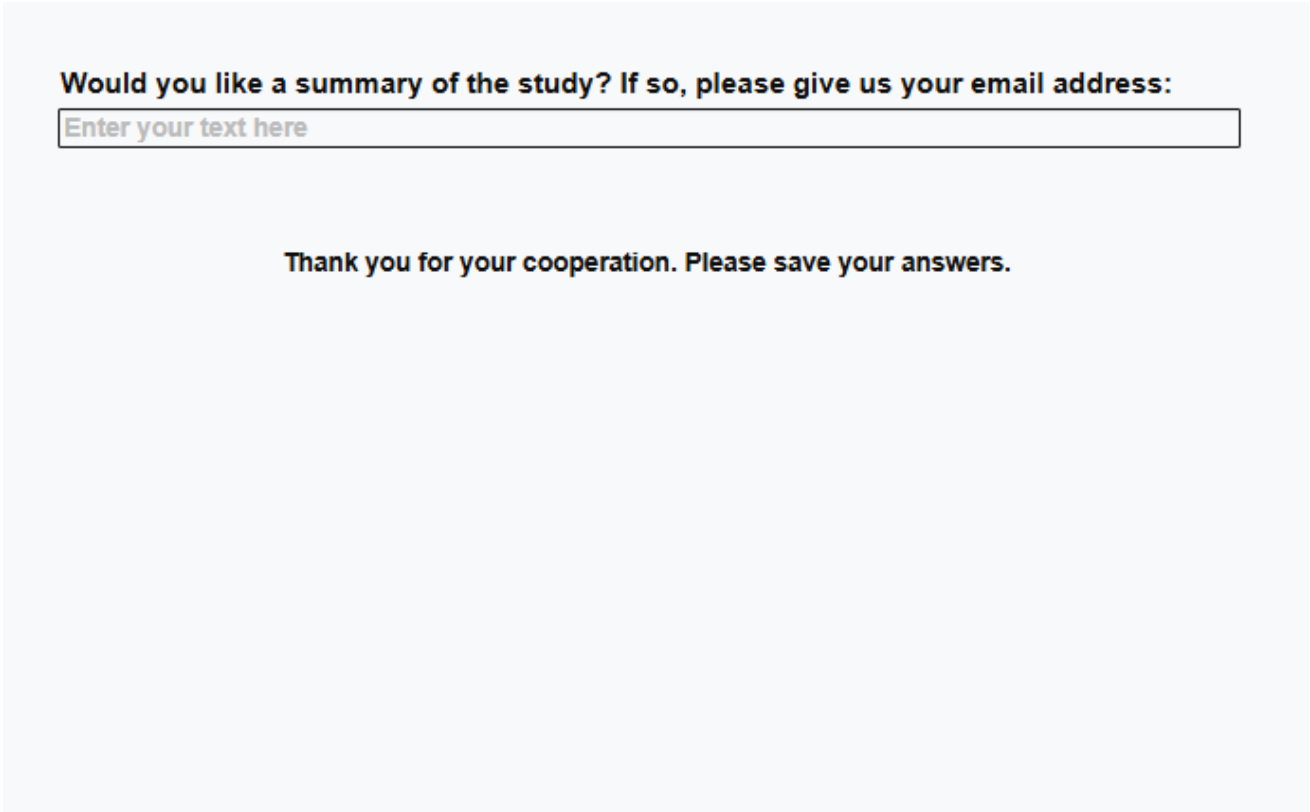
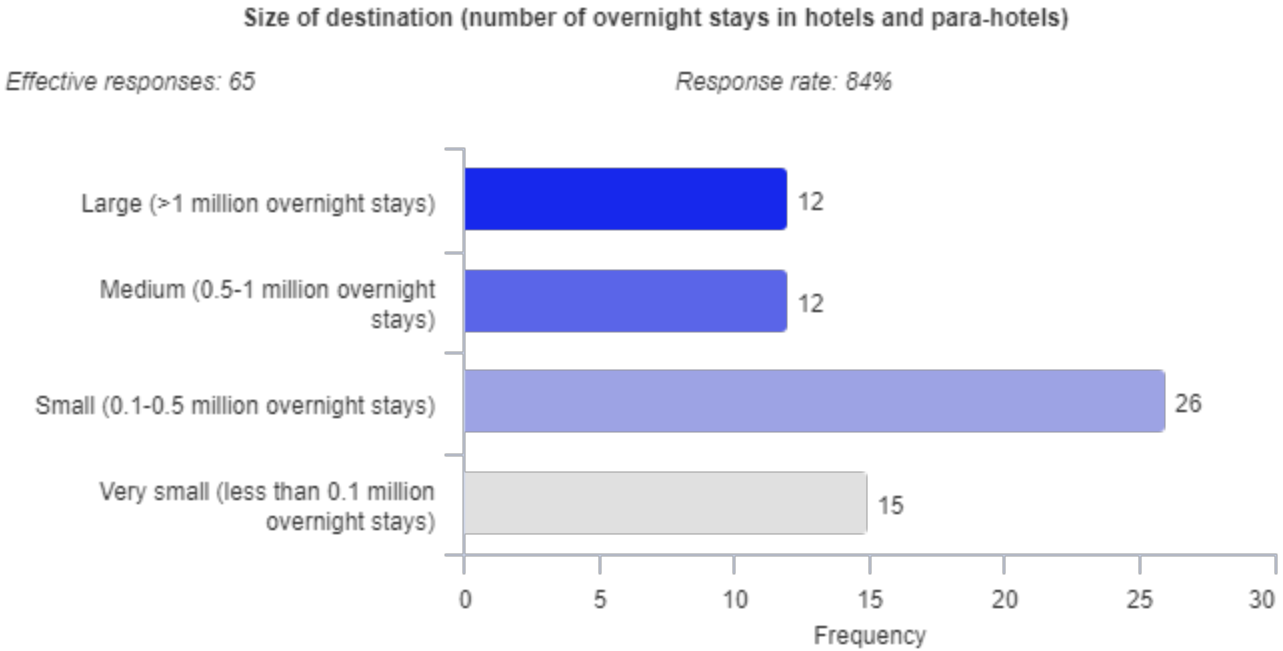


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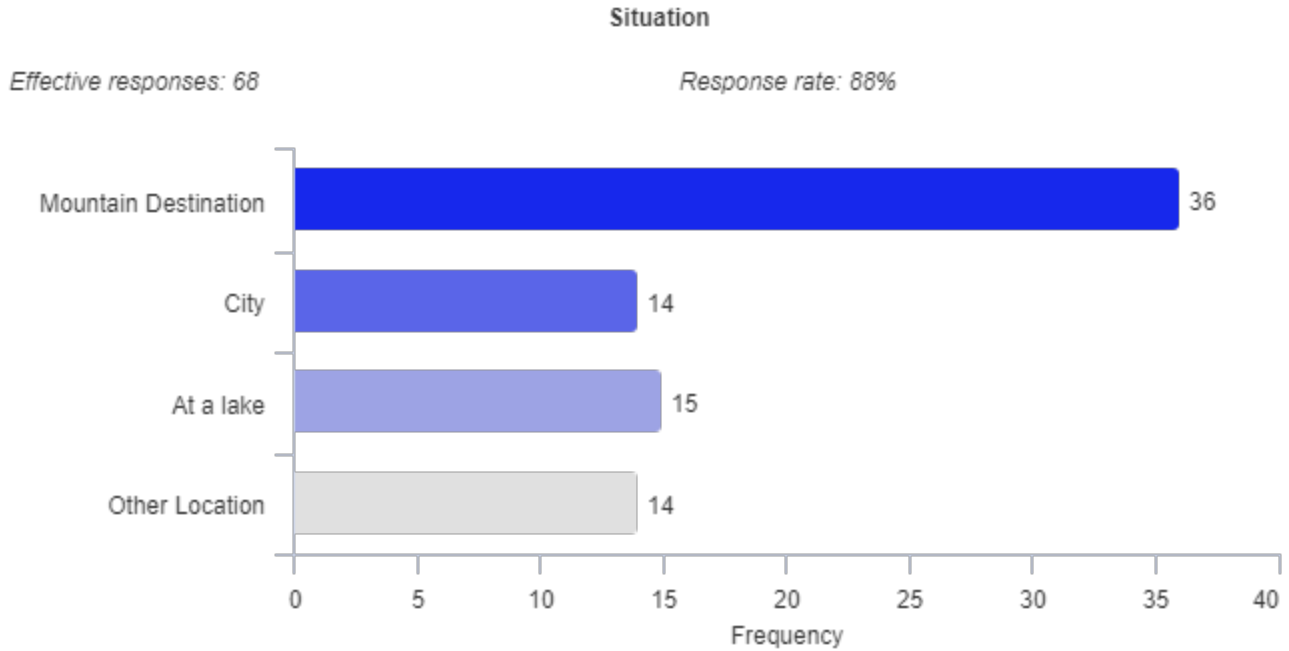
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7. Contacts
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9. Appendix: Sample profile by country
10. Appendix: Detailed results by country



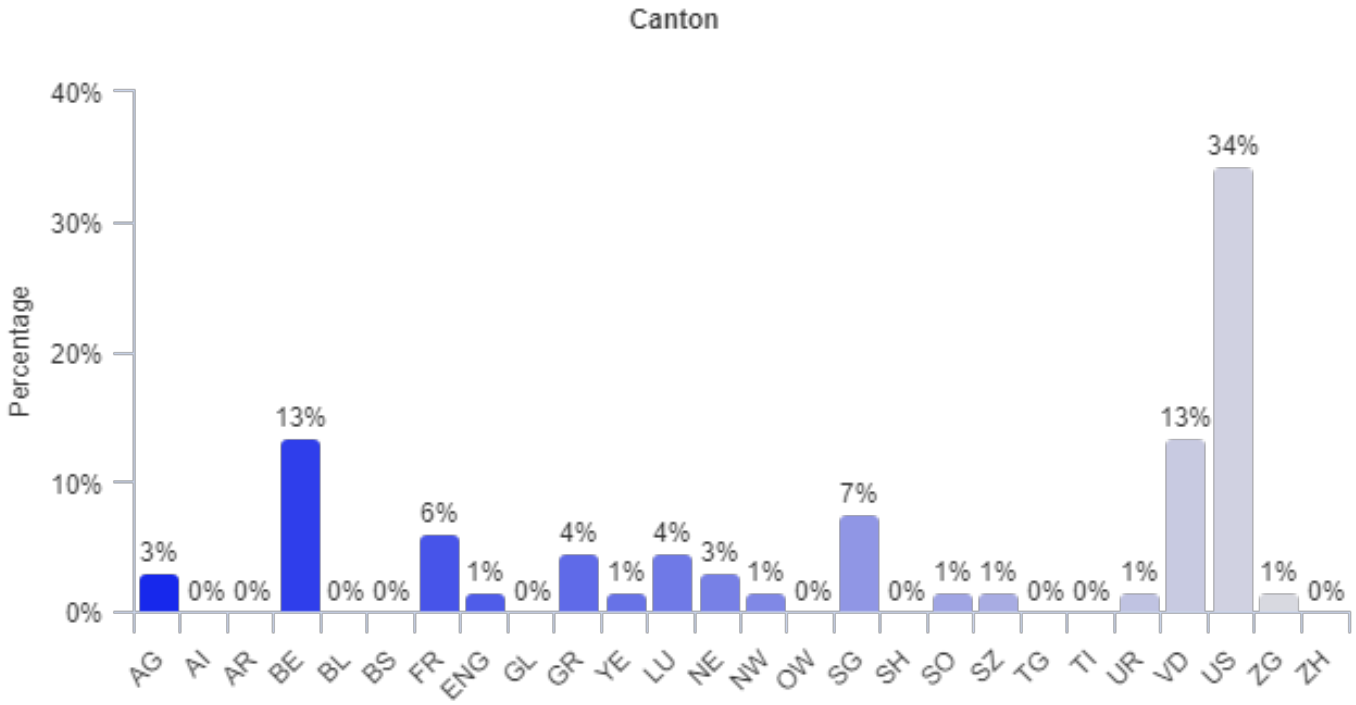
Swiss Sample: DMO Size



Swiss Sample: DMO Situation

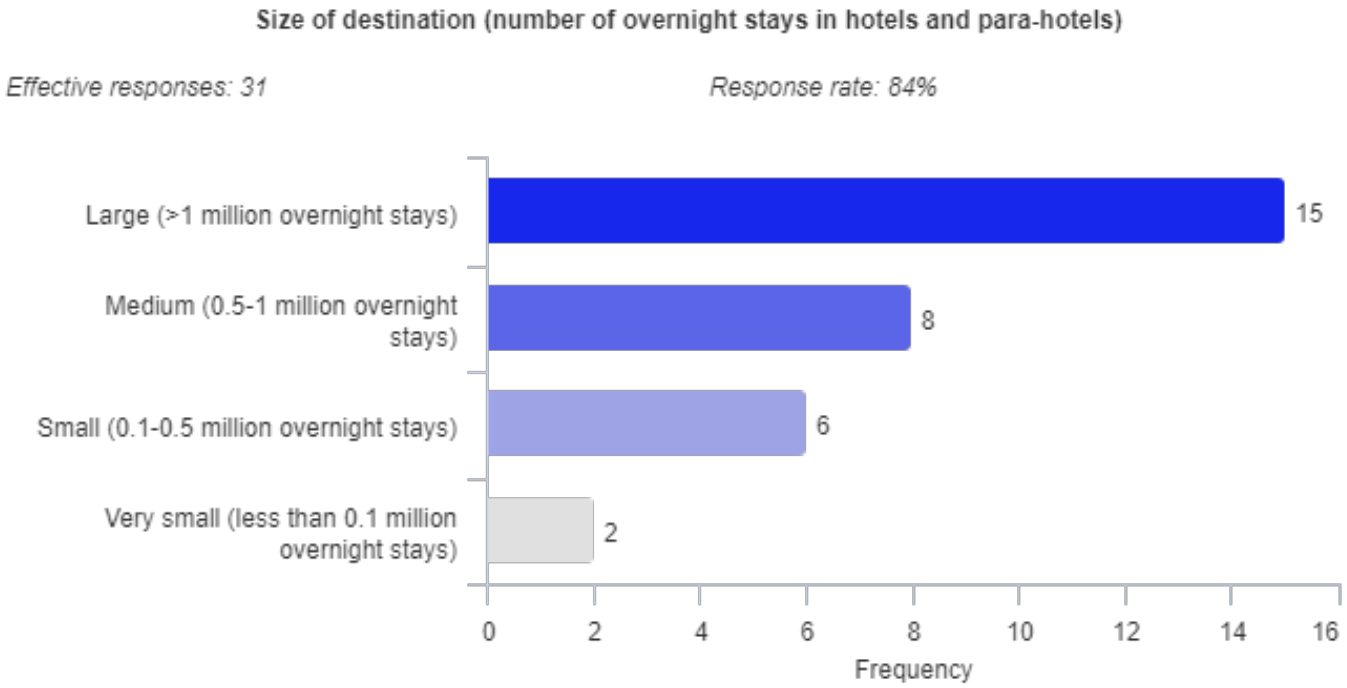


Swiss Sample: Cantons

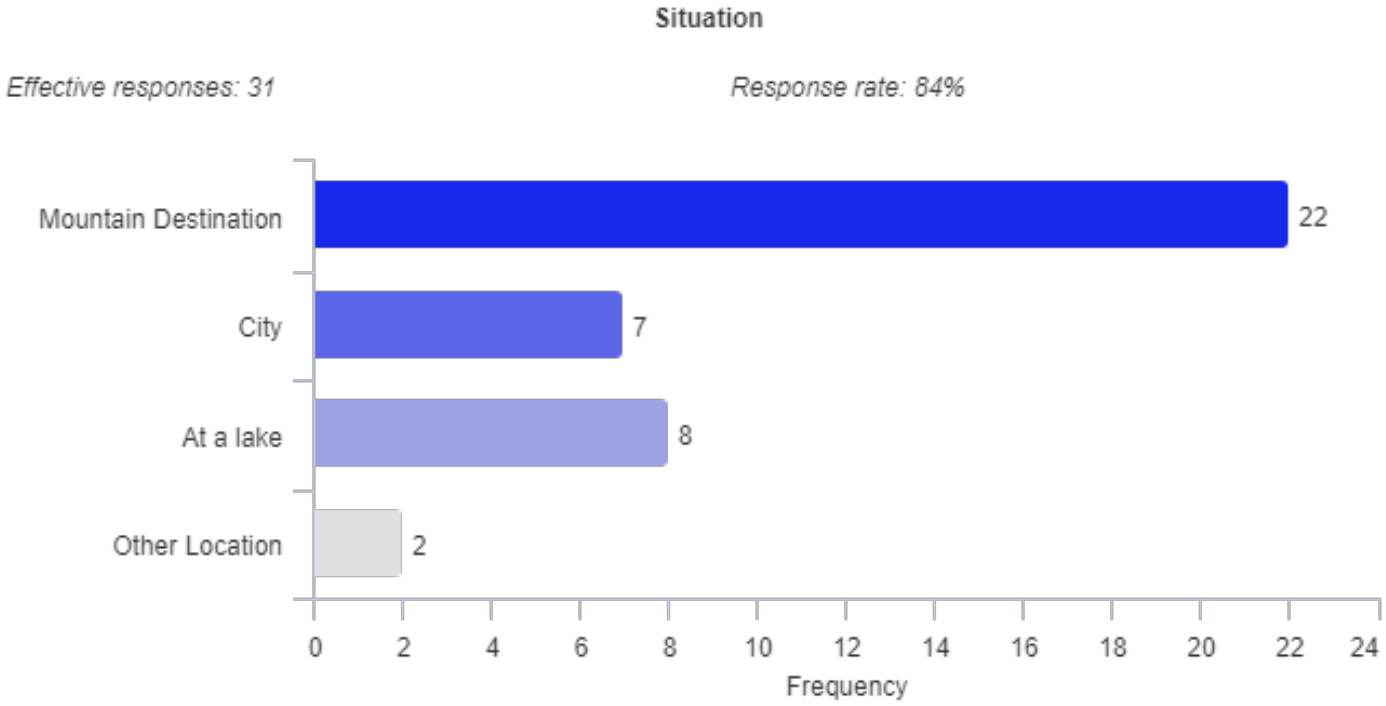




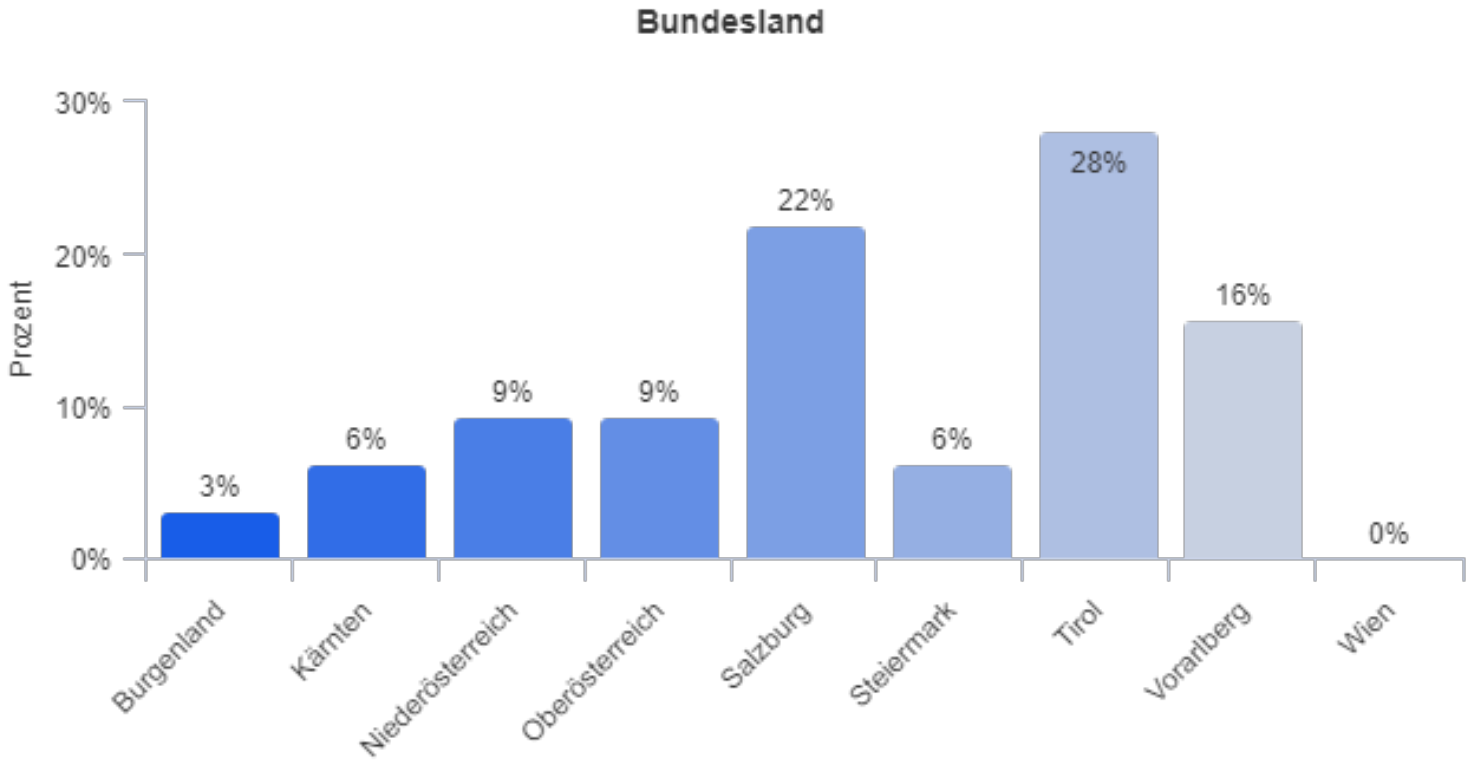
Austrian Sample: DMO Size



Case Study: Austria – DMO Situation

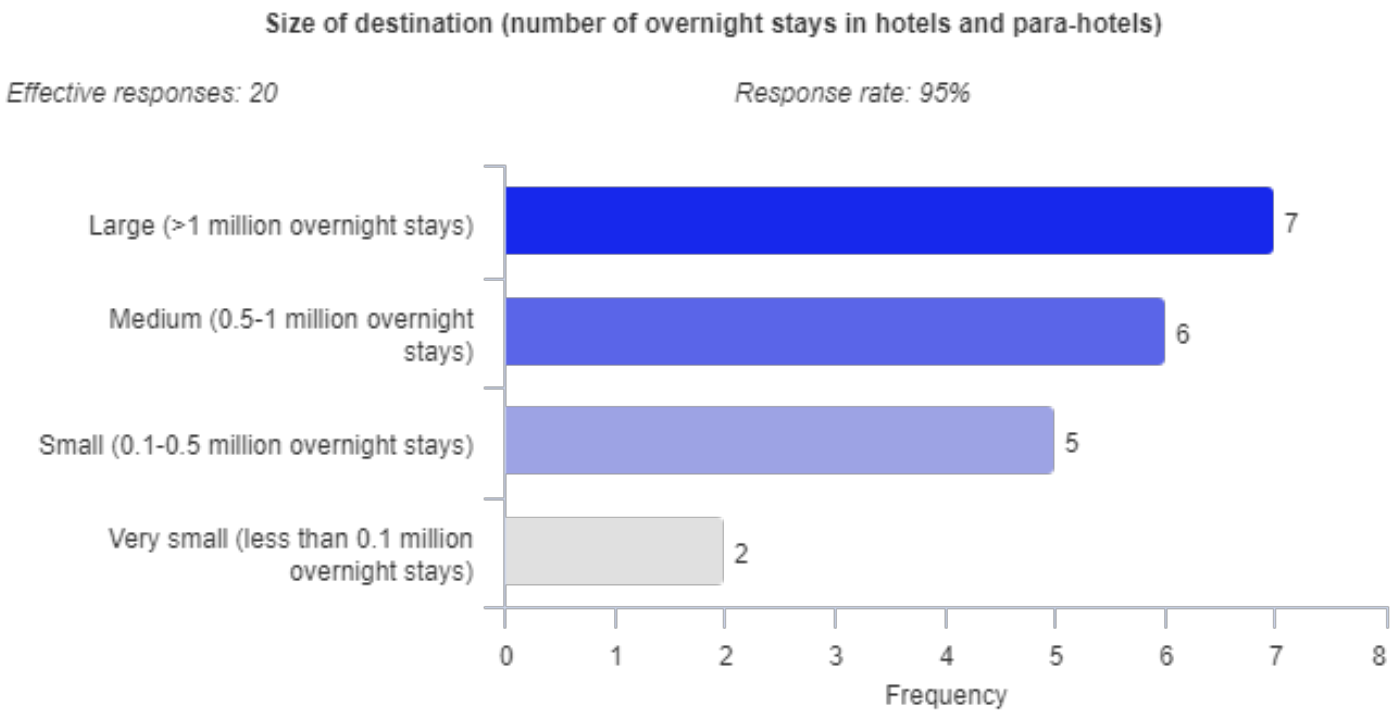


Sample Austria: Regions

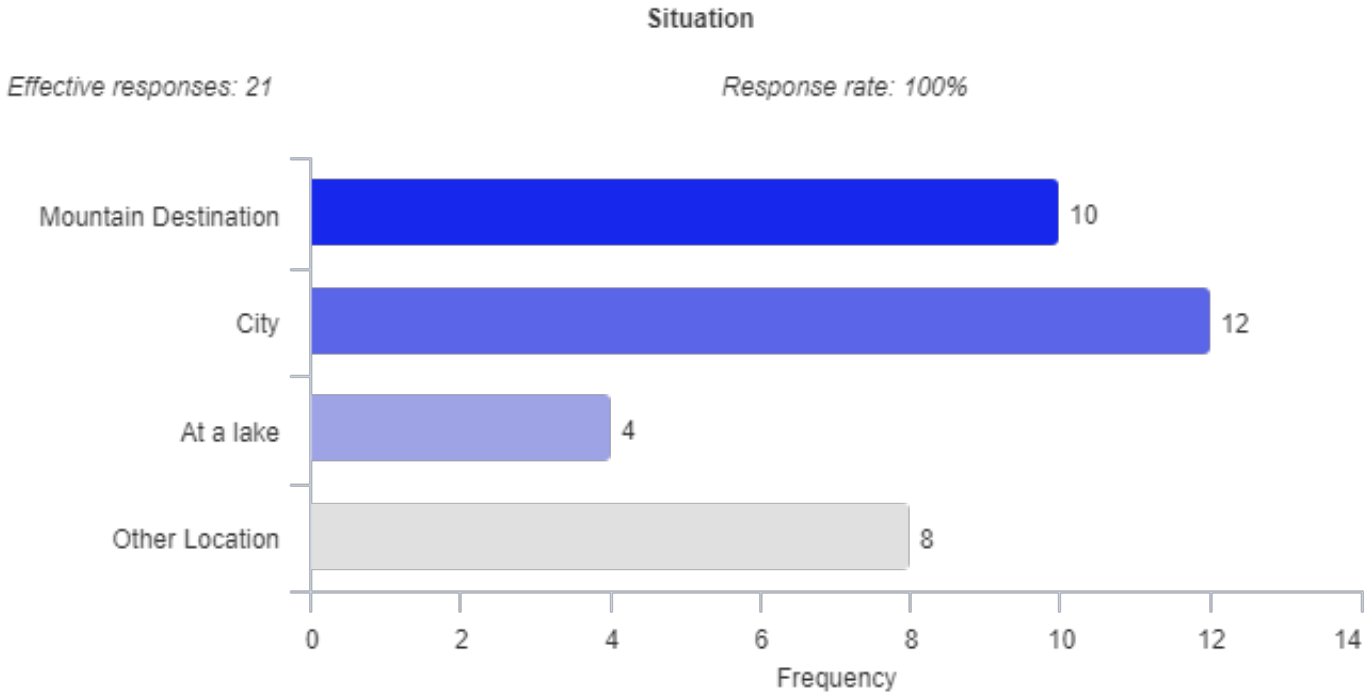




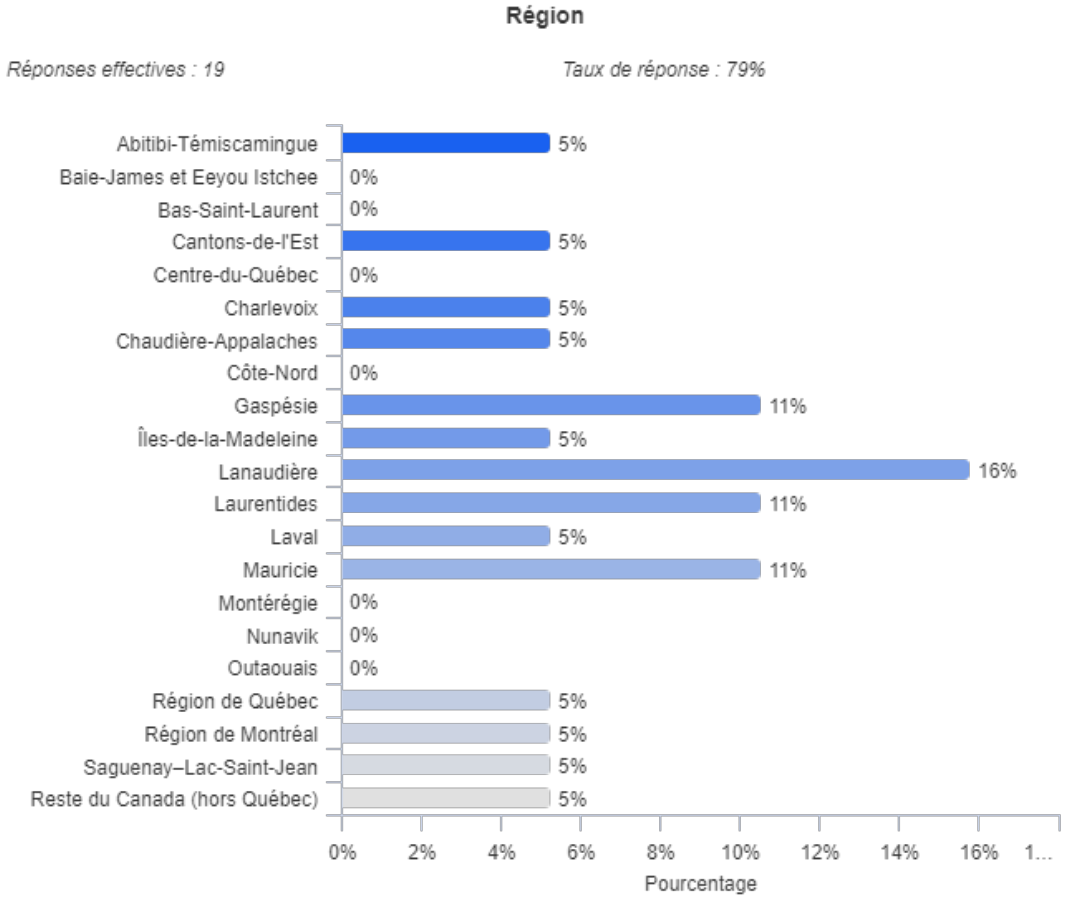
Canada Sample: DMO Size



Canada Sample: DMO Situation

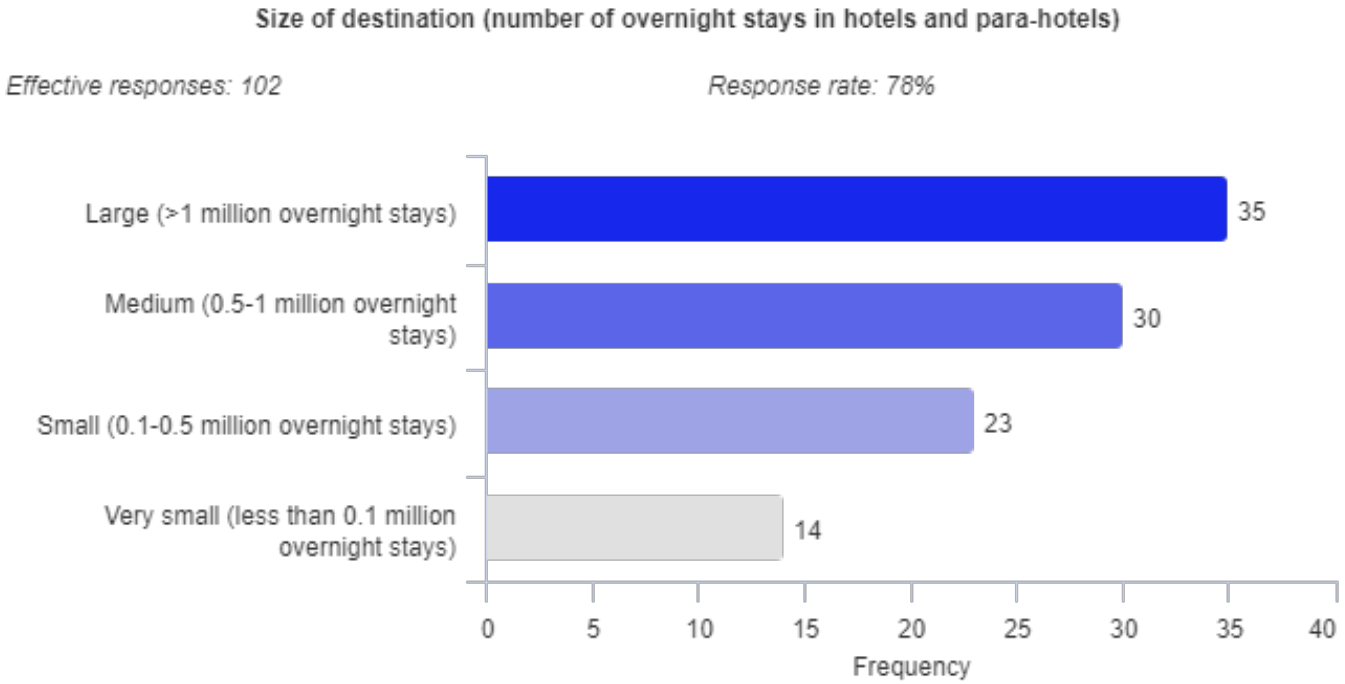


Sample Canada: Regions

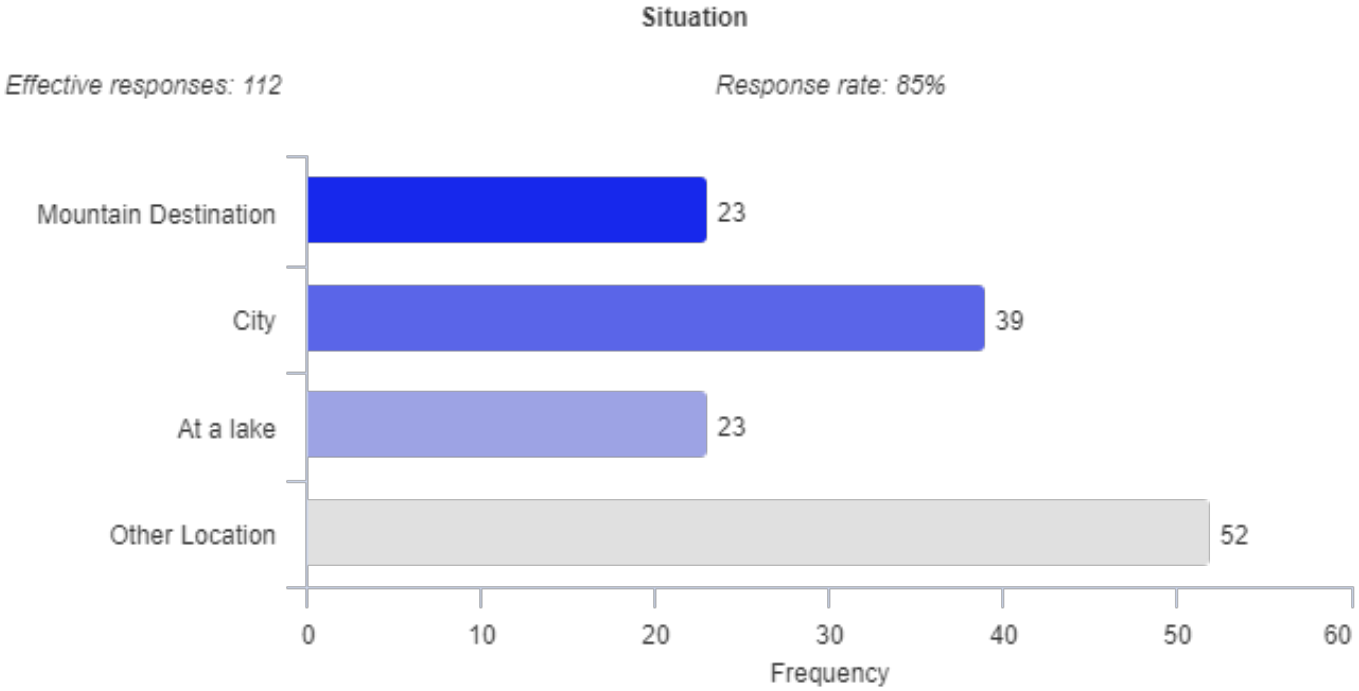




France Sample: DMO Size



France Sample: DMO Situation



Sample France: Regions

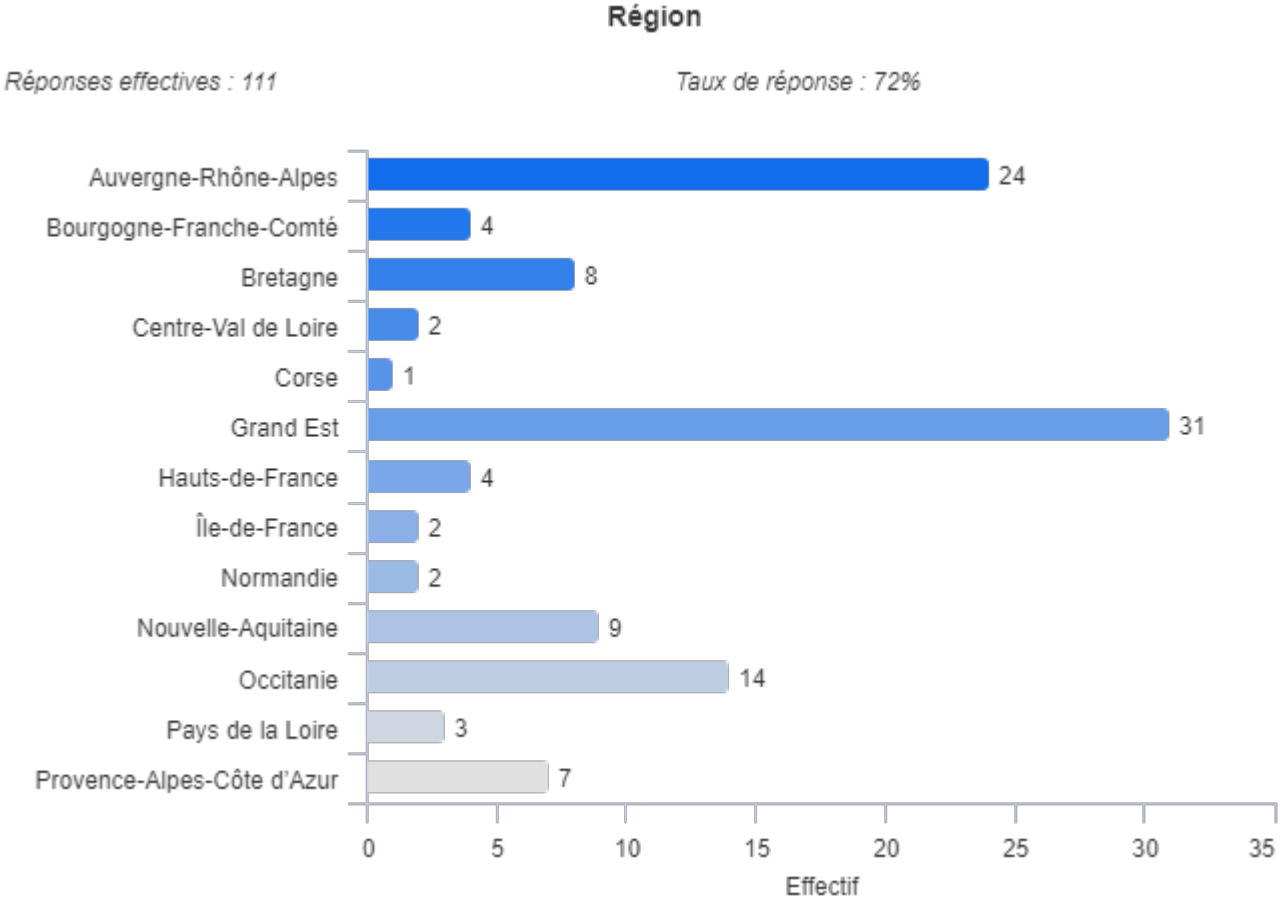
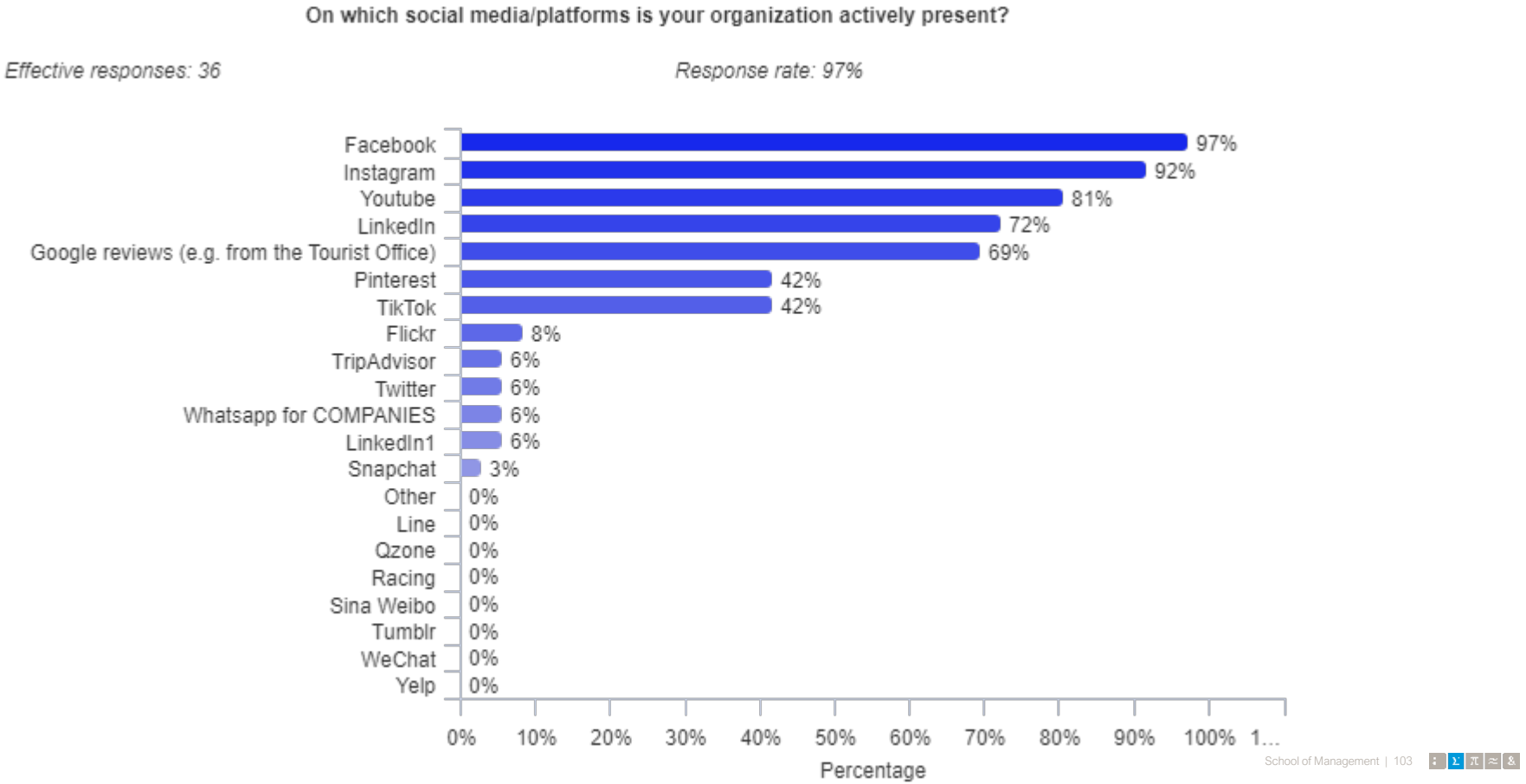


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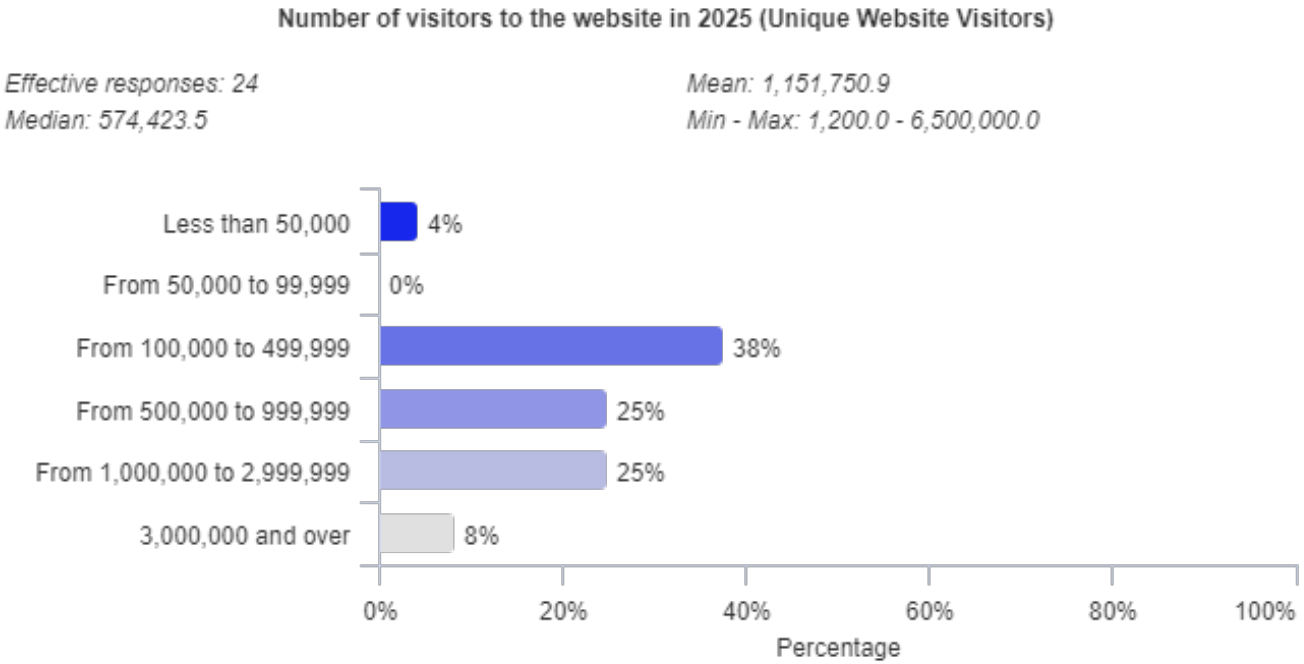
1. Executive Summary
2. Study Background
3. Method
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8. Appendix: Questionnaire
9. Appendix: Sample profile by country
10. Appendix: Detailed results by country



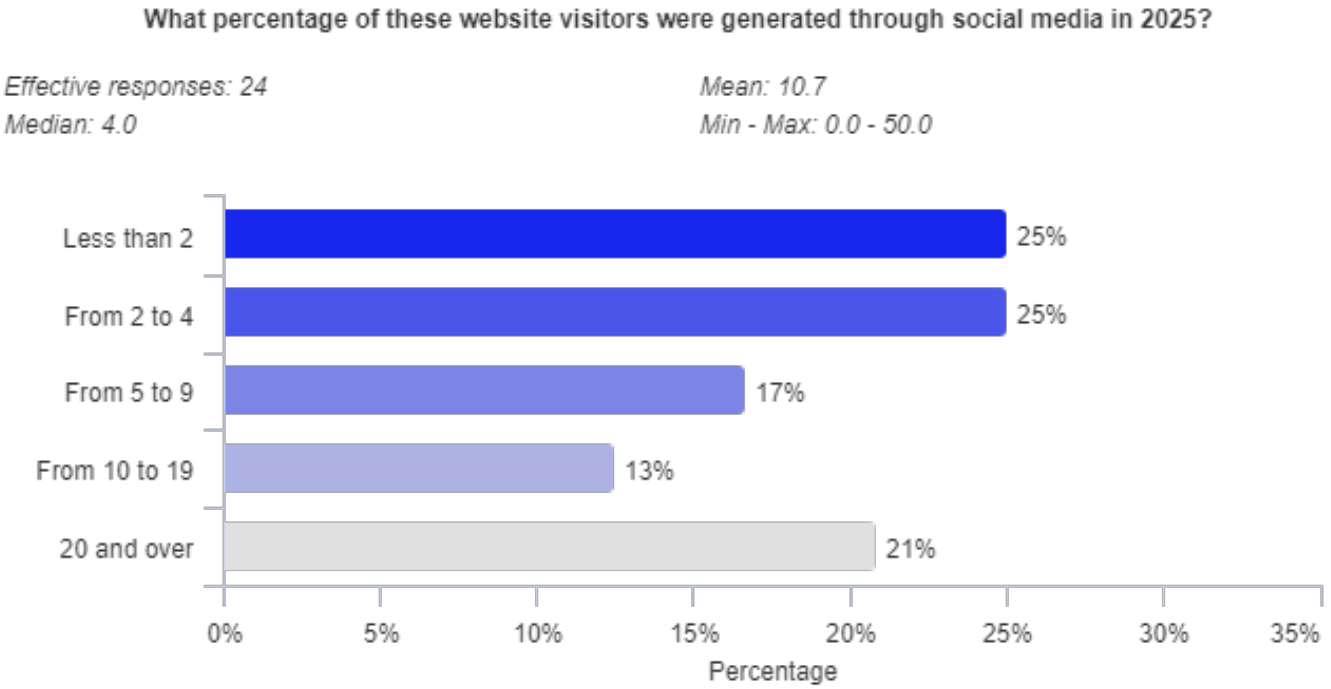
The Use of Social Media in DMOs in Austria



Number of website visitors in 2025 for DMOs in Austria



Percentage of website visitors generated via social media in 2025: Austria

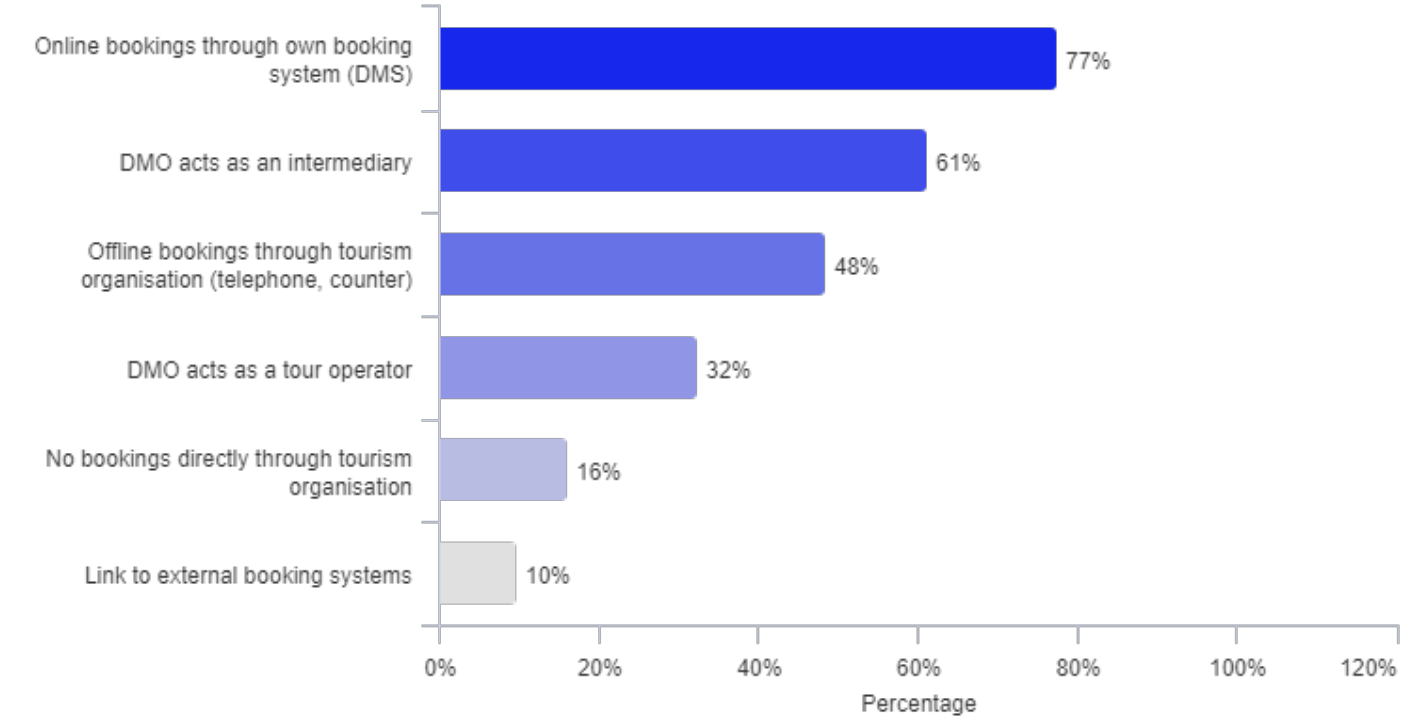


The Role of DMOs in Tourism Distribution: Austria

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

Effective responses: 31

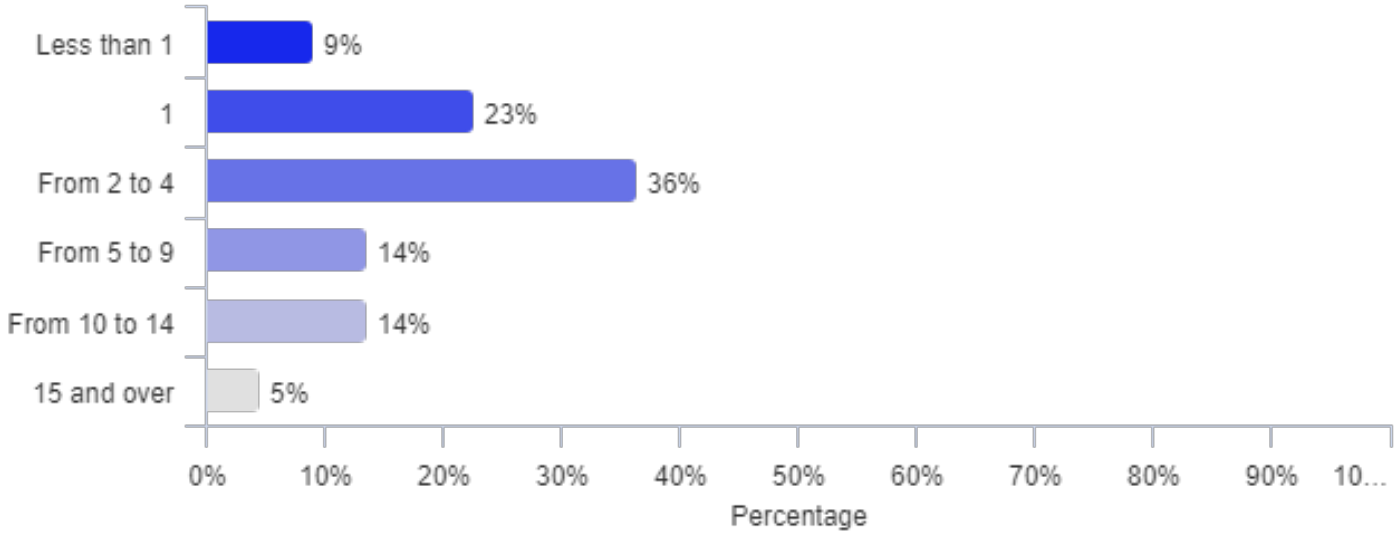
Response rate: 84%



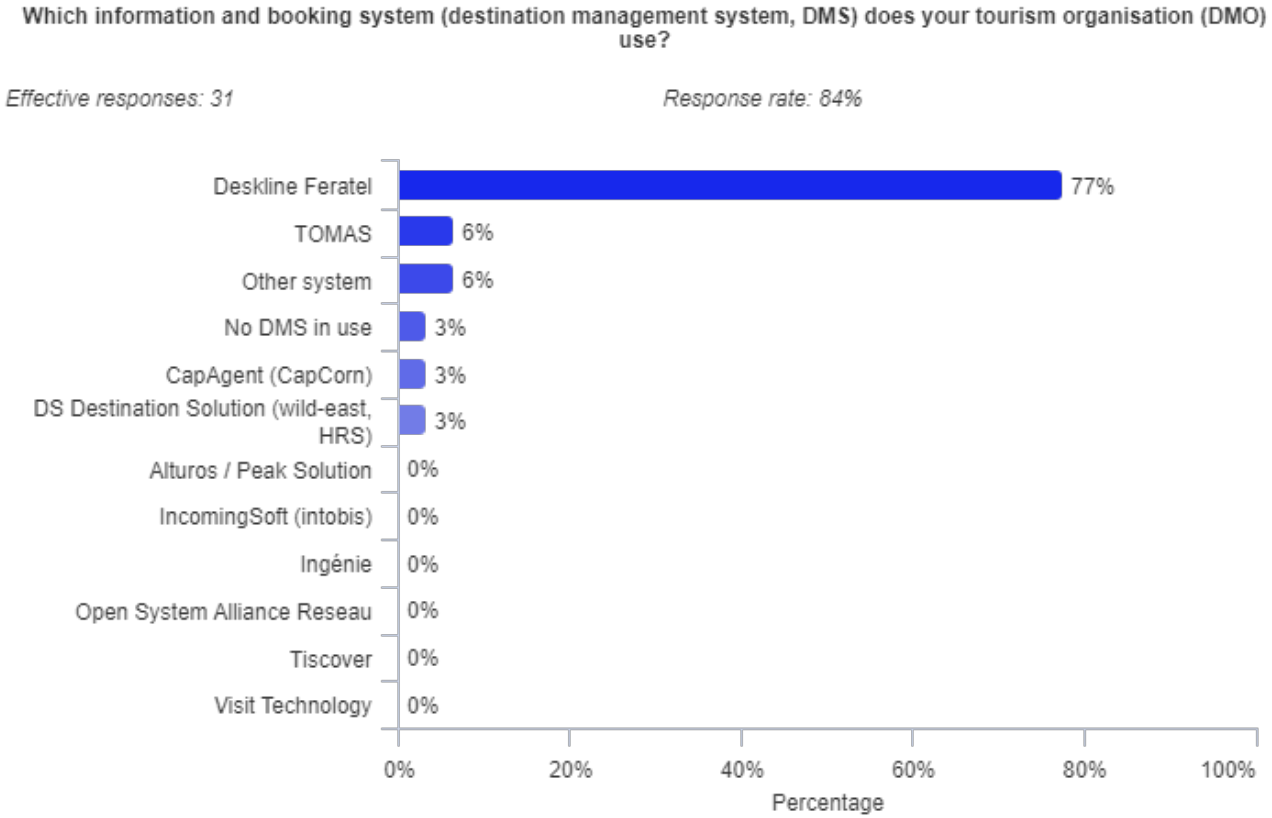
Contribution of DMOs to tourist overnight stays: Austria

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

Effective responses: 22
Median: 3.0
Mean: 4.3
Min - Max: 0.0 - 20.0



DMS used: Austria



The DMS landscape in Austria is characterized by a very high concentration around a dominant player, Deskline Feratel, used by nearly 80% of DMOs. This near-standardization reflects a highly structured and integrated ecosystem, facilitating coordination, data sharing, and the efficiency of distribution processes.

Alternatives remain marginal (TOMAS, CapAgent, other systems). This contrasts with other, more fragmented countries and confirms the central role of an integrated national DMS as the backbone of the Austrian tourism system.

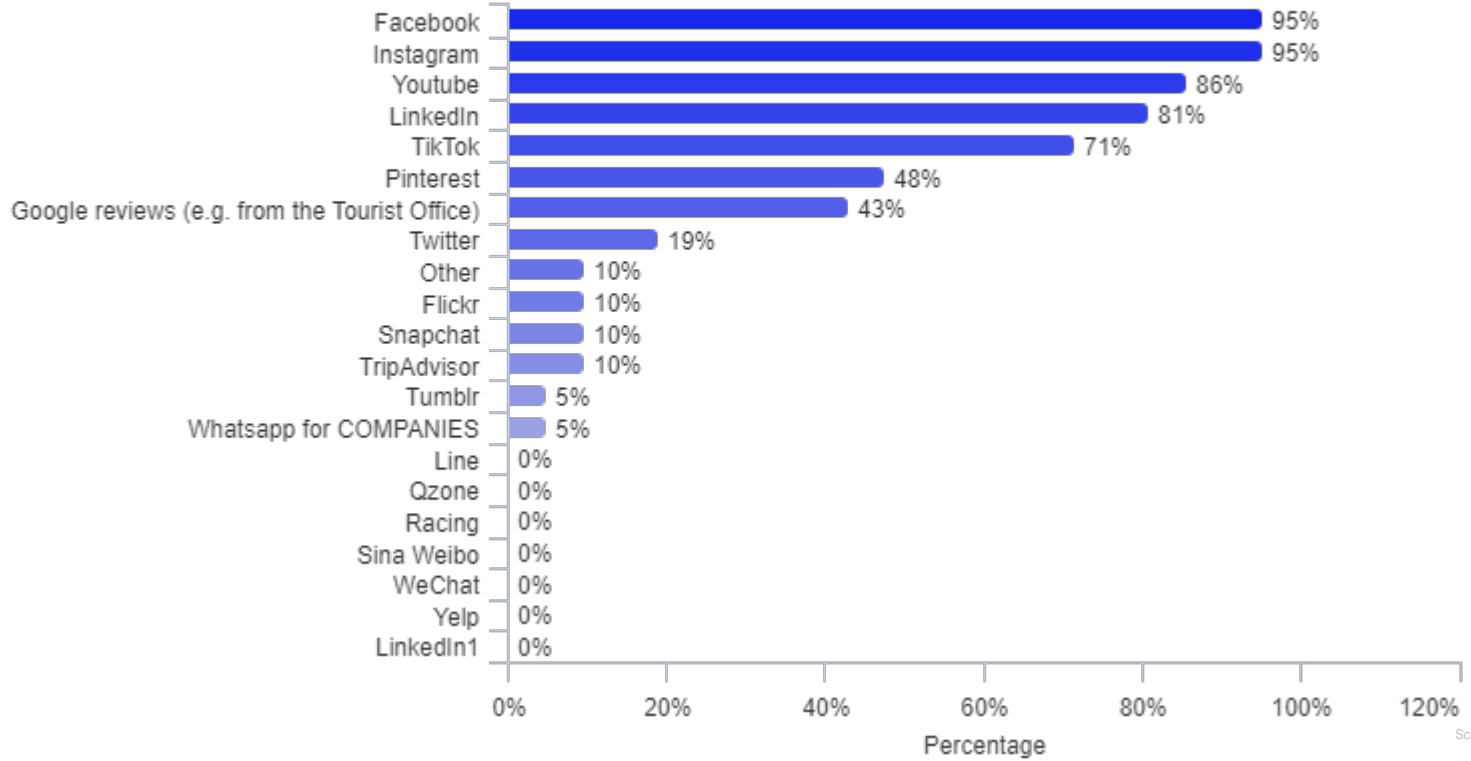


The Use of Social Media in DMOs in Canada

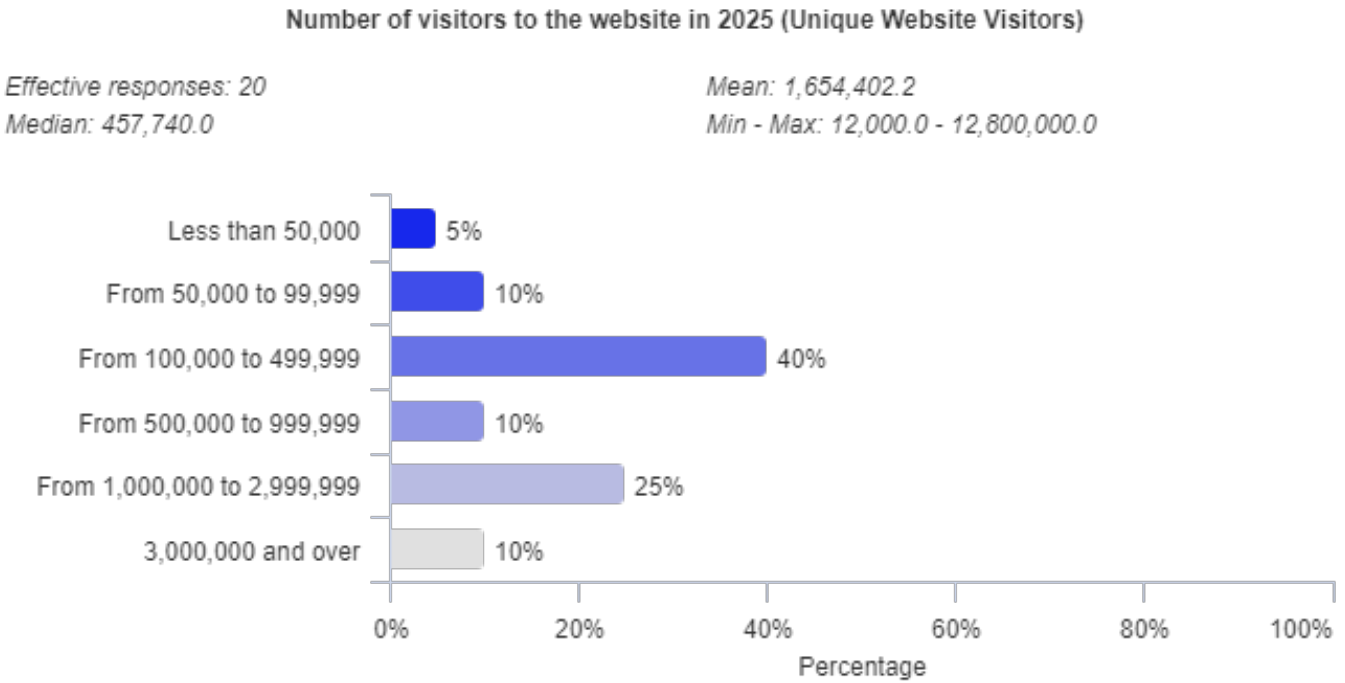
On which social media/platforms is your organization actively present?

Effective responses: 21

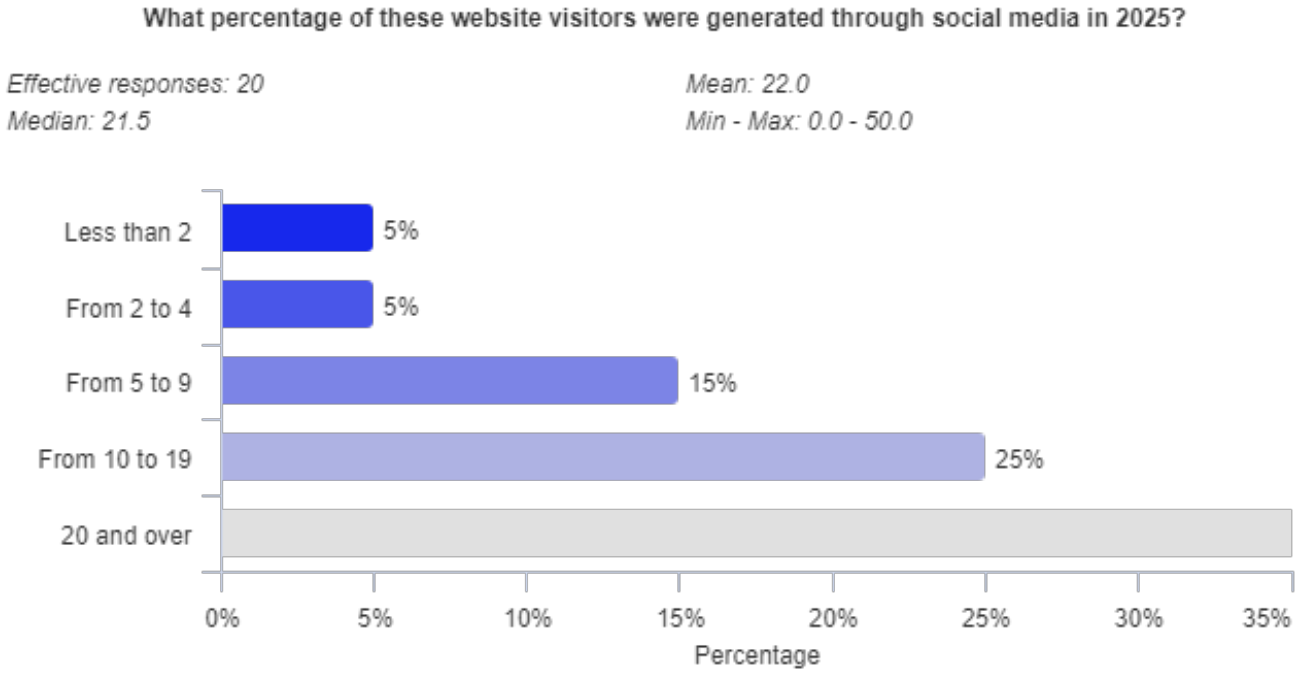
Response rate: 100%



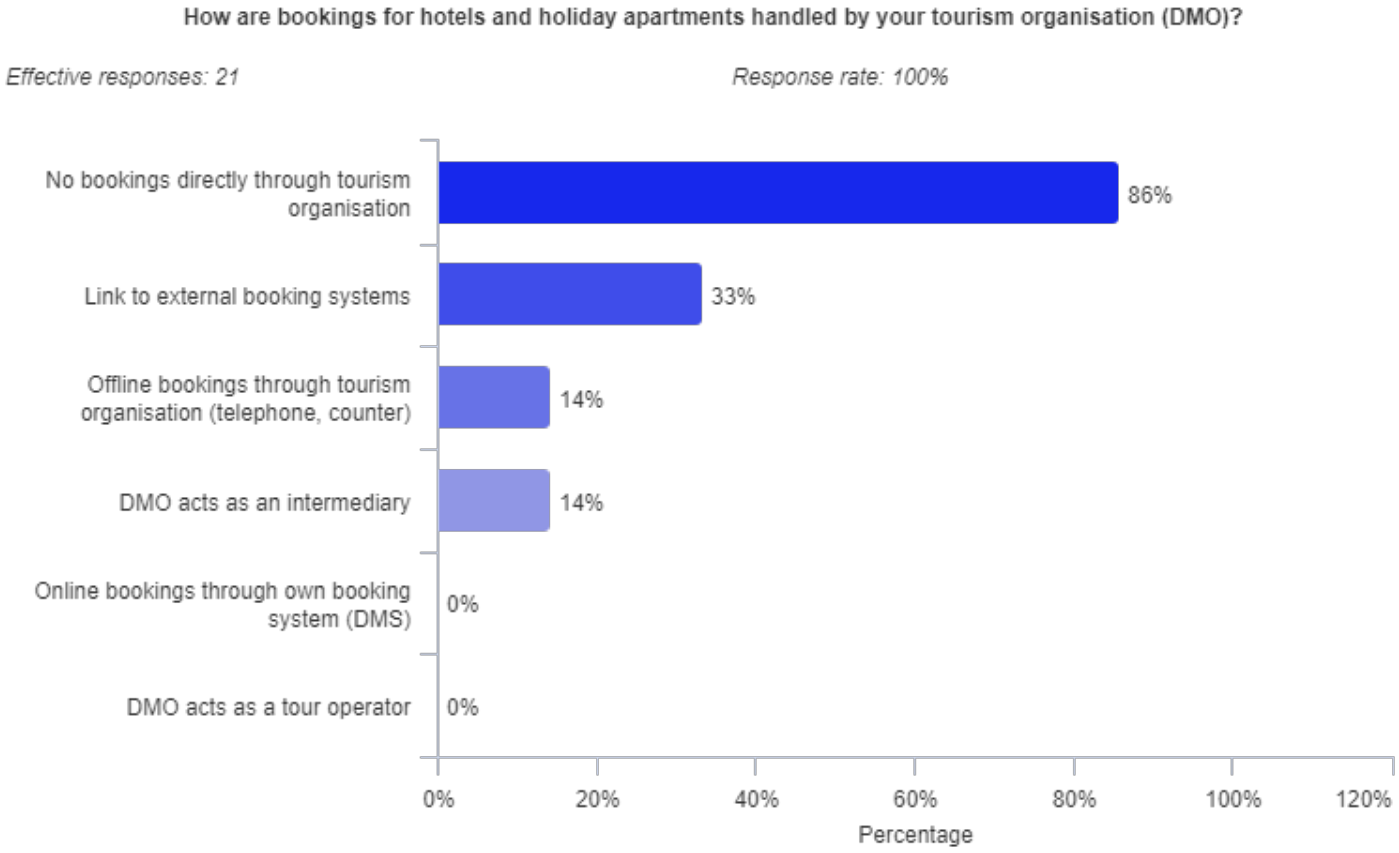
Number of website visitors in 2025 for DMOs in Canada



Percentage of website visitors generated via social media in 2025: Canada



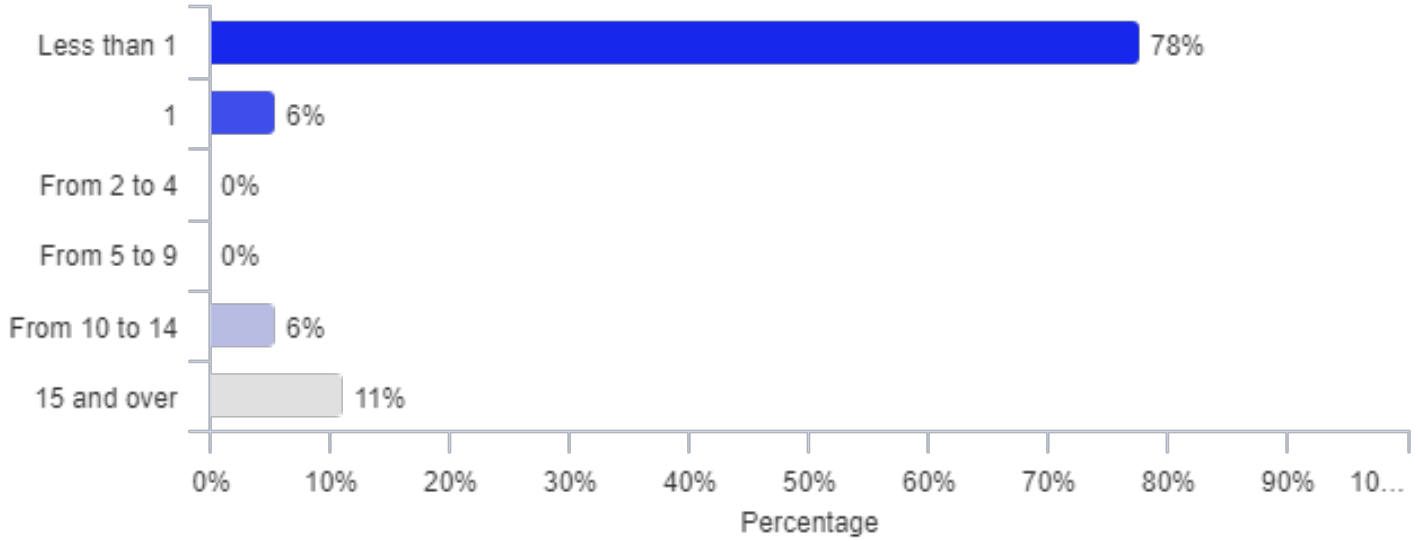
The Role of DMOs in Tourism Distribution: Canada



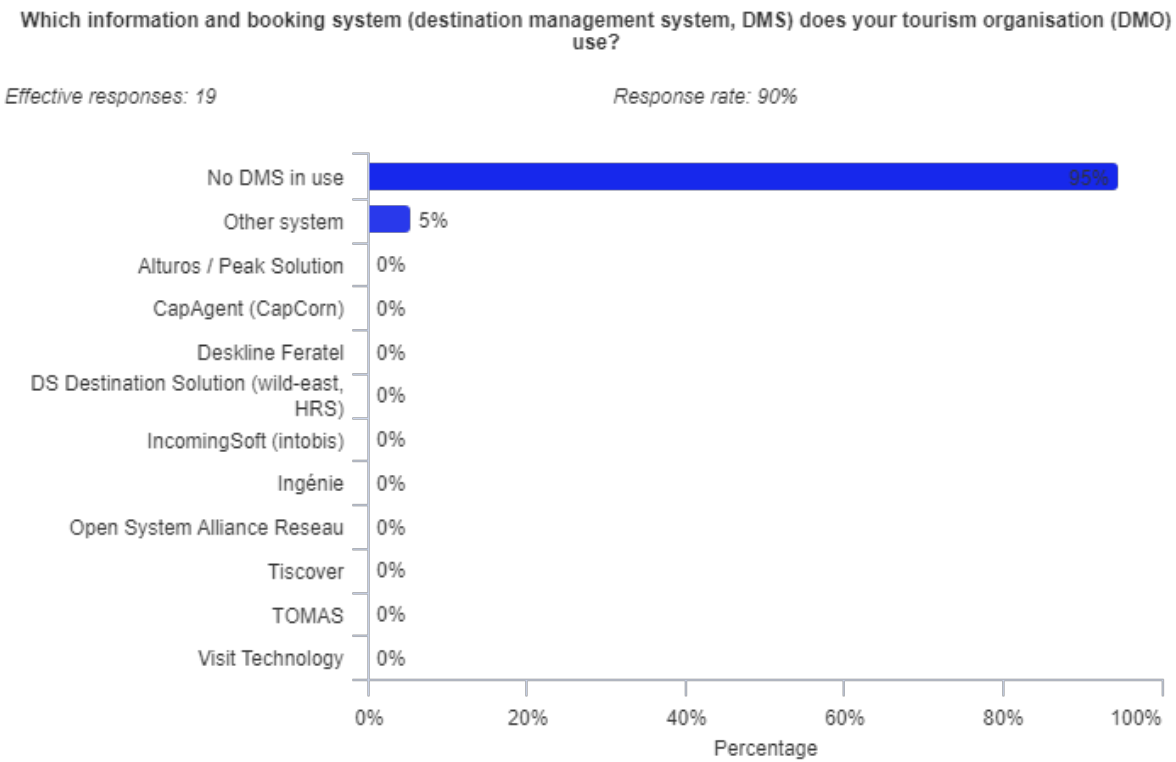
Contribution of DMOs to tourist overnight stays: Canada

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

Effective responses: 18
Median: 0.0
Mean: 7.8
Min - Max: 0.0 - 100.0



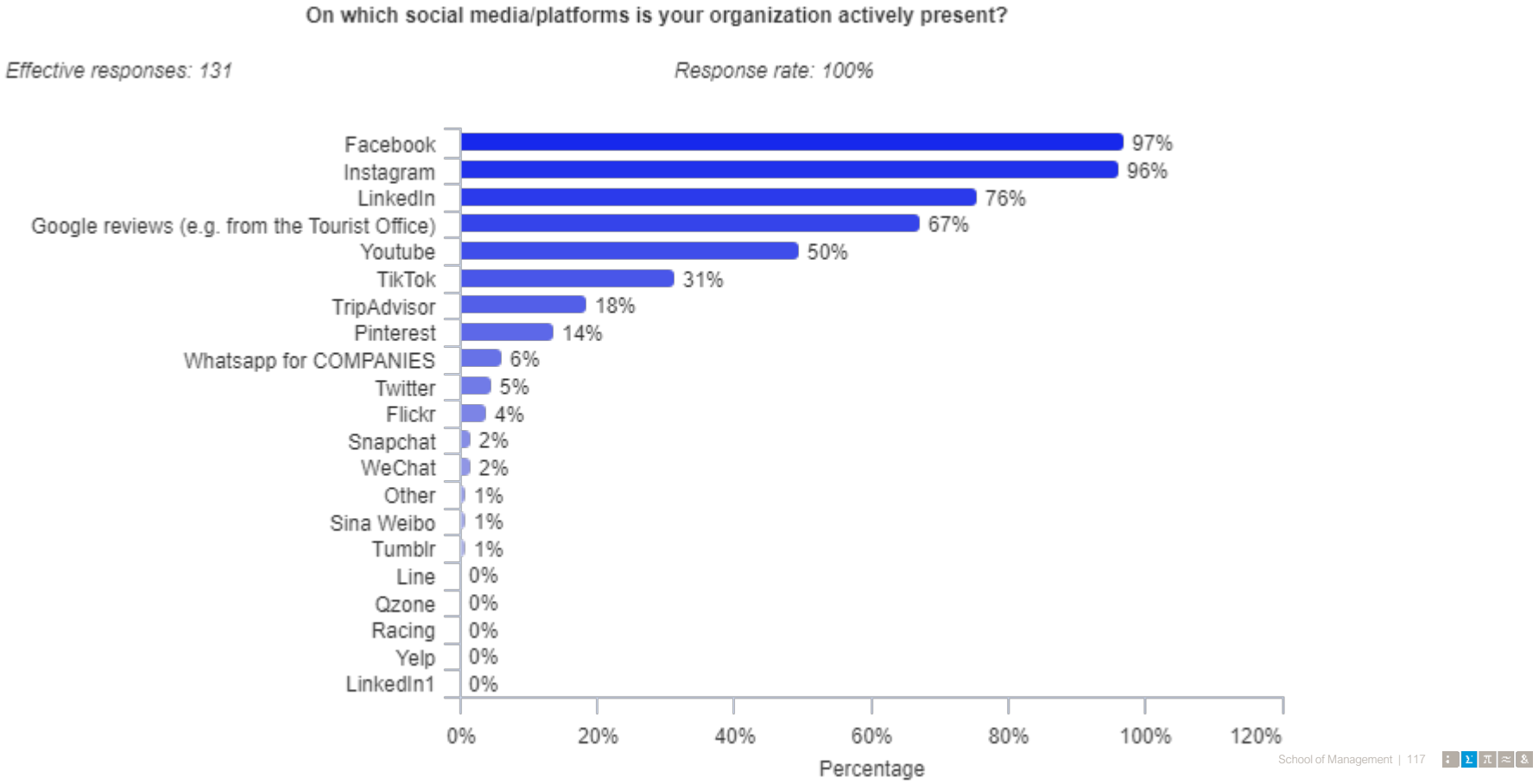
DMS used: Canada



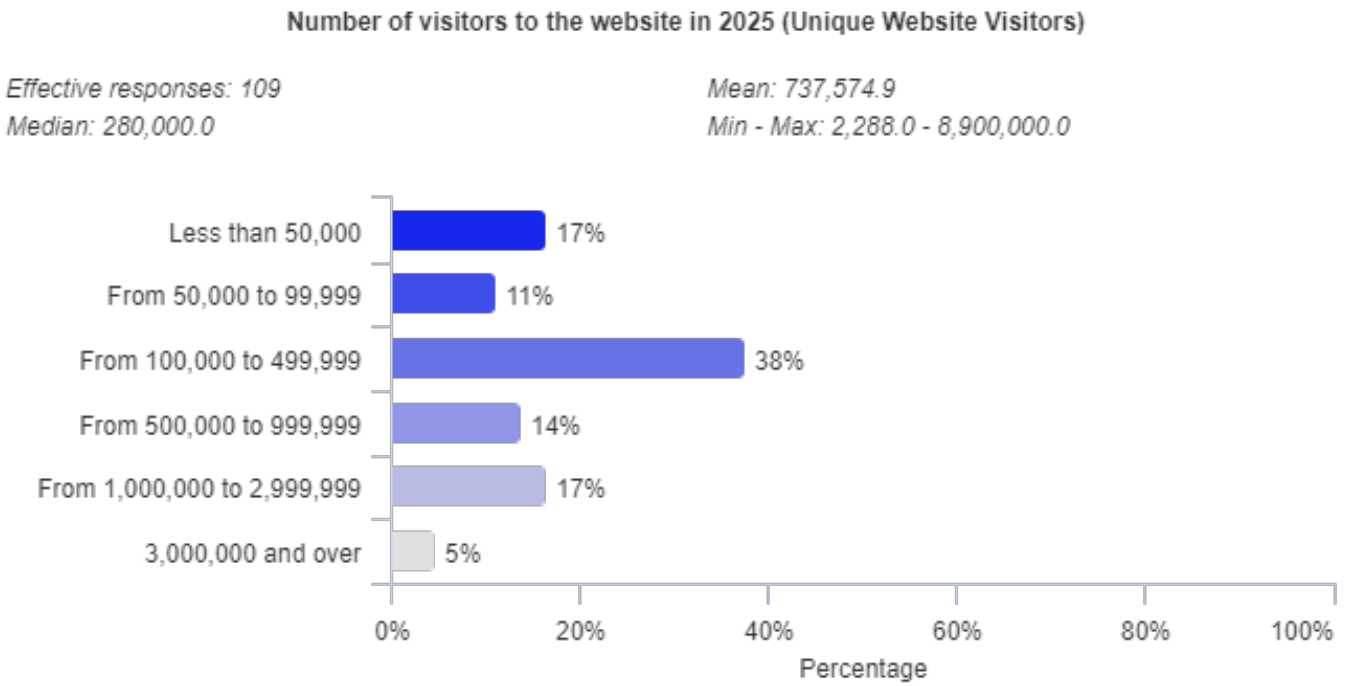
The Canadian case is distinguished by an almost total absence of structured DMSs, with 95% of DMOs reporting that they do not use a reservation system. The few identified cases rely on ad-hoc solutions or in-house developments, with no common standard. This confirms a model strongly oriented toward promotion and visibility, where the transactional function is largely outsourced or absent, in sharp contrast to more integrated ecosystems such as Austria.



The Use of Social Media in DMOs in France



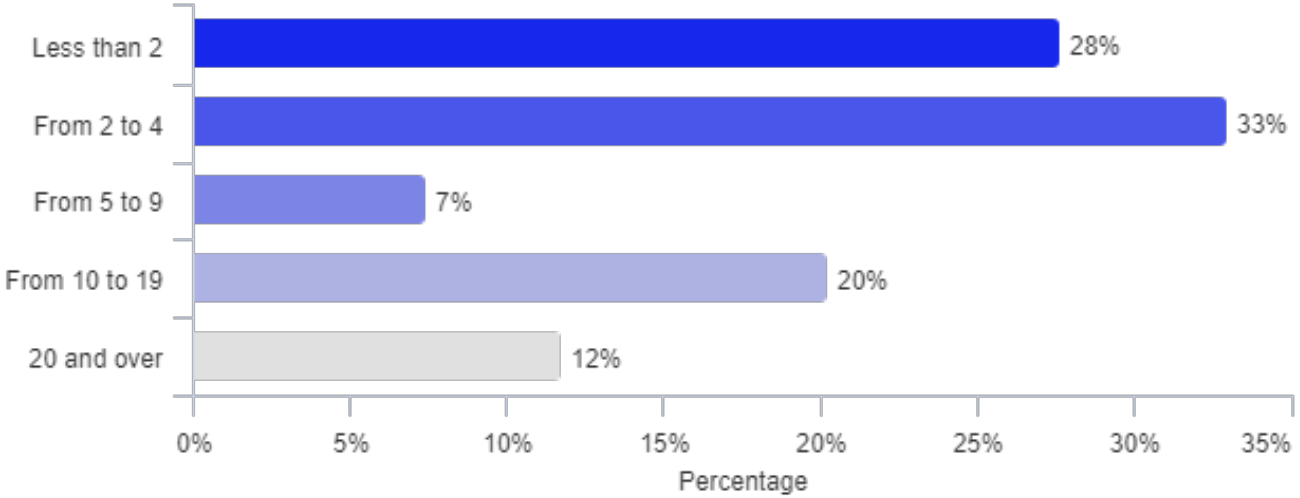
Number of website visitors in 2025 for DMOs in France



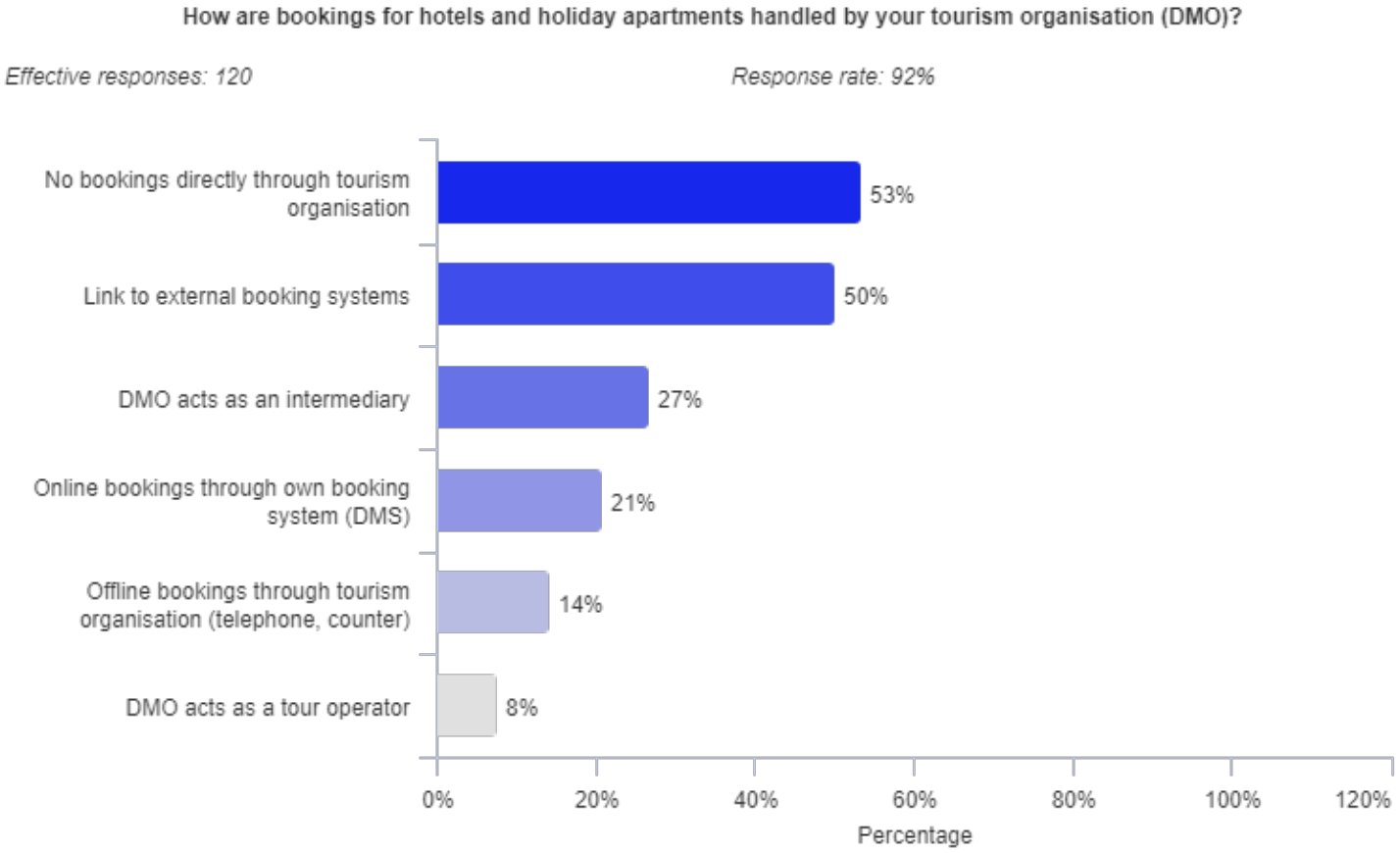
Percentage of website visitors generated via social media in 2025: France

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

Effective responses: 94
Median: 3.0
Mean: 8.4
Min - Max: 0.0 - 70.0



The Role of DMOs in Tourism Distribution: France

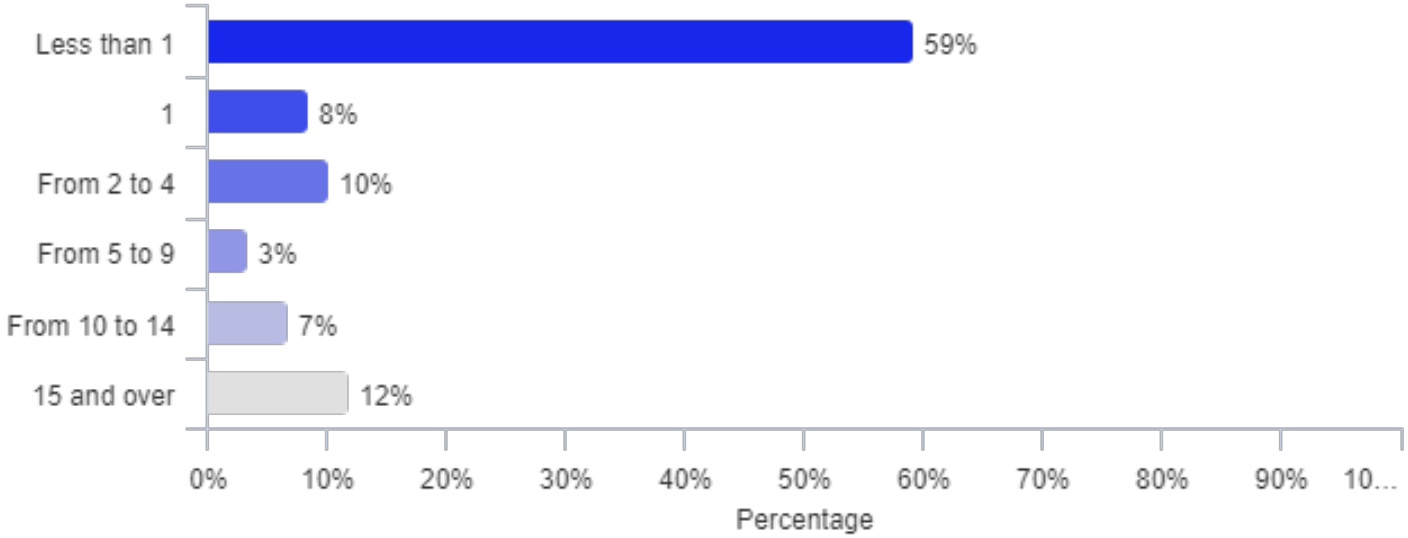


Contribution of DMOs to tourist overnight stays: France

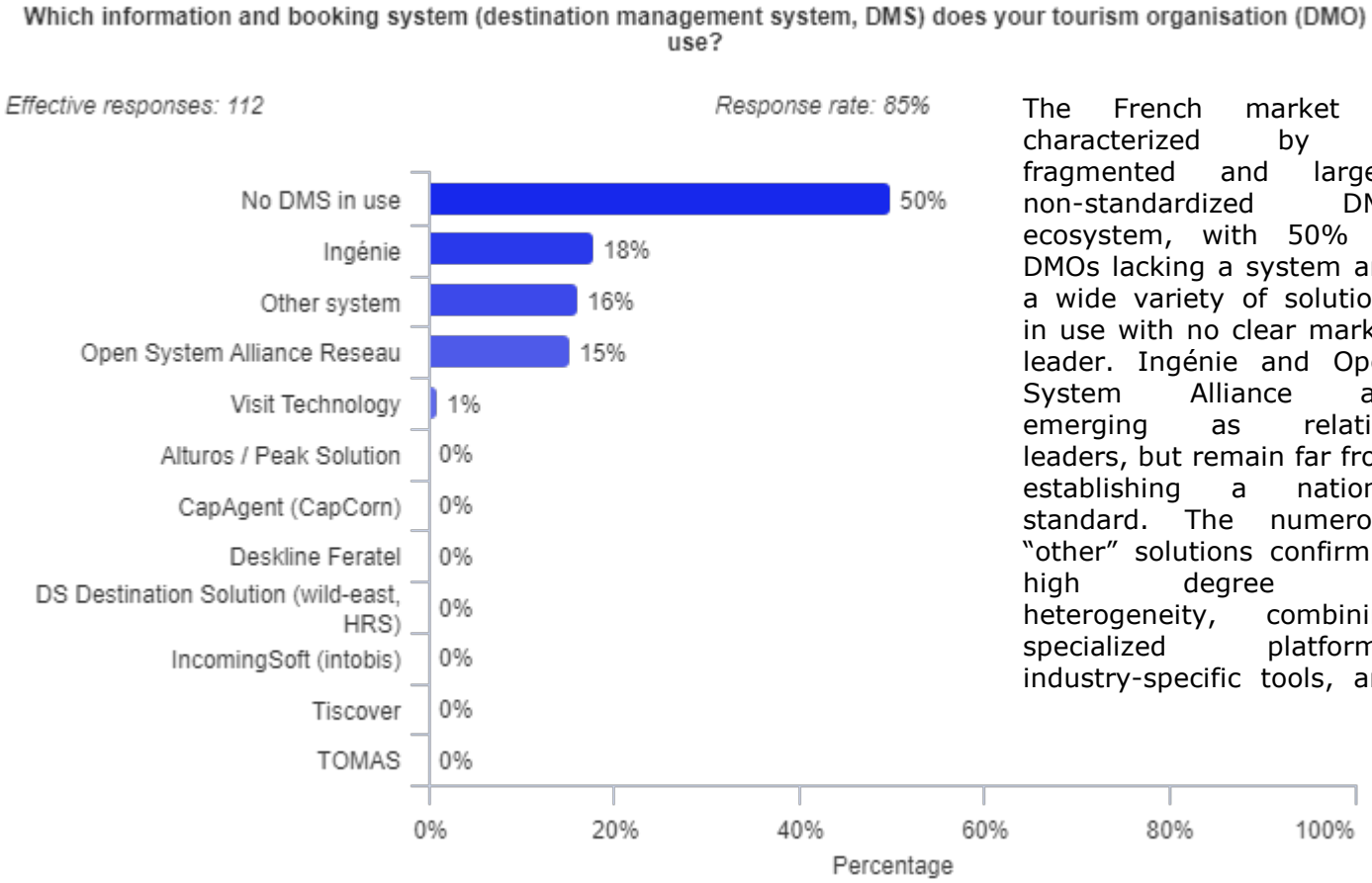
What percentage of total overnight stays are booked through the tourism organisation (DMO)?

Effective responses: 59
Median: 0.0

Mean: 4.1
Min - Max: 0.0 - 35.0



DMS used: France

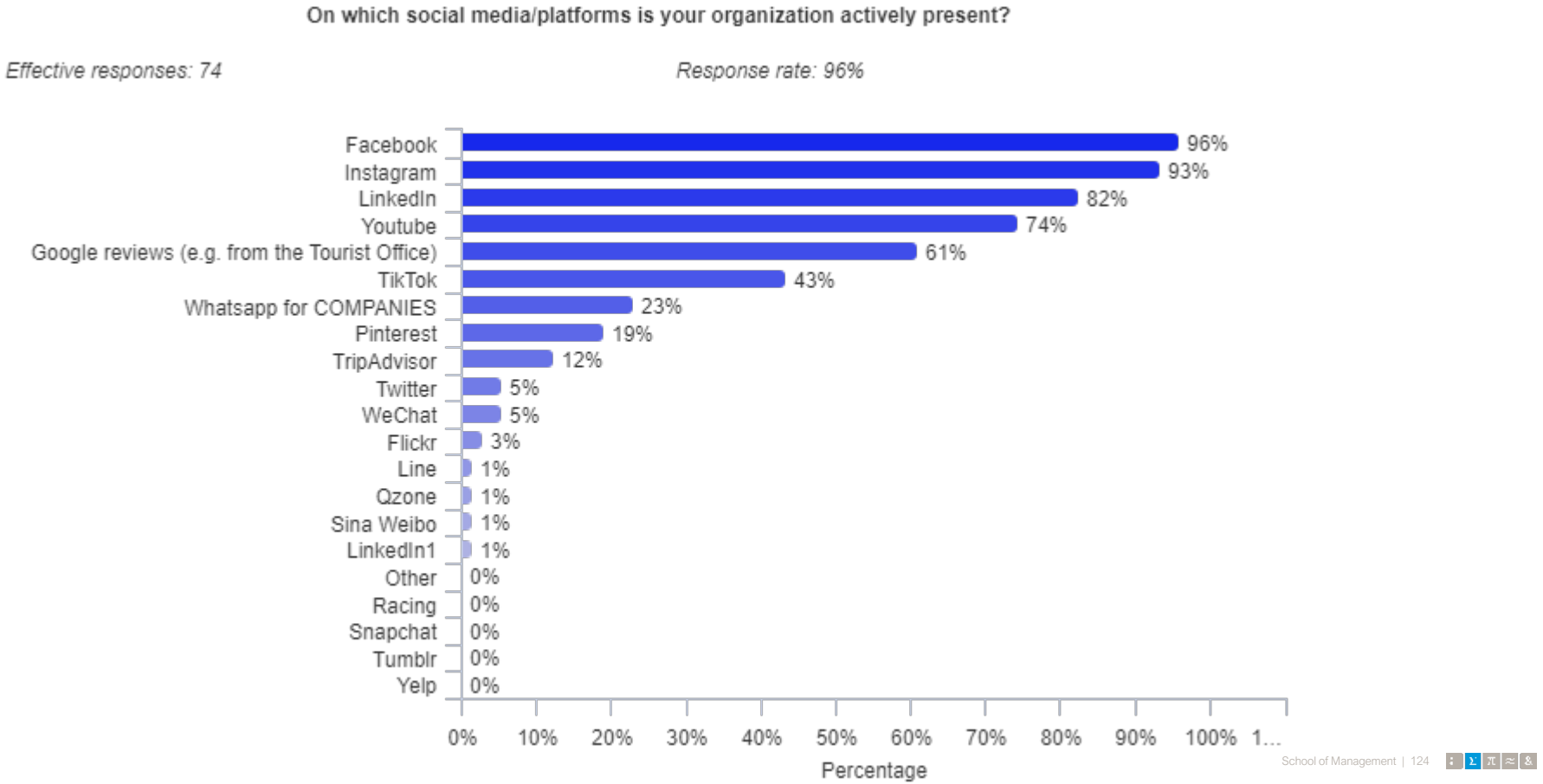


The French market is characterized by a fragmented and largely non-standardized DMS ecosystem, with 50% of DMOs lacking a system and a wide variety of solutions in use with no clear market leader. Ingénie and Open System Alliance are emerging as relative leaders, but remain far from establishing a national standard. The numerous "other" solutions confirm a high degree of heterogeneity, combining specialized platforms, industry-specific tools, and custom developments. This reflects a hybrid model, where the distribution function is partially integrated but remains largely dispersed and dependent on multiple solutions.

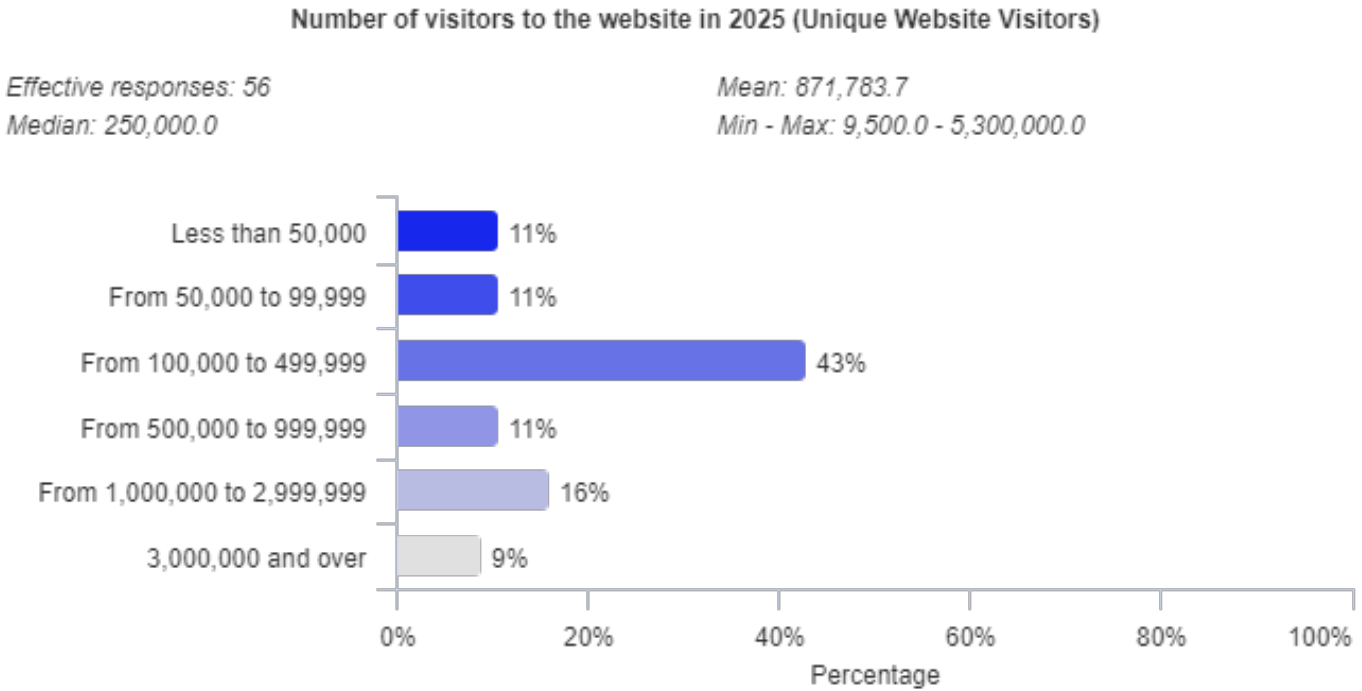
- Eloha (4 mentions)
- Aloha (2)
- Apidae
- Consonance Web
- Constellation
- Eloha (2)
- My Stay in the Mountains
- Orchestra
- Regiondo
- WEEBNB
- Welogin



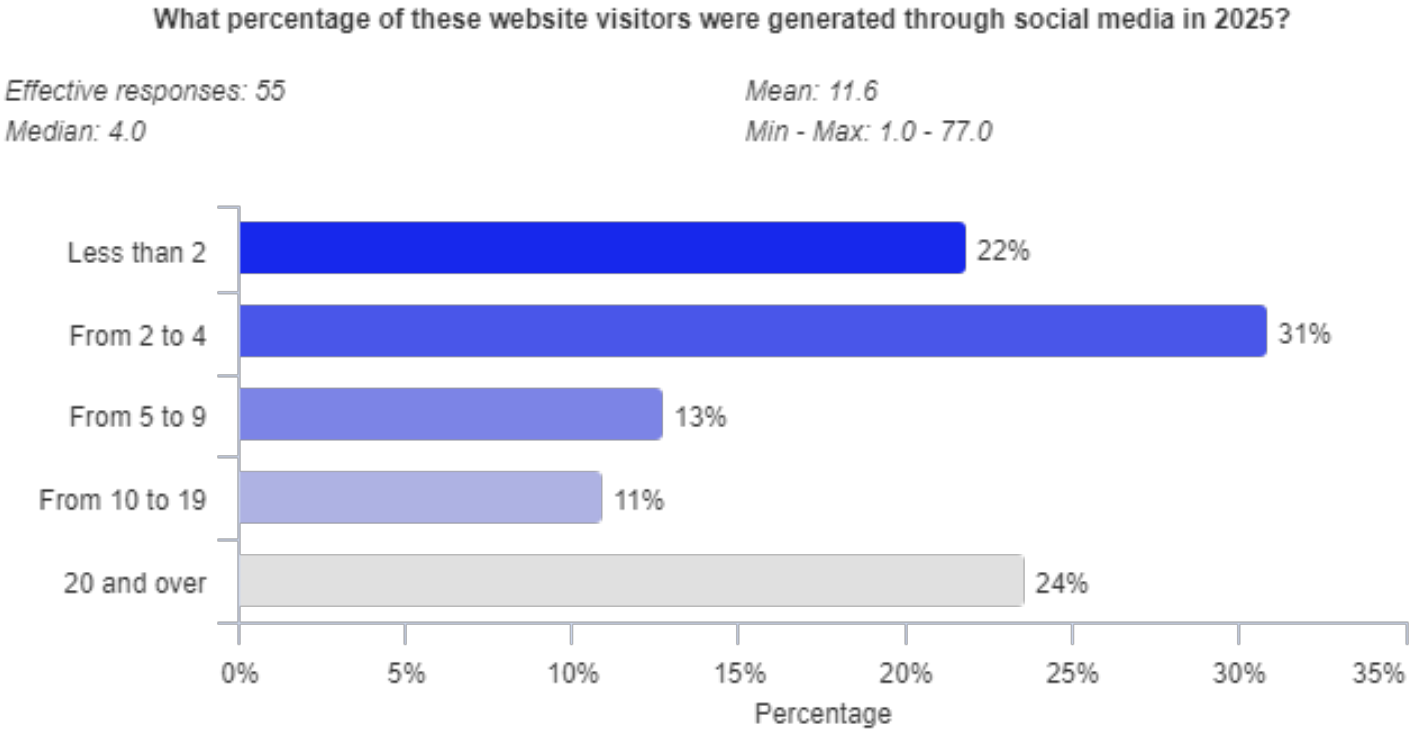
The Use of Social Media in DMOs in Switzerland



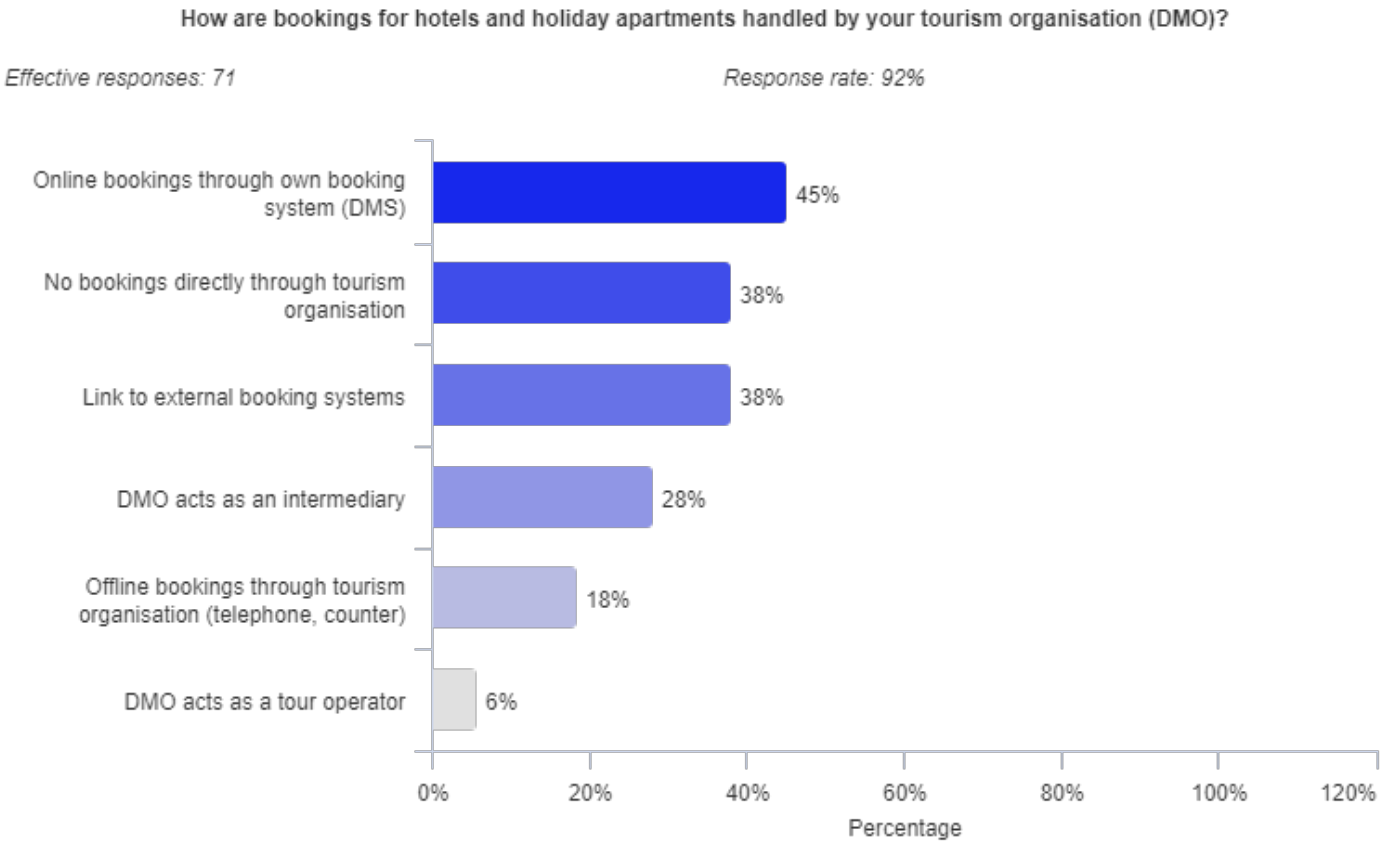
Number of website visitors in 2025 for DMOs in Switzerland



Percentage of website visitors generated via social media in 2025: Switzerland



The Role of DMOs in Tourism Distribution: Switzerland

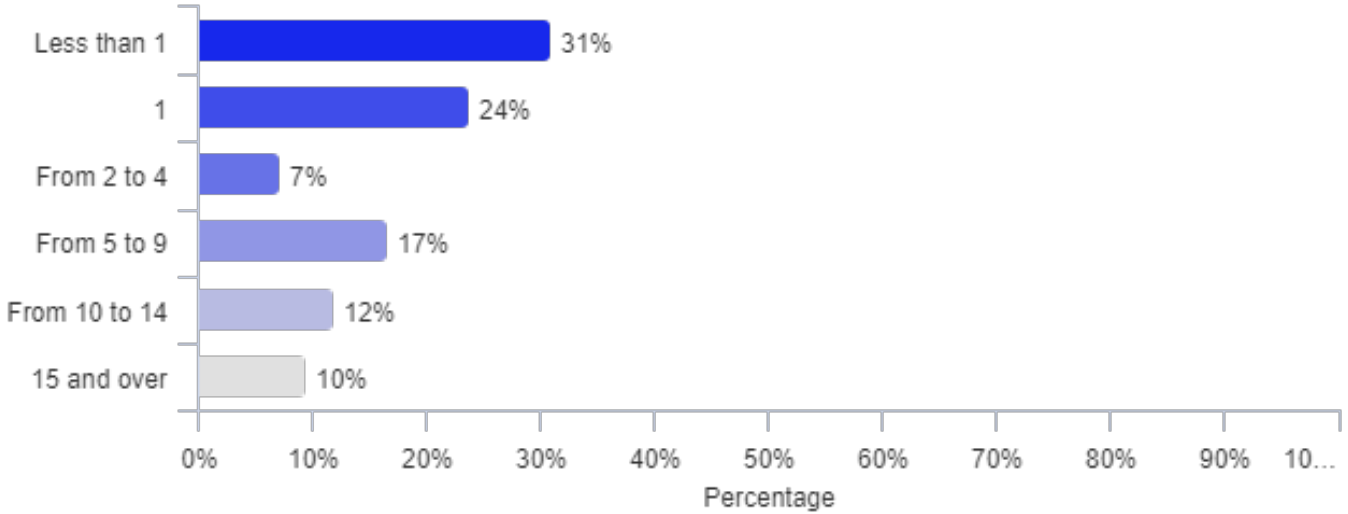


Contribution of DMOs to tourist overnight stays: Switzerland

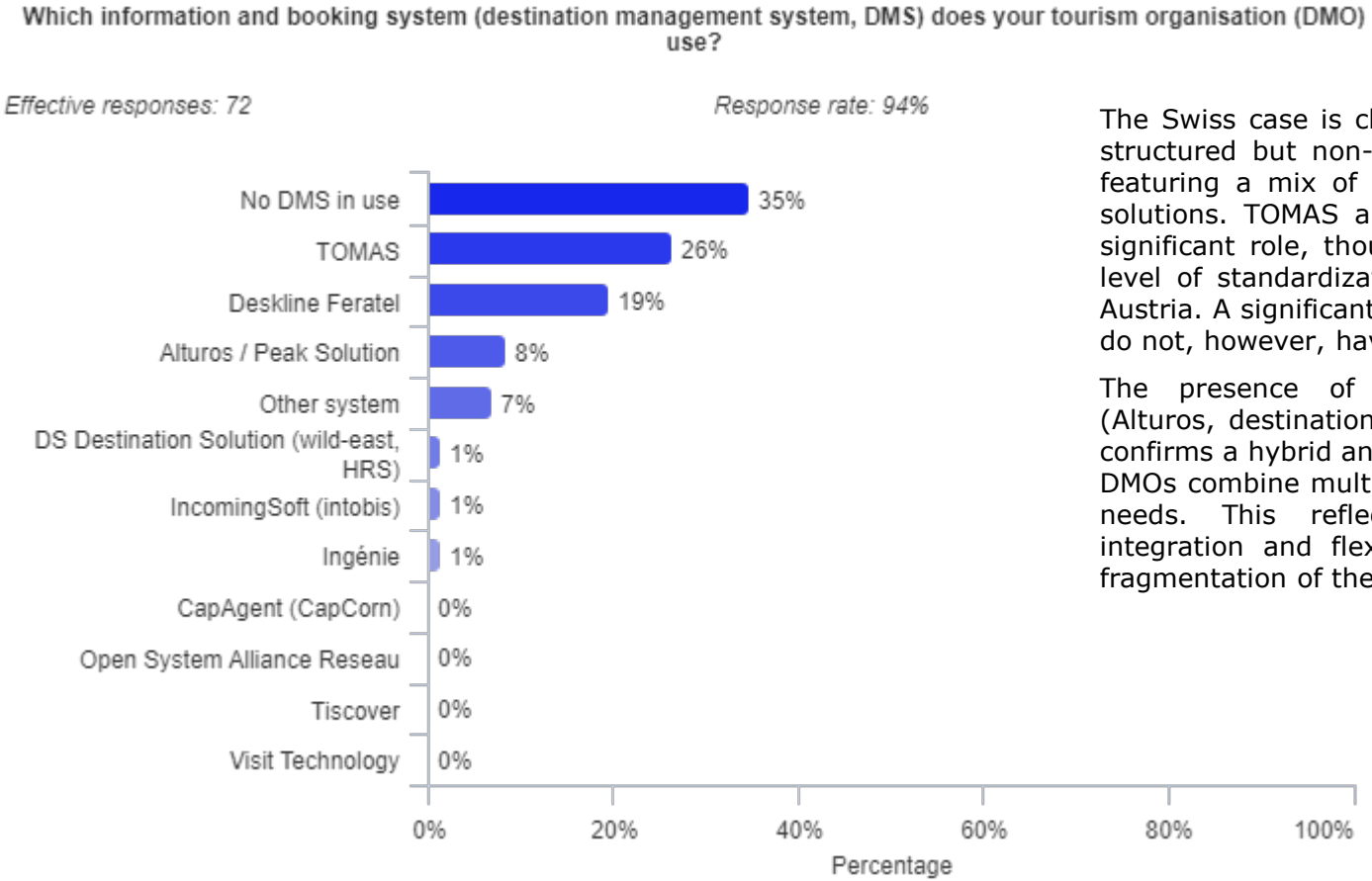
What percentage of total overnight stays are booked through the tourism organisation (DMO)?

Effective responses: 42
Median: 1.0

Mean: 6.0
Min - Max: 0.0 - 85.0



DMS used: Switzerland



The Swiss case is characterized by a relatively structured but non-dominant DMS ecosystem, featuring a mix of domestic and international solutions. TOMAS and Deskline Feratel play a significant role, though they do not achieve a level of standardization comparable to that in Austria. A significant proportion of DMOs (35%) do not, however, have a DMS.

The presence of complementary solutions (Alturos, destination.one, e-Guma, Odoo, etc.) confirms a hybrid and modular approach, where DMOs combine multiple tools according to their needs. This reflects a balance between integration and flexibility, but also a certain fragmentation of the landscape.