Digital Transformation of Tourism Organizations by 2025

International Series of Surveys on DMOs (4 reports)

Report 2

Strategic Priorities, Digital Transformation Projects, and Innovation Dynamics of 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 (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 second 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) — Strategic and Business Challenges in the Digital Age

The results show that DMOs are facing **rapid transformation** in their digital environment. Online **visibility remains the primary strategic challenge** in the four countries studied, but this visibility no longer depends solely on search engines and social media. DMOs are increasingly citing challenges related to platforms, LLMs, AI Overviews, and GEO (Generative Engine Optimization).

Tourism organizations must simultaneously manage:

- the rapid evolution of digital usage,
- competitive pressure from major platforms,
- system fragmentation,
- visitors' rising expectations,
- and the rise of artificial intelligence.

The findings also highlight a significant gap between awareness of upcoming disruptions and organizations' actual ability to respond to them. Challenges related to data, skills, interoperability, and human resources remain central in all countries.

Executive Summary (3) — Current Projects and Future Digital Transformation Initiatives

The **projects currently** being carried out by DMOs focus primarily on four areas: data, new technologies, artificial intelligence, and digital marketing. In all four countries, organizations are investing in CRM systems, data platforms, marketing automation, chatbots, AI tools, and digital content.

National differences, however, reflect distinct levels of maturity and institutional structures. Austria appears more advanced in the integration of digital systems and infrastructure. Switzerland remains strongly focused on marketing and visibility. France stands out for its strong momentum in GEO, generative AI, and digital marketing, while Canada is developing a more strategic approach centered on customer experience and the added value of DMOs.

Future transformation initiatives increasingly focus on: data structuring and utilization, the integration of AI into processes and customer relations, automation, personalization, and discoverability in AI-driven environments.

The study shows, however, that the **majority of DMOs still operate primarily from an operational and tool-oriented perspective**. Truly integrated approaches—linking data, automation, CRM, AI, and organizational strategy—remain limited.

Executive Summary (4) — Conclusion and Implications

The results suggest that DMOs are entering a new phase of digital transformation. Digital technology is no longer limited to communication or online presence, but is gradually becoming a **matter of infrastructure, governance, data, and integration into digital ecosystems dominated by platforms and artificial intelligence**.

Three main implications emerge from the study.

- First, **data quality, interoperability, and digital infrastructure** are becoming essential strategic assets for the future visibility of destinations in AI search engines and conversational systems.
- Second, **organizational challenges—skills, governance, partner support, and change management**—now appear to be more critical factors than the technologies themselves.
- Third, the **gap between large and small DMOs is likely to widen**. Large destinations have greater access to the resources needed to develop integrated platforms, leverage data, and integrate AI, while smaller organizations often remain focused on immediate operational needs.

Ultimately, the most successful DMOs of the future will likely be those capable of coherently integrating **data, AI, automation, customer experience, and coordination of their regional ecosystem**.

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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 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).

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 (I)

- 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.

Methodology – Analysis (II)

- To structure and interpret the open-ended survey responses, the analysis draws on the "**Digital Transformation Canvas**" (https://the-digital-transformation-canvas.com/action-fields/), which conceptualizes digital transformation as a multidimensional organizational process.
- Using this framework allows us to go beyond isolated technological issues and analyze how DMOs perceive digital transformation at the strategic, operational, and organizational levels within a rapidly evolving tourism ecosystem shaped by platforms, datafication, and artificial intelligence.

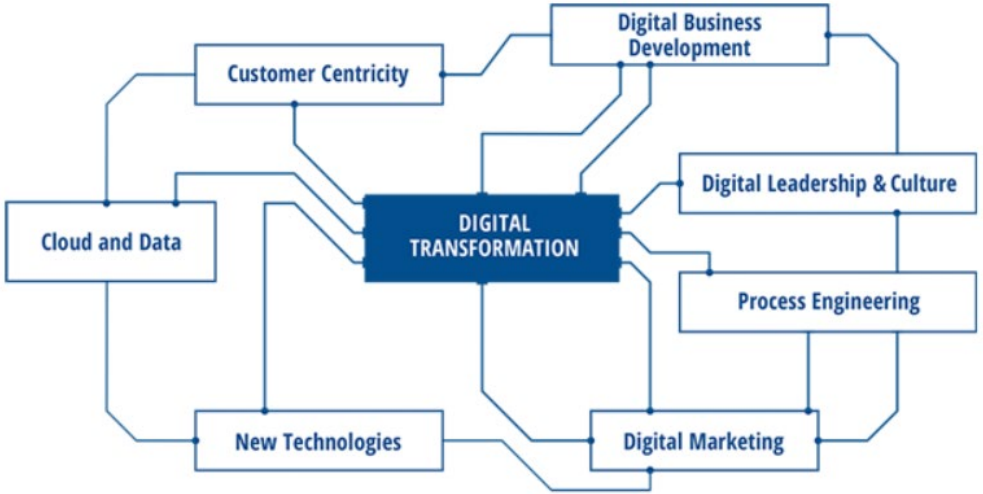


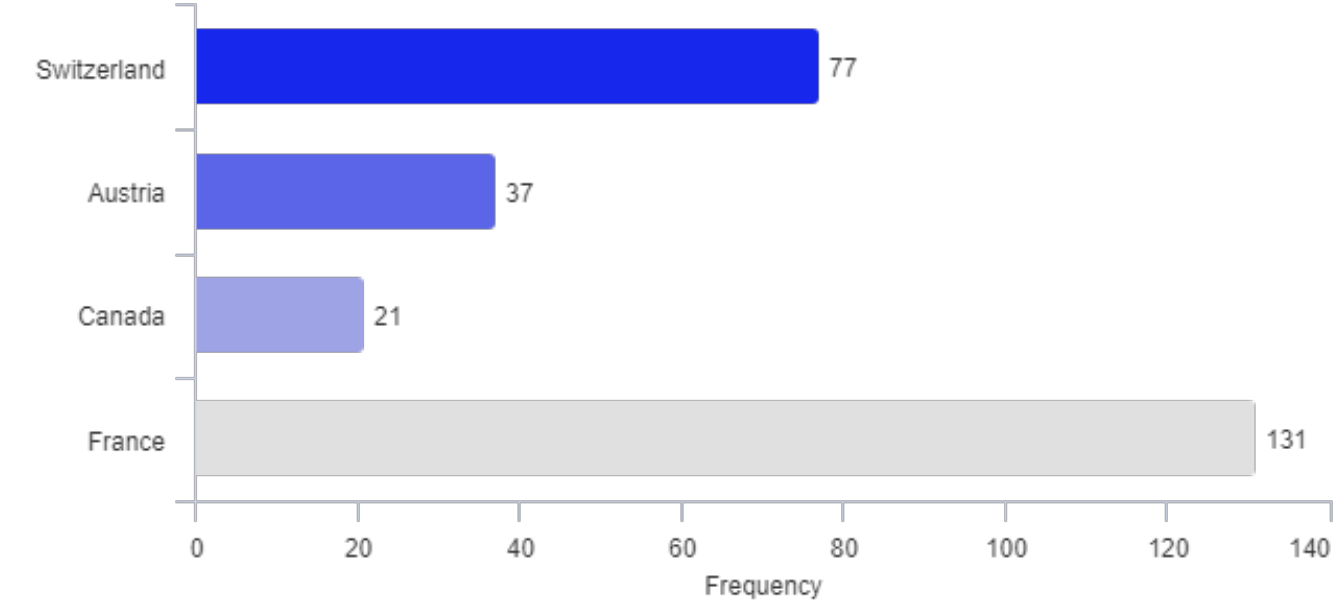
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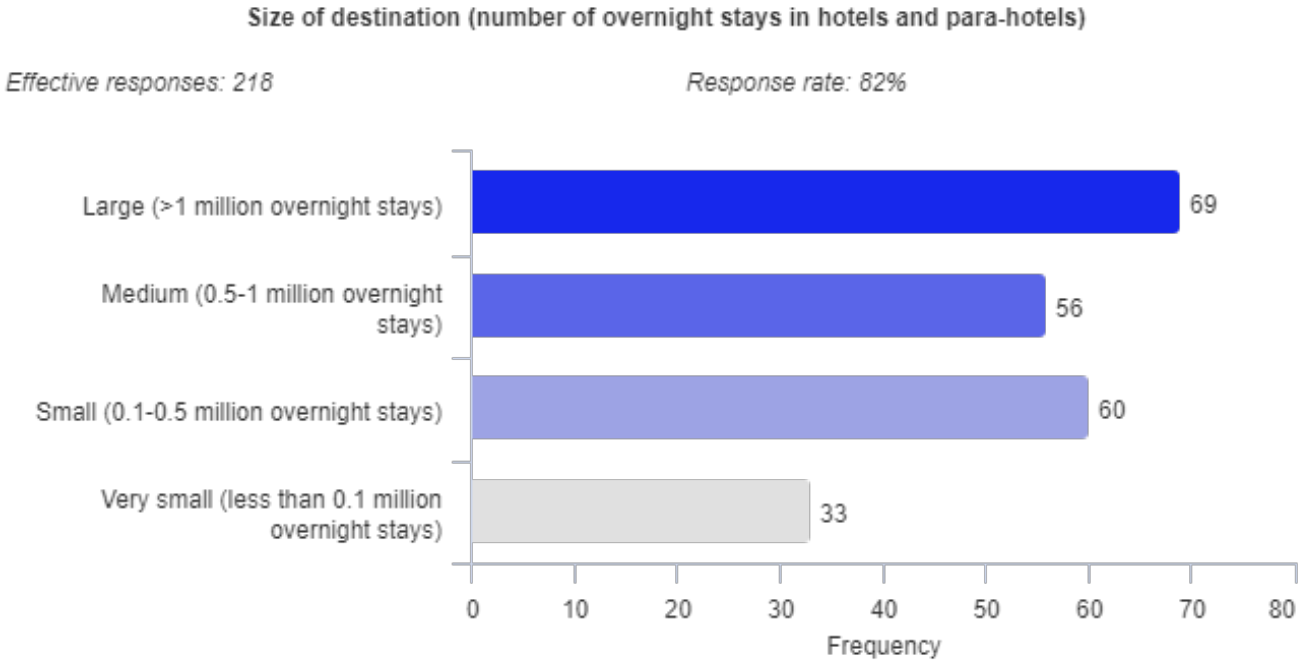
Sample: Country

Effective responses: 266

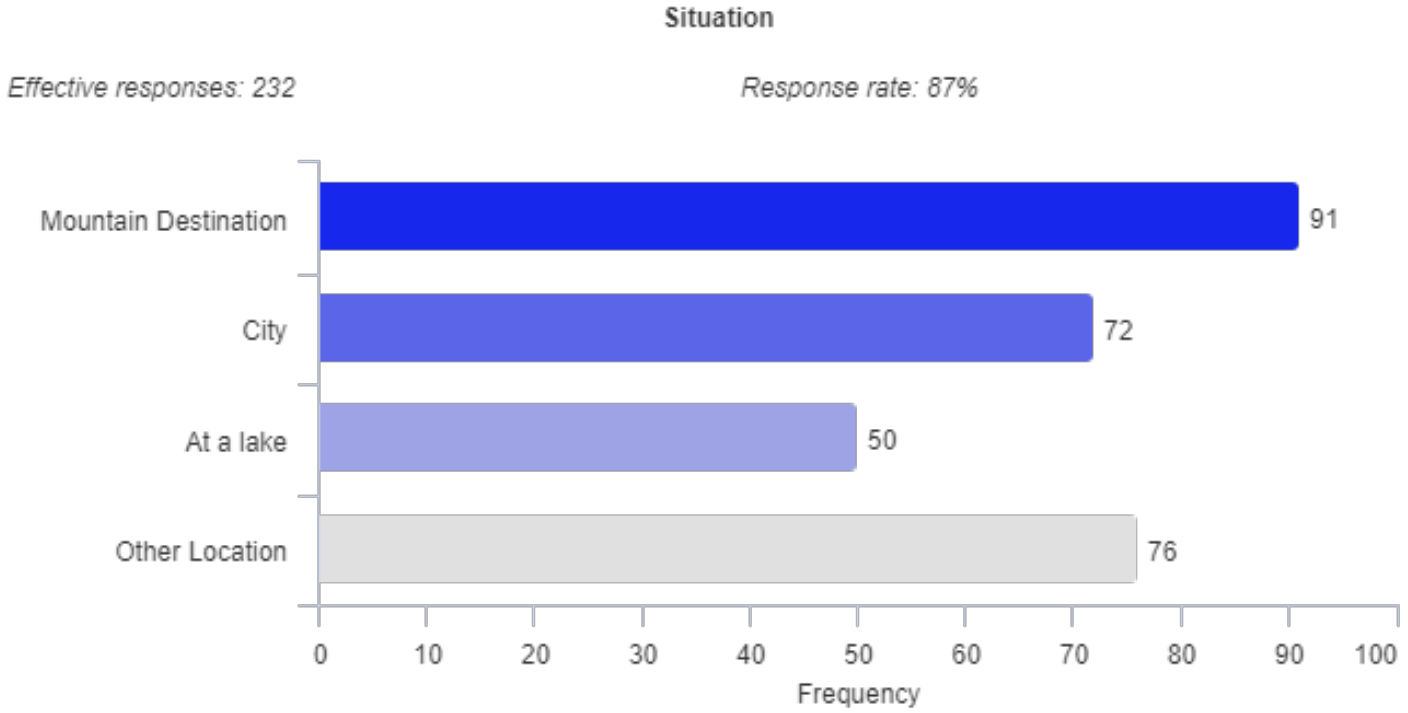
Response rate: 100%



Sample: DMO size



Sample: DMO Situation



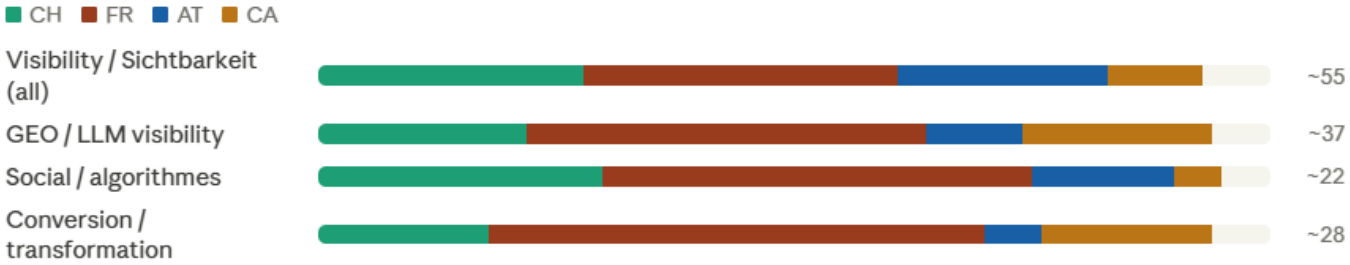
Strategic/Business Challenges in the Digital Age
(global sample, 4 countries)

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



Visibility is being shaped by three simultaneous factors: search engine optimization (SEO), social media, and now AI-powered search

Visibility is the most frequently cited concern across the four countries—but the nature of the problem has evolved. Traditional search engine optimization (SEO) is now a minimum requirement. Social media algorithms constitute the second front. And a third front—appearing correctly in responses generated by LLMs (GEO, generative engine optimization)—has emerged as important topic.



CH
"Perte de trafic via l'IA – Visibilité des contenus"

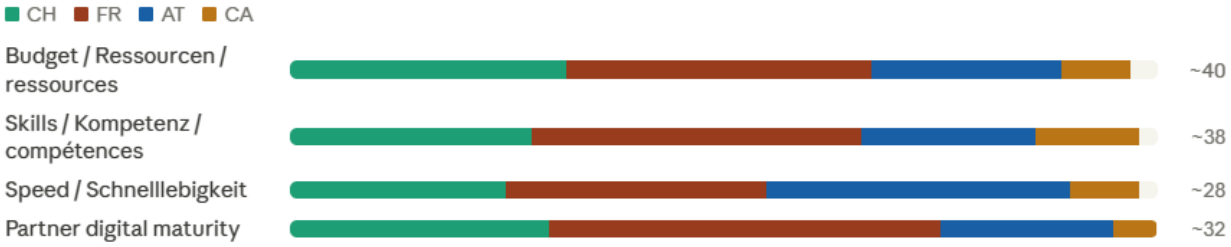
FR
"Faire vivre le site quand il est crawlé par les IA qui phagocytent les visites"

AT
"Die richtige Antwort im LLM der potentiellen Gäste zu sein"

CA
"Découvrabilité et mesure de l'impact des LLM"

The shortage of resources: skills, time, and money are all in short supply

All four countries cite **resource constraints as a major challenge**, but with different priorities. Switzerland frames this most explicitly as a problem of strategic prioritization: doing what needs to be done with limited resources. Austria emphasizes the recruitment and retention of skilled digital professionals. France extends the problem to its partner ecosystem: it is not only the DMO team that lacks skills; hotels, restaurants, and activity providers are also struggling to keep up. Canada is the most precise on the governance dimension: how to make the right strategic choices in the face of conflicting demands? The common observation: this is not a temporary budget shortfall, but a **structural mismatch between exponential digital complexity and stagnant organizational capacity**.



CH
"Das richtige mit den beschränkten finanziellen und personellen Ressourcen machen"

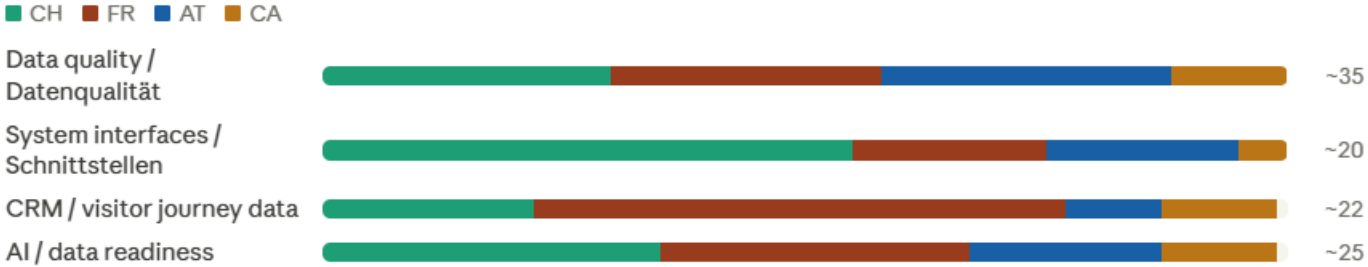
AT
"passende Mitarbeiter:innen zu finden (!)"

FR
"personnel assez âgé réticent à apprivoiser de nouveaux outils"

CA
"injonctions contradictoires" — contradictory demands

Data: collected — but static, siloed, and disconnected from AI capabilities

The second overarching theme concerns **data, systems, and interoperability as strategic infrastructure**. Many comments refer to data quality, obsolete or static data, a lack of interfaces, system heterogeneity, and issues related to document management systems (DMS), CRM, customer journey tracking, data warehouses, and reporting. This is particularly evident in Switzerland and Austria, where system integration and data quality appear to be operational bottlenecks, as well as in Canada and France, where searchability and AI visibility are linked to data structure and platform readiness.



CH
"System-Schnittstellen, Lizenzgebühren, Kommissionen"

AT
"statische Daten / nicht aktuelle Daten / nicht verfügbare Daten"

FR
"suivi des interactions visiteurs avant/pendant/après séjour"

CA
"La SUR-données (et son exploitation)"

Strategic/Business Challenges: Common Ground Among Countries

The four countries largely agree that **digital visibility has become more complex**, more competitive, and more dependent on algorithms. All emphasize the need to remain visible, relevant, and easy to find, even if the vocabulary used differs. Switzerland and Austria often use terms such as "visibility," "competition between platforms," "system interfaces," and "AI search ." Canada and France more explicitly mention "discoverability," "GEO," "LLMs," "AI-powered insights," and being cited by AI systems.

There is also **broad consensus that AI is no longer a distant topic**. It is viewed in all countries as both an operational opportunity and a strategic threat. Switzerland and Austria often approach AI from the perspective of process efficiency, automation, data quality, and operational implementation. Canada and France more often approach AI from the perspective of discoverability, visibility, content adaptation, GEO, and the evolution of the customer journey.

Strategic/Business Challenges: Differences Among Countries

The most striking difference concerns the role of marketing. Austria and Switzerland offer several comments on online booking options, proprietary booking platforms, marketplaces, guest cards, and maintaining local control over distribution. France also makes numerous comments on online sales, ticketing, marketplaces, and conversion, but often places greater emphasis on leisure activities, partner support, and local commercial autonomy. Canada, on the other hand, focuses less on distribution via destination management systems (DMS) and more on strategic positioning, visibility, added value, attribution, and the role of the destination management organization (DMO) in a changing ecosystem.

A **second difference concerns the perspective from which AI is viewed**. Canadian comments are particularly conceptual and strategic, with frequent references to value-added, narrative control, the visibility of large language models (LLMs), share of voice, attribution, and conflicting expectations. The French comments are highly operational and implementation-focused, emphasizing conversion, search engine optimization (SEO) and geographic targeting (GEO), partner digitization, training, marketplaces, online sales, and website traffic. The Swiss comments combine operational concerns with institutional and systemic issues, including data quality, interfaces, competition between platforms, and limited resources. The Austrian comments are strongly influenced by system integration, databases, operational AI, the ability to book online, and the challenge of integrating local service providers into digital processes.

Strategic/Business Challenges: Key Issues Raised by DMOs (I)

1. The comments raise a key initial question: **what will be the future role of DMOs if search, recommendation, and booking are increasingly managed by AI and platforms**? Some DMOs view themselves as sellers or marketplace operators, while others define their role as that of a visibility provider, facilitator, or ecosystem coordinator. This tension is evident throughout the data.
2. A second major question arises: **can DMOs establish the data and systems infrastructure necessary for their future visibility**? Many comments highlight the fragmentation of systems, poor data quality, lack of interfaces, lack of APIs, the static nature of data, and low interoperability. If AI-driven discovery depends on structured, reliable, and accessible data, then data infrastructure becomes a prerequisite for market visibility.
3. A third issue concerns **the risk of digital capability disparities**. Small DMOs and local organizations often cite constraints related to time, budget, staff, and expertise. The rapid pace of AI and platform development risks widening the gap between larger, better-resourced DMOs and smaller organizations struggling to keep up.

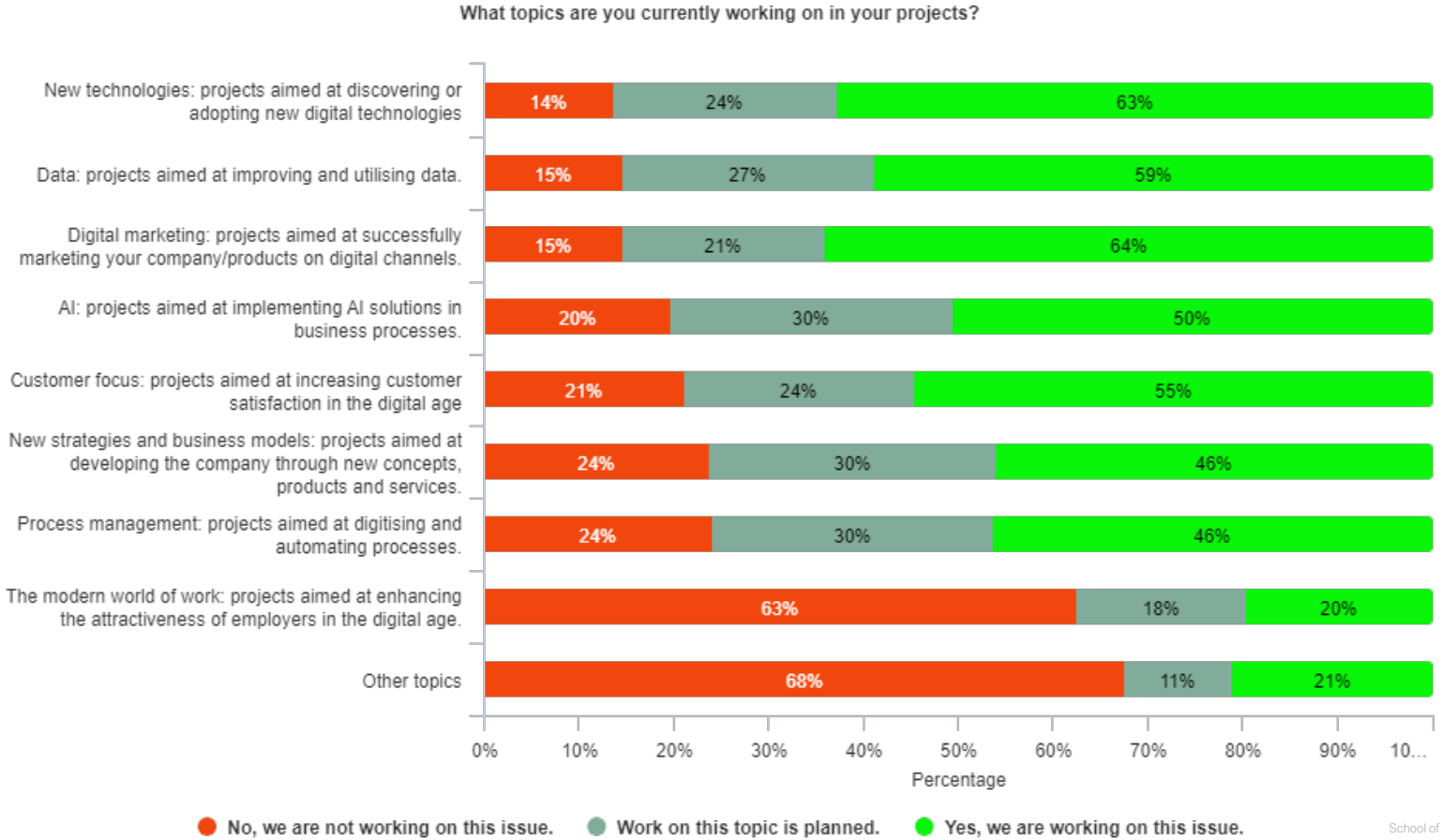
Strategic/Business Challenges: Key Issues Raised by DMOs (II)

4. A fourth question concerns how DMOs can **strike a balance between automation, authenticity, and human relationships**. Many comments advocate for efficiency, automation, and the integration of AI, while others emphasize credibility, authenticity, human contact, territorial identity, and the relationship with visitors. This tension is expected to grow in importance as AI tools become integrated into communication and service delivery processes.
5. Finally, the comments raise a **governance** issue: **who should coordinate digital transformation within the destination ecosystem**? Many challenges involve not only the destination management organization (DMO) but also partners, accommodation providers, municipalities, IT vendors, booking systems, and data-sharing agreements. This suggests that DMOs may increasingly need to act as orchestrators of the digital ecosystem rather than merely as marketing organizations.

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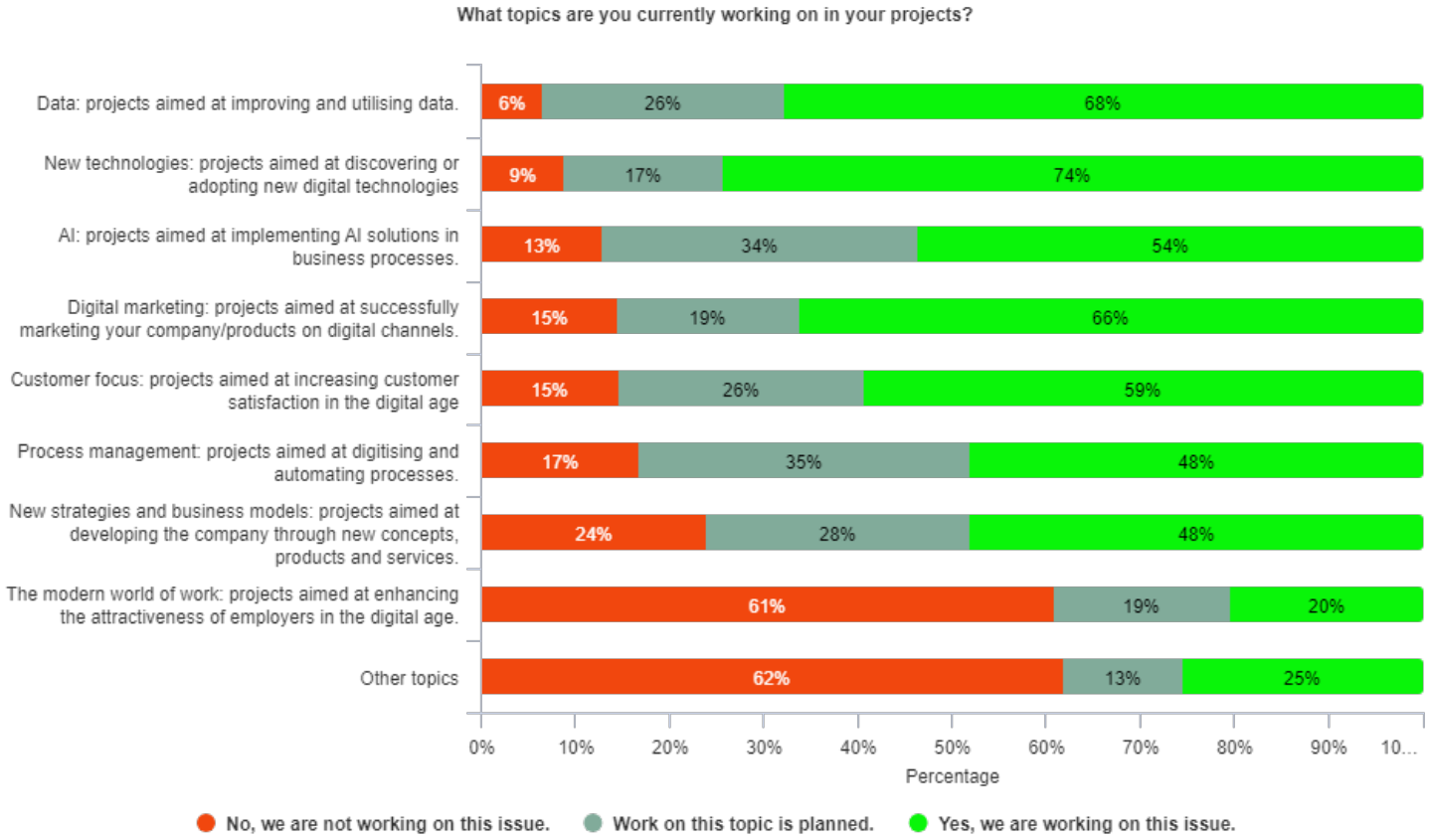
Current Digital Transformation Projects



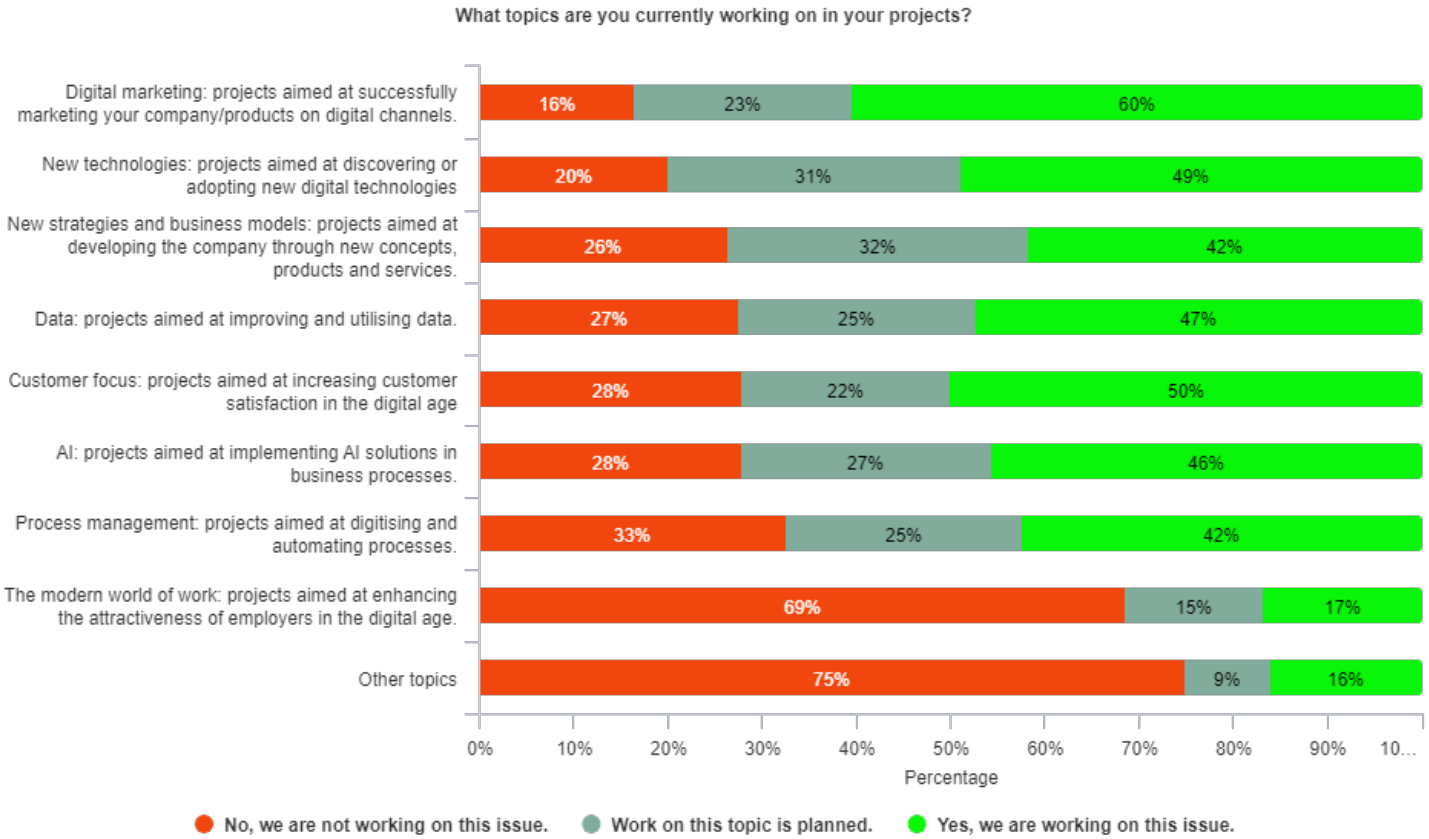
Current Digital Transformation Projects at DMOs

- The results show that DMOs are currently focusing their efforts primarily on **new technologies, data, digital marketing, and artificial intelligence**. More than half of the organizations surveyed report that they are already actively working on these topics.
- The priority given to data and digital technologies confirms that many DMOs are still in the **process of consolidating their digital infrastructure**: improving data utilization, process automation, CRM tools, AI, and digital marketing.
- Conversely, **topics related to the modern workplace (employer attractiveness, internal organization, new forms of work) remain significantly less developed.** This suggests that digital transformation is still primarily viewed from a technological and operational perspective rather than an organizational or cultural one.
- The results also reflect a strong focus on projects aimed at improving visibility, marketing, and customer relations, in a context marked by the rapid evolution of digital practices and AI-based platforms.

Current Digital Transformation Projects
(global sample, 4 countries, DMO > 500,000 overnight stays)



Current Digital Transformation Projects
(global sample, 4 countries, DMO < 500,000 overnight stays)



Current Digital Transformation Projects at DMOs: Differences Between Large and Small DMOs

- **Large DMOs (>500,000 overnight stays) demonstrate a higher level of engagement in nearly all areas of digital transformation**, particularly regarding data, new technologies, and AI.
- The gaps are particularly pronounced in projects related to data (68% vs. 47%) and new technologies (74% vs. 49%). This likely reflects significant differences in financial resources, internal expertise, and investment capacity.
- **Small DMOs (< 500,000 overnight stays) remain more focused on issues directly related to sales, digital marketing**, **and online visibility**, often adopting more pragmatic and tactical approaches.
- Large organizations appear to be gradually shifting toward more integrated approaches, combining data, automation, personalization, and AI, while smaller DMOs more often adopt a piecemeal approach to digital tools.
- Despite these differences, one observation is common to both groups: the digital transformation of DMOs is now strongly influenced by the rise of AI, data management, and the need to remain visible in digital environments increasingly dominated by platforms and conversational engines.

Current Digital Transformation Projects at DMOs: Differences Across Countries

- **Austria**: the country most focused on projects related to new technologies, AI, data, and automation. Austrian DMOs appear to be adopting more integrated approaches geared toward operational efficiency. This can also be explained by the significant presence of major destinations in the sample.
- **Canada**: Very high priority given to digital marketing, customer relations, and visitor experience. Responses place strong emphasis on CRM, personalization, and AI. However, results should be interpreted with caution due to the small sample size.
- **France**: A more varied transformation, with strong interest in GEO/SEO, generative AI, marketplaces, and support for service providers. Projects often remain fragmented and tied to the diversity of French tourism structures.
- **Switzerland**: strong focus on digital marketing, visibility, and commercialization. Swiss DMOs appear more cautious and more focused on immediate operational uses, with particular attention paid to resource constraints and data quality.

Current Digital Transformation Projects at DMOs: A Cross-Functional Analysis and Interpretation

- The differences observed between countries can largely be explained by **the structure of the samples** and the profile of the DMOs surveyed. **Larger destinations,** which **are more prevalent in Austria and to some extent in Canada**, generally have greater human, financial, and technological resources. They therefore more frequently develop **integrated approaches** combining data platforms, automation, CRM, artificial intelligence, and decision-support tools.
- Conversely, **small and medium-sized DMOs**, which are more numerous in the **French and Swiss samples**, remain more focused on **immediate challenges** related to **visibility, digital marketing, sales**, and the optimization of limited resources. Their projects often appear more pragmatic and oriented toward specific tools rather than comprehensive digital architectures.
- Despite these national differences, a common trend clearly emerges across the four countries: DMOs are gradually entering a **new phase of digital transformation marked by the rise of artificial intelligence, the growing importance of data, and the need to remain visible in digital environments dominated by platforms and conversational engines**. Digital transformation is no longer limited to online presence or social media, but now concerns destinations' ability to structure their data, automate certain processes, and adapt to new AI-driven search and booking methods.

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Future Areas of Transformation

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.



Future Areas of Transformation
(global sample, 4 countries, DMO > 500,000 overnight stays)

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.

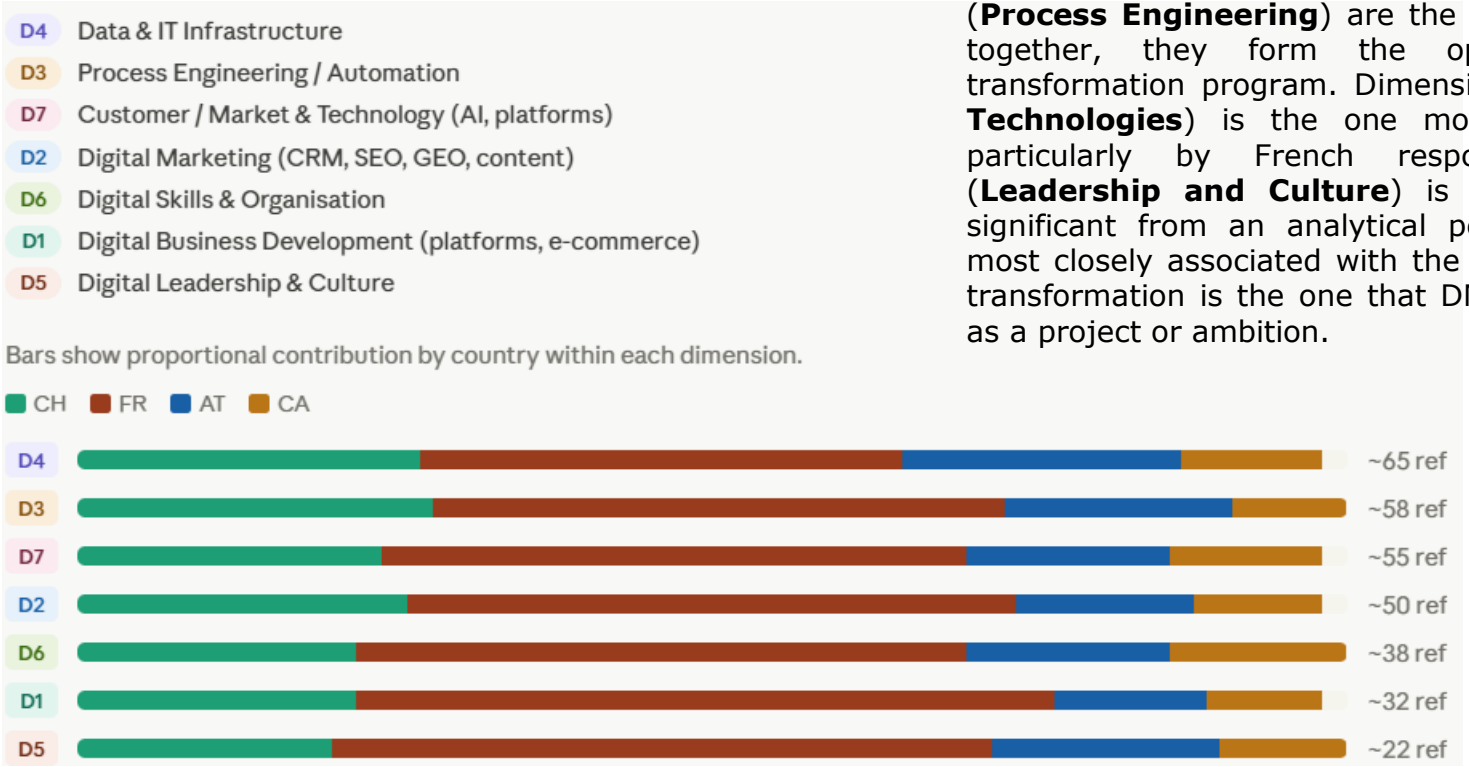


Future Areas of Transformation
(global sample, 4 countries, DMO < 500,000 overnight stays)

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.



Future Projects: Key Thematic Groups by Dimension of the "Digital Transformation Canvas" (I)



Dimensions D4 (**Data and IT Infrastructure**) and D3 (**Process Engineering**) are the two dominant dimensions; together, they form the operational core of the transformation program. Dimension D7 (**AI and Platform Technologies**) is the one most frequently highlighted, particularly by French respondents. Dimension D5 (**Leadership and Culture**) is the least cited, which is significant from an analytical perspective: the dimension most closely associated with the sustainable success of the transformation is the one that DMOs are least likely to cite as a project or ambition.

Future Projects: Key Thematic Groups by Dimension of the "Digital Transformation Canvas" (II)

Data and IT Infrastructure (D4): This is the dominant dimension across all four countries and represents one of the most evident trends emerging from the data set. DMOs frequently refer to CRM systems, structured data, data warehouses, regional data platforms, interoperability, dashboards, APIs, data analysis, data quality, and AI readiness. Typical examples include "regional data hub," "data warehouse & guest data platform," "open data," "data lake," "data structuring," and "CRM / Data / AI."The strong presence of D4 suggests that many DMOs are still in the foundational phase of digital transformation: establishing the underlying data infrastructure necessary for more advanced capabilities such as automation, personalization, AI integration, or predictive analytics. In many cases, respondents focus less on strategic innovation than on solving problems related to system fragmentation, poor data quality, low interoperability, or the lack of centralized data governance.

Digital Processes / Automation (D3): D3 is the second dominant dimension and is closely linked to operational efficiency. Many DMOs mention workflow automation, the digitization of internal processes, automated communication, ticketing, billing, process simplification, AI-assisted routine tasks, and collaborative work environments. Austria is particularly active in this area, with references to paperless operations, integrated project management, the automation of routine processes, and digital services for visitors. The prominence of the D3 dimension reveals that many tourism organizations are still in the process of modernizing operational structures that, historically, were only partially digitized. Automation is often viewed less as a radical innovation and more as a pragmatic response to limited resources, increasing complexity, and ever-higher expectations regarding responsiveness and efficiency.

Future Projects: Key Thematic Groups by Dimension of the "Digital Transformation Canvas" (III)

Customer/Market and Technology Perspective (D7): Dimension D7 reflects growing concerns related to AI. It encompasses AI assistants, chatbots, GEO/LLM visibility, conversational agents, AI-assisted customer service, dynamic websites, personalization, mobility services, AR/VR applications, and digital visitor experiences. France plays a particularly significant role in this dimension, due both to the size of the sample and the diversity of AI-related experiments. Many French DMOs already cite "GEO," "AI-compatible visibility," "AI insights," conversational AI, and AI-assisted customer relations as strategic priorities. Switzerland and Austria also mention AI visibility and the operational integration of AI, while Canada focuses more on conversational agents and AI-enhanced service quality. It is important to note that AI is rarely discussed as an isolated technological fascination. It is increasingly associated with discoverability, the quality of structured data, automation, and customer interaction, demonstrating that DMOs already perceive AI as part of a broader transformation of platforms and ecosystems.

Digital Marketing (D2): Digital marketing remains a major focus of transformation, particularly in the areas of search engine optimization (SEO), content production, marketing automation, social media visibility, personalization, and audience targeting. France is particularly active in the areas of SEO/GEO optimization, content adaptation, and visibility strategies in AI-driven environments. Switzerland also emphasizes search engine optimization (SEO), search engine advertising (SEA), newsletters, and digital content strategies. However, comments suggest that digital marketing is gradually shifting away from traditional social media communication toward algorithmic discoverability and data-driven personalization. Visibility is increasingly seen as dependent on platforms, AI systems, and recommendation engines rather than on websites or social media alone.

Future Projects: Key Thematic Groups by Dimension of the "Digital Transformation Canvas" (IV)

Digital Skills and Organization (D6): Many responses highlight the need for training, skills development, digital acculturation, onboarding of new employees, and organizational adaptation. This dimension is particularly evident in France, where many DMOs explicitly mention the concepts of "support," "training," "acculturation," and the integration of AI into daily work practices. The comments reveal that digital transformation is perceived not only as a technological issue but also as a human capital challenge. Several organizations highlight the difficulties in retaining internal expertise, supporting tourism service providers, or ensuring that teams can keep pace with technological developments.

Digital Business Development (D1): The D1 component is reflected in references to online booking, e-commerce, ticketing, marketplaces, digital products, commercial platforms, cross-selling, and monetization strategies. France is particularly active in this area, with numerous comments regarding the online sale of leisure products, commercial platforms, and revenue generation. Switzerland also mentions revenue from online stores, digital products, and booking optimization. However, compared to dimensions D3 and D4, innovation in business models remains relatively secondary. Most comments focus on optimizing existing activities rather than creating entirely new digital revenue models.

Future Projects: Key Thematic Groups by Dimension of the "Digital Transformation Canvas" (V)

Digital Leadership and Culture (D5): Dimension D5 is the least represented across the four countries, which is of significant analytical importance. References to leadership vision, governance, innovation culture, digital strategy, sovereignty, or organizational mindset remain relatively limited compared to concerns related to infrastructure and operational aspects. When it does appear, this dimension often takes the form of reflections on digital sovereignty, dependence on GAFAM, digital sobriety, preserving the human dimension, or the balance between innovation and authenticity. France stands out for its discussions around open-source ecosystems, "digital sobriety," and technological independence.

The relative absence of D5 suggests that many DMOs still approach digital transformation primarily from the perspective of tools and operational improvements rather than through an integrated strategic transformation. The dominant mode of engagement across the dataset is therefore the selection of tools rather than the construction of an architecture. Approximately 80 to 85% of substantive responses refer to individual tools or capabilities (CRM, chatbot, GEO, SEO, automation, AI) without explaining how these elements fit into a coherent transformation strategy. Only a minority of respondents describe integrated architectures in which the data infrastructure enables automation, which in turn supports personalization, customer intelligence, or new business models. These responses, however, represent the most strategically mature and forward-looking perspectives.

Future Projects: Key Country-Specific Findings

In all four countries, feedback indicates that DMOs are no longer focusing solely on digital tools but are considering a broader transformation of their organizational model. The most frequently discussed topics are data infrastructure, AI integration, digital marketing visibility, process automation, and skills development.

Switzerland presents a balanced profile, paying particular attention to structured data, customer relationship management (CRM), process automation, AI-assisted communication, booking platforms, and visitor guidance. Swiss comments often link technology to practical implementation issues: data quality, interfaces, CRM integration, booking flows, and internal efficiency.

Austria appears to be more focused on systems and infrastructure. Comments frequently refer to the consolidation of regional or federal websites, guest cards, mobility solutions, process automation, data platforms, dashboards, forecasting, data visualization, and the quality of the tourism system. This reflects a relatively integrated and operational approach to digital transformation.

Comments from **Canada** are fewer in number but strategy-focused. They emphasize chatbots, support for digital maturity, AI in visitor services, data lakes, customer intelligence, accessibility, fraud prevention, and organizational support. Canadian responses often frame digital transformation within the context of value creation, service quality, and business support.

France has the most extensive and diverse set of comments. The dominant themes are AI, GEO, CRM/GRC, e-commerce, online sales, website redesign, data analytics, automation, partner support, digital sovereignty, accessibility, and training. France appears to be very active but also fragmented: many projects are concrete and operational, but they reflect a wide range of tools, priorities, and local needs.

Strategic Implications (I)

The results suggest that the next competitive advantage for DMOs will not lie simply in adopting more digital tools, but in their **ability to connect these tools, data, people, and partners within coherent digital ecosystems**. Data quality, structured information, CRM systems, interoperability, and governance are increasingly becoming fundamental capabilities. Without them, projects related to AI, personalization, automation, and GEO visibility remain fragmented and difficult to deploy at scale.

Three findings deserve special attention.

1. The first is what might be described as **a conceptual gap regarding AI.** Artificial intelligence is mentioned in the majority of responses, but the **dominant conception of AI remains largely operational.** Most DMOs view AI as a tool for automating existing tasks, improving efficiency, supporting customer service, or generating content. Only a minority—notably certain Swiss comments on "agent-based exploitation" and several French references to GEO and LLM visibility—view AI as a force capable of reshaping business models, discoverability, and distribution logic. Since technology adoption often precedes strategic integration, the implication is significant: many DMOs risk investing in AI primarily as a productivity tool, even as the competitive landscape itself is undergoing a transformation driven by AI-powered search, conversational interfaces, and automated travel planning.

Strategic Implications (II)

2. The second major finding is **the relative absence of the "Digital Leadership and Culture" dimension** (D5) in the responses. Compared to dimensions such as "Data and IT Infrastructure" or "Process Automation," very few respondents explicitly mention leadership development, governance reform, or organizational transformation. Most DMOs describe operational tools and projects rather than broader transformation processes. This discrepancy is significant from an analytical perspective, as previous research identifies leadership and organizational culture as among the most neglected—yet most critical—dimensions of digital transformation. The responses suggest that many **DMOs still approach transformation primarily as technological modernization rather than organizational change**.
3. The third—and perhaps most original—finding is the emergence of a **discourse on digital sovereignty**, primarily in the French responses. A small but consistent group explicitly questions dependence on GAFAM platforms and mentions open-source alternatives such as Linux, Nextcloud, OpenStreetMap, or Mistral. Unlike most responses focused on operational aspects, these comments propose an alternative technological architecture and link digital transformation to broader geopolitical and governance issues.

Overall, the responses reveal a sector in transition: increasingly aware of AI, datafication, and platform dependency, but still largely focused on operational modernization rather than a fully integrated digital transformation. The most digitally mature responses are not necessarily those that mention the most tools, but those that establish coherent links between data infrastructure, automation, customer intelligence, and strategic positioning within the rapidly evolving tourism ecosystem.

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A digital transformation that is well underway, but still highly uneven

- The results show that DMOs have largely integrated digital technology into their strategic priorities. Projects today focus primarily on data, artificial intelligence, digital marketing, and process automation. However, the **transformation often remains fragmented and heavily dependent on available resources**.
- The study highlights a disconnect between strategic awareness of upcoming disruptions—particularly regarding LLMs, GEO, and AI-driven discoverability—and the organizations' actual operational maturity. Many DMOs still cite **fundamental challenges: data quality, system interoperability, skills gaps, platform dependency**, and limited human resources.
- The **differences observed between countries also reflect distinct national and structural approaches**. Austrian DMOs appear more advanced in terms of system integration and digital infrastructure. French DMOs stand out for their strong operational momentum around GEO, AI, and digital marketing. Canada adopts a more strategic and conceptual approach centered on the added value of DMOs within the digital ecosystem. Switzerland combines operational concerns with institutional challenges related to data, interfaces, and stakeholder coordination.
- Finally, the results show that digital transformation now goes far beyond the simple question of tools. **Future challenges primarily concern the ability of DMOs to become orchestrators of digital ecosystems capable of connecting data, partners, content, AI, and the customer experience.**

Toward a New Generation of DMOs Driven by Data and AI

This study confirms that digital transformation has become a central issue for the competitiveness and future relevance of DMOs. Tourism organizations are gradually evolving from a promotion-focused role toward more complex functions involving coordination, data integration, marketing, and the management of digital ecosystems.

Three key insights emerge:

1) **Digital visibility is entering a new phase dominated by generative AI**, LLMs, and conversational engines. Traditional SEO is no longer sufficient; the ability to be detected and recommended by AI systems is becoming strategic.
2) **Data infrastructure and interoperability are becoming critical assets**. Structured data, APIs, CRMs, and integrated platforms now determine visibility as much as the capacity for automation and personalization.
3) **The main challenge is no longer technological, but organizational**. Skills, governance, strategic prioritization, and the ability to support local partners are emerging as the true limiting factors of transformation.

Ultimately, the results suggest that DMOs are entering a phase of more systemic transformation: organizations capable of aligning technology, data, skills, and strategy will be best positioned in tomorrow's tourism ecosystem.

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Resilient Tourism Flagship

Flagship supported by

Schweizerische Eidgenossenschaft
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RESILIENT TOURISM

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

HSLU Hochschule Luzern

University of St.Gallen

Hes·so VALAIS WALLIS

icare RESEARCH

EHL

FH GR Fachhochschule Graubünden University of Applied Sciences

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

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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)?

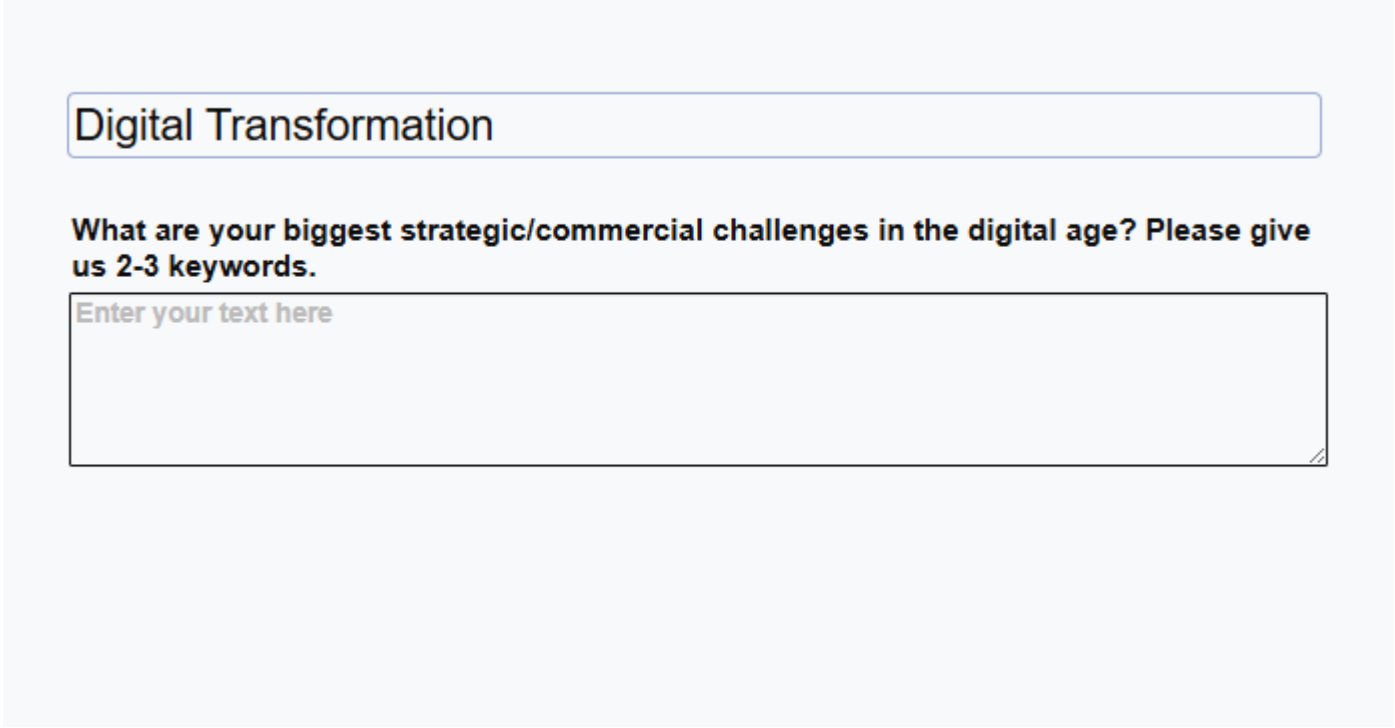
_____ %

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	○	○	○

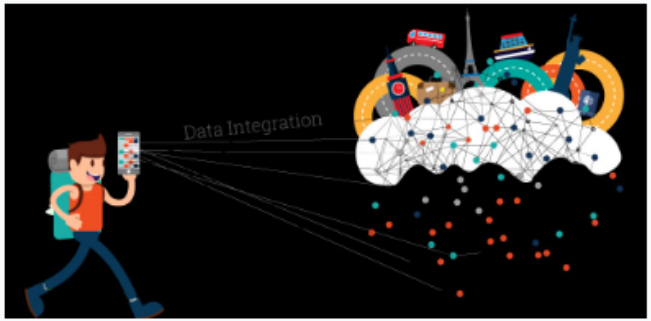
Questionnaire

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

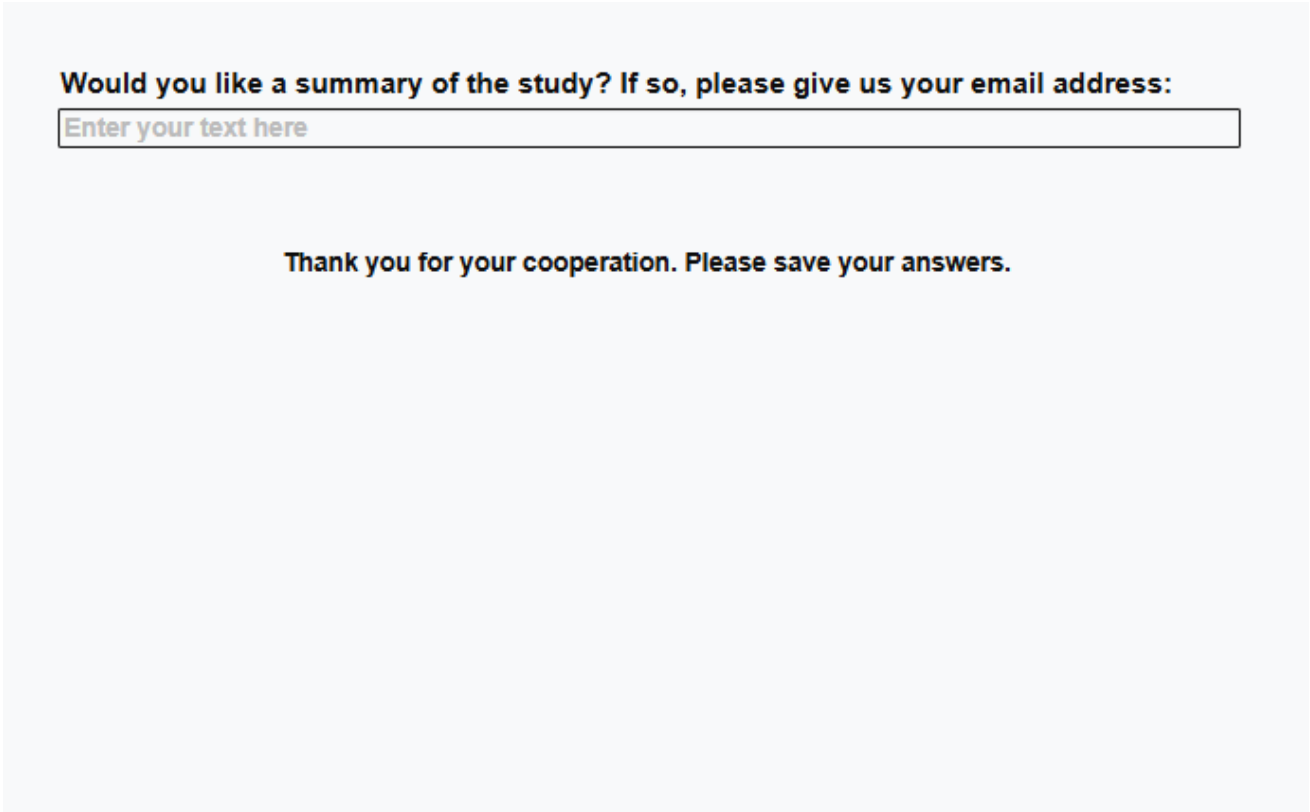
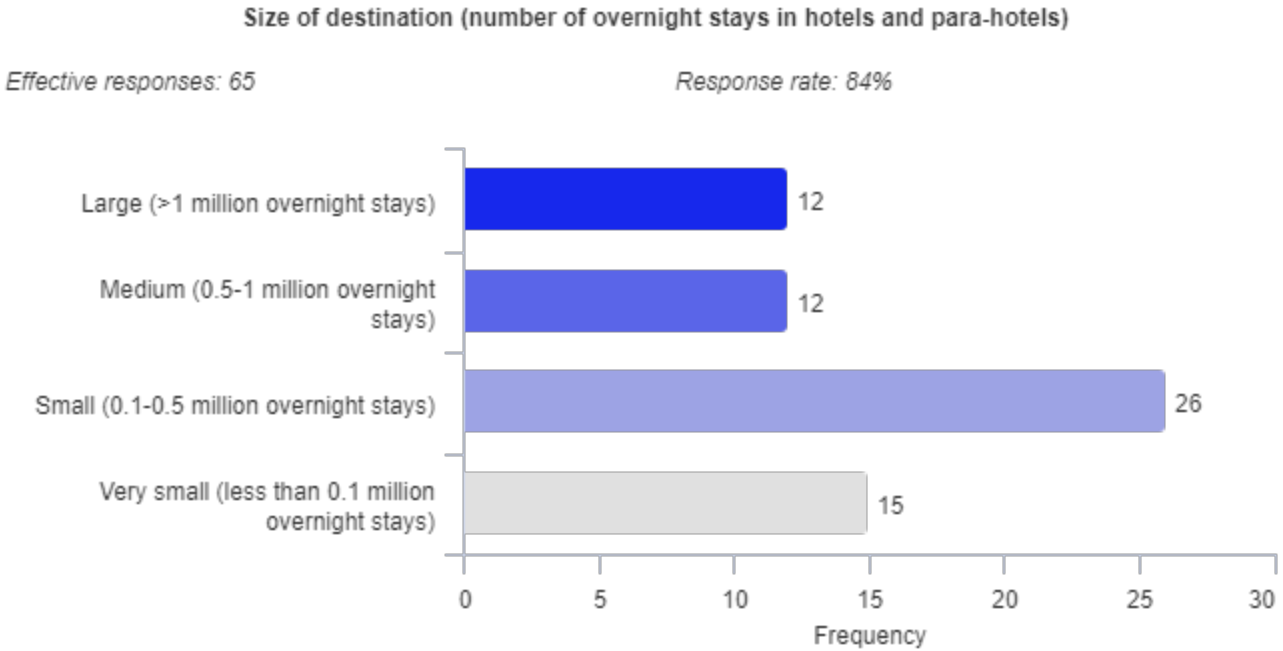


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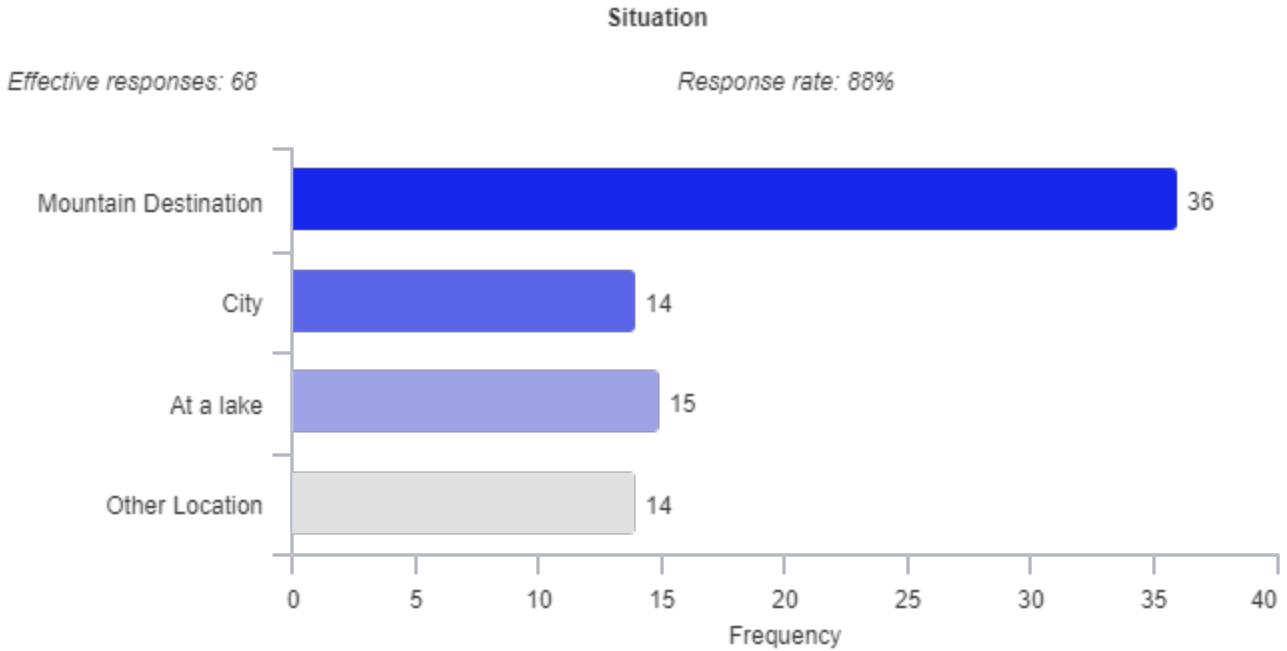
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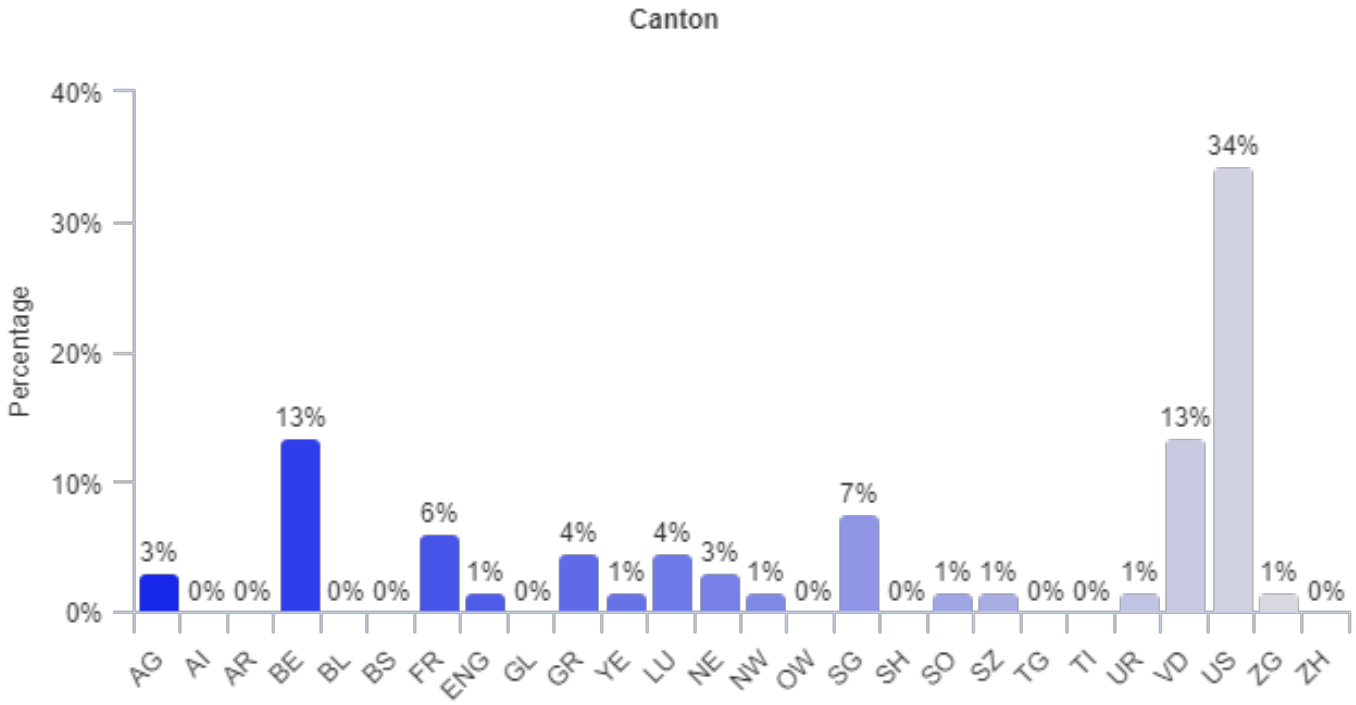
Swiss Sample: DMO Size



Swiss Sample: DMO Situation

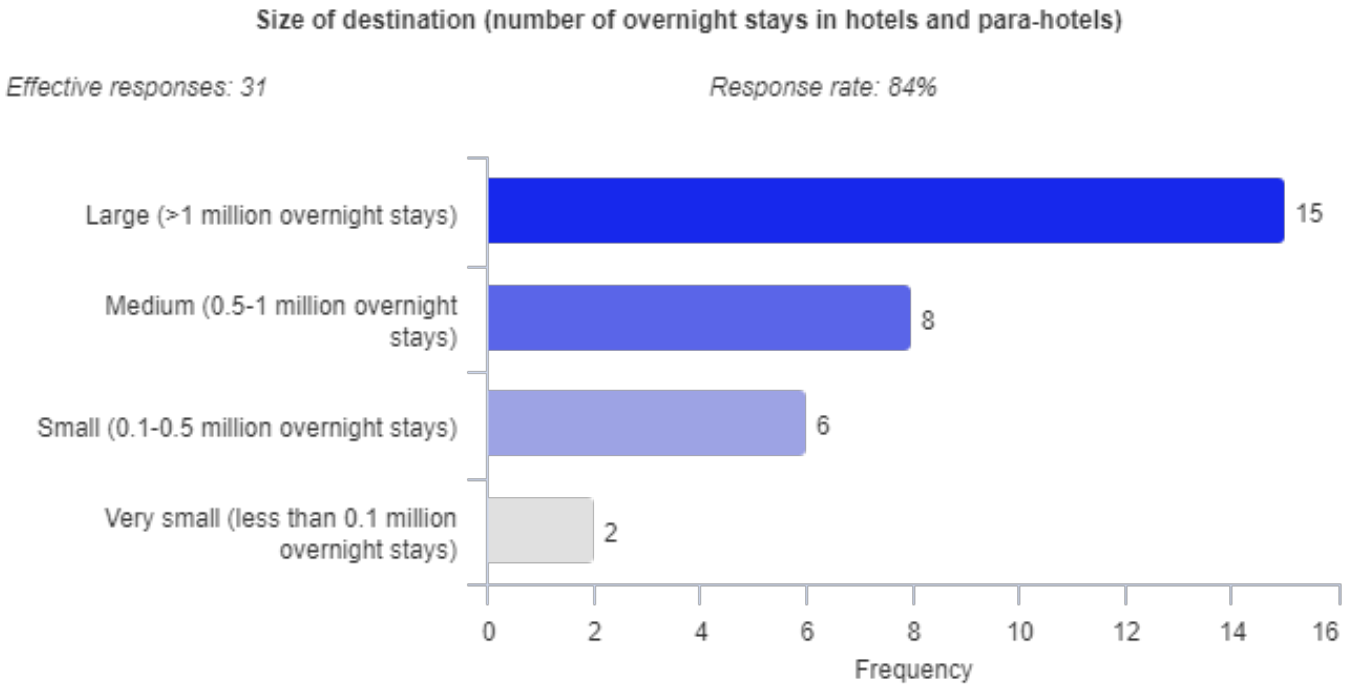


Swiss Sample: Cantons

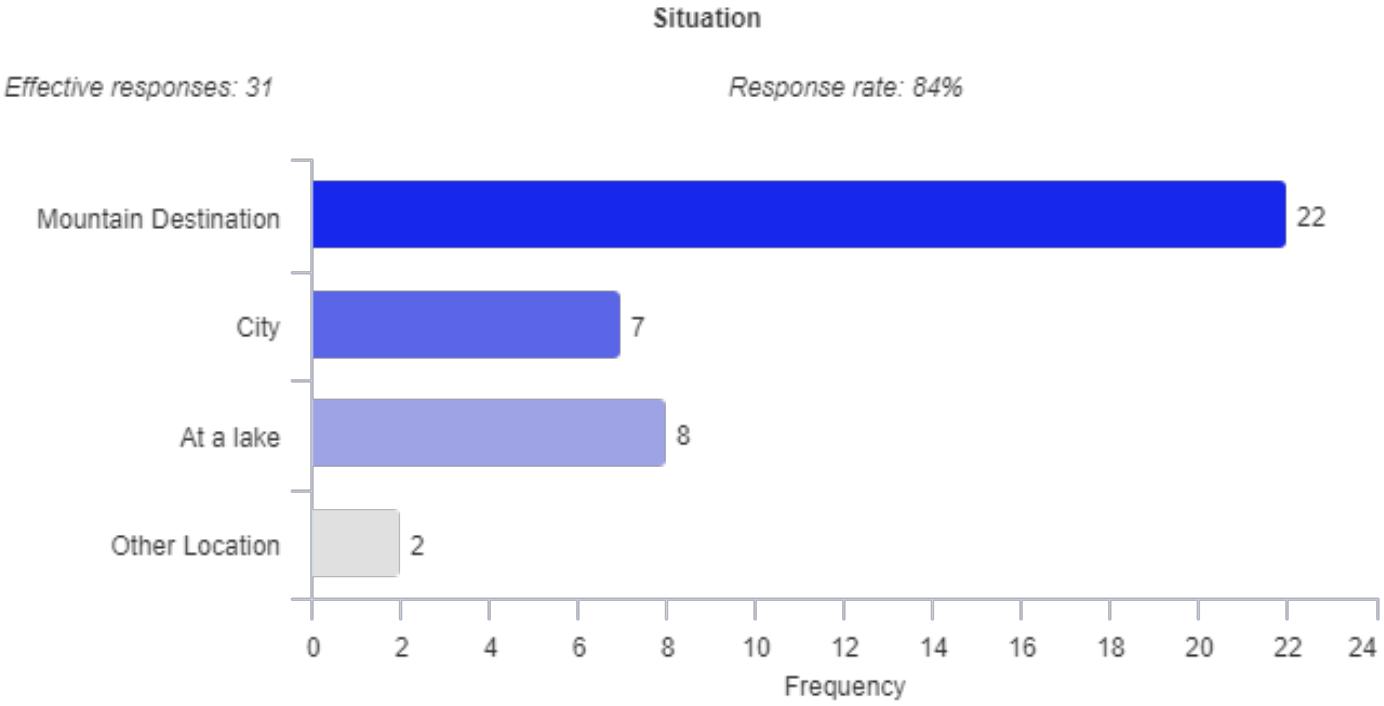




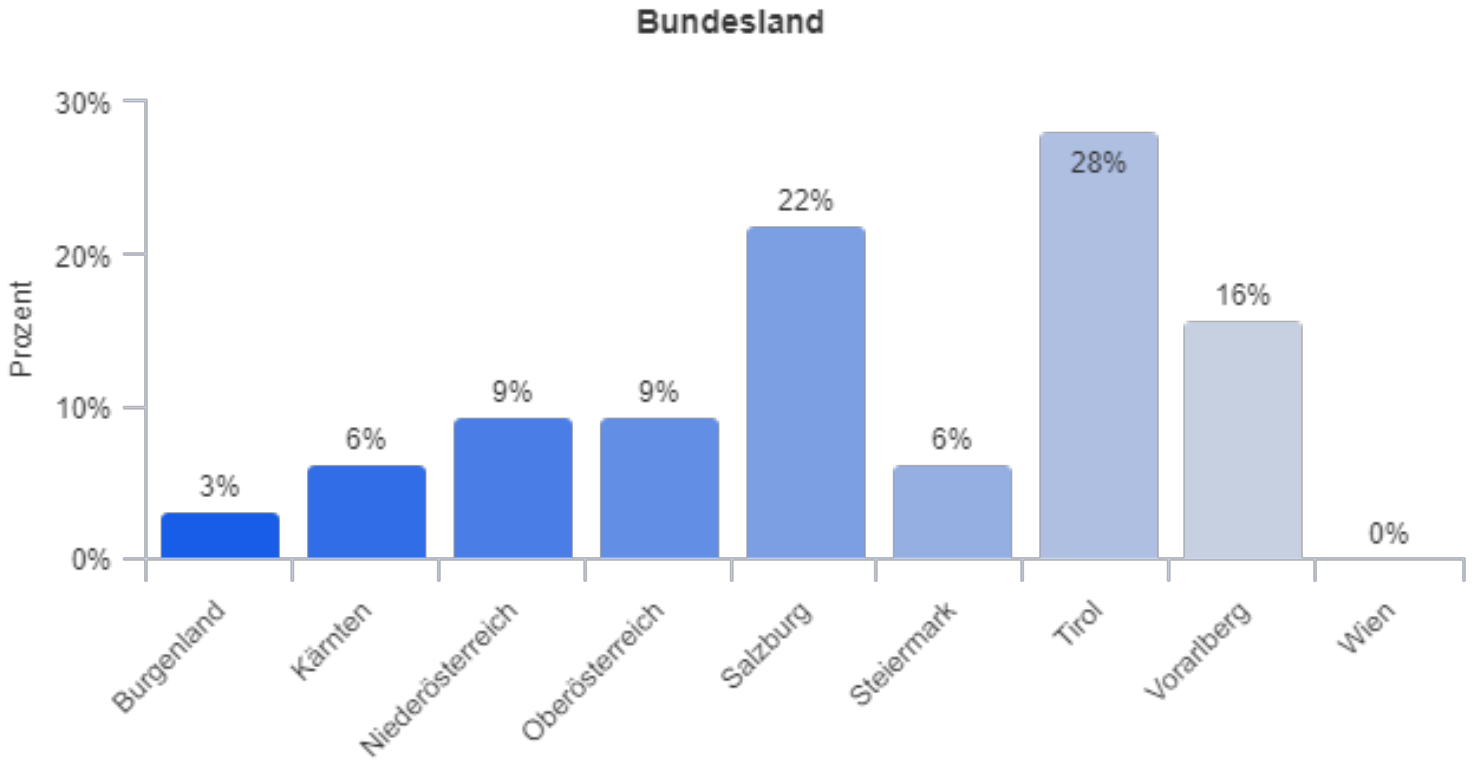
Austrian Sample: DMO Size



Case Study: Austria – DMO Situation

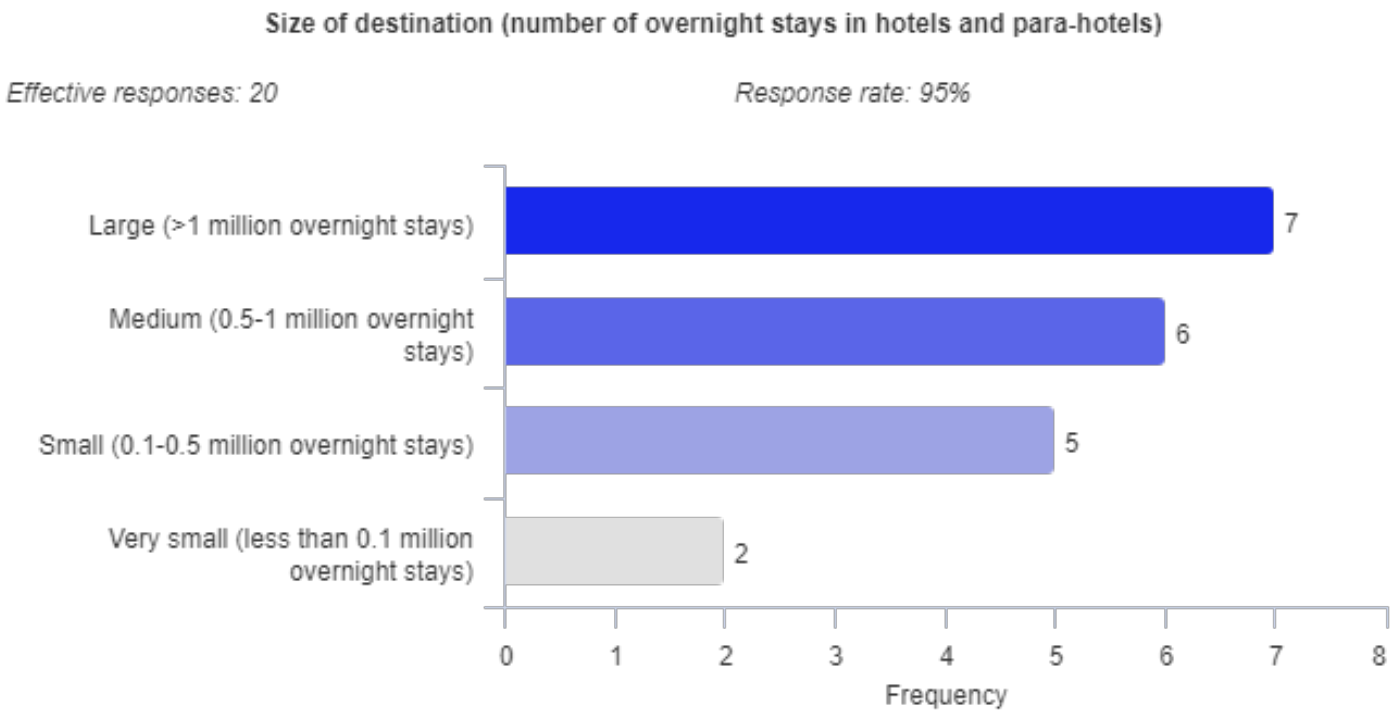


Sample Austria: Regions

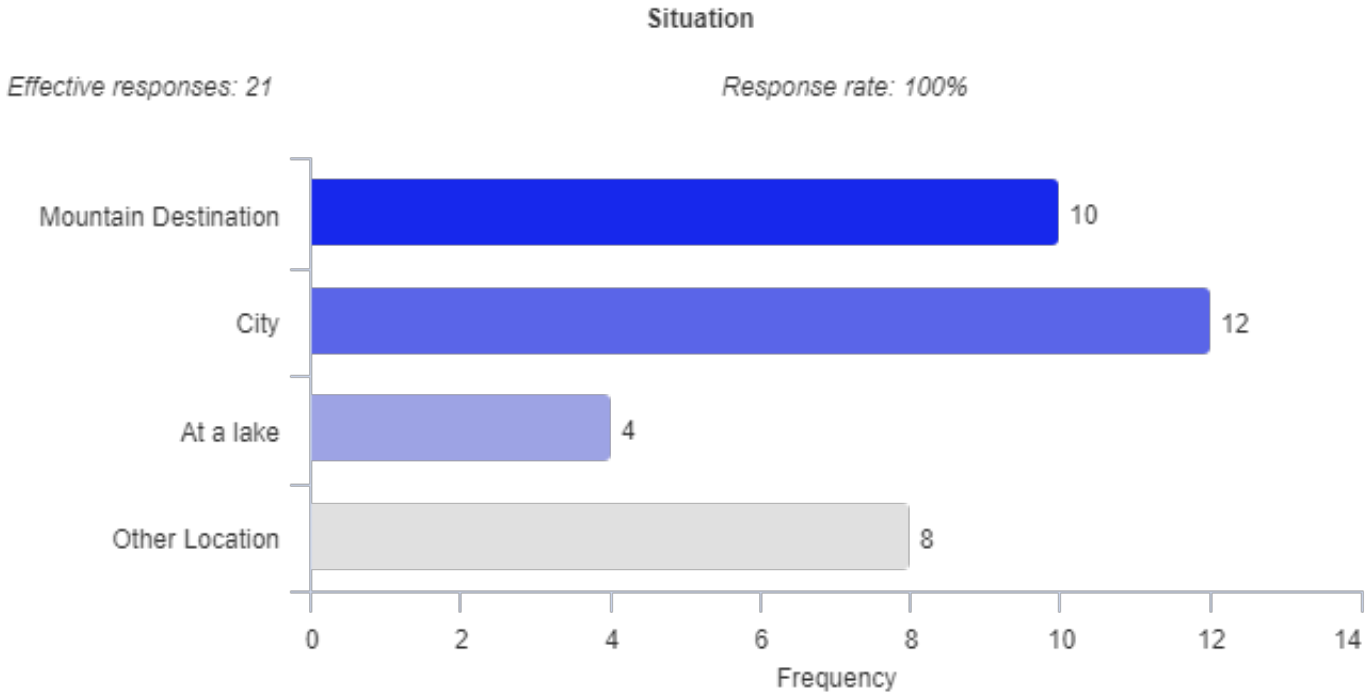




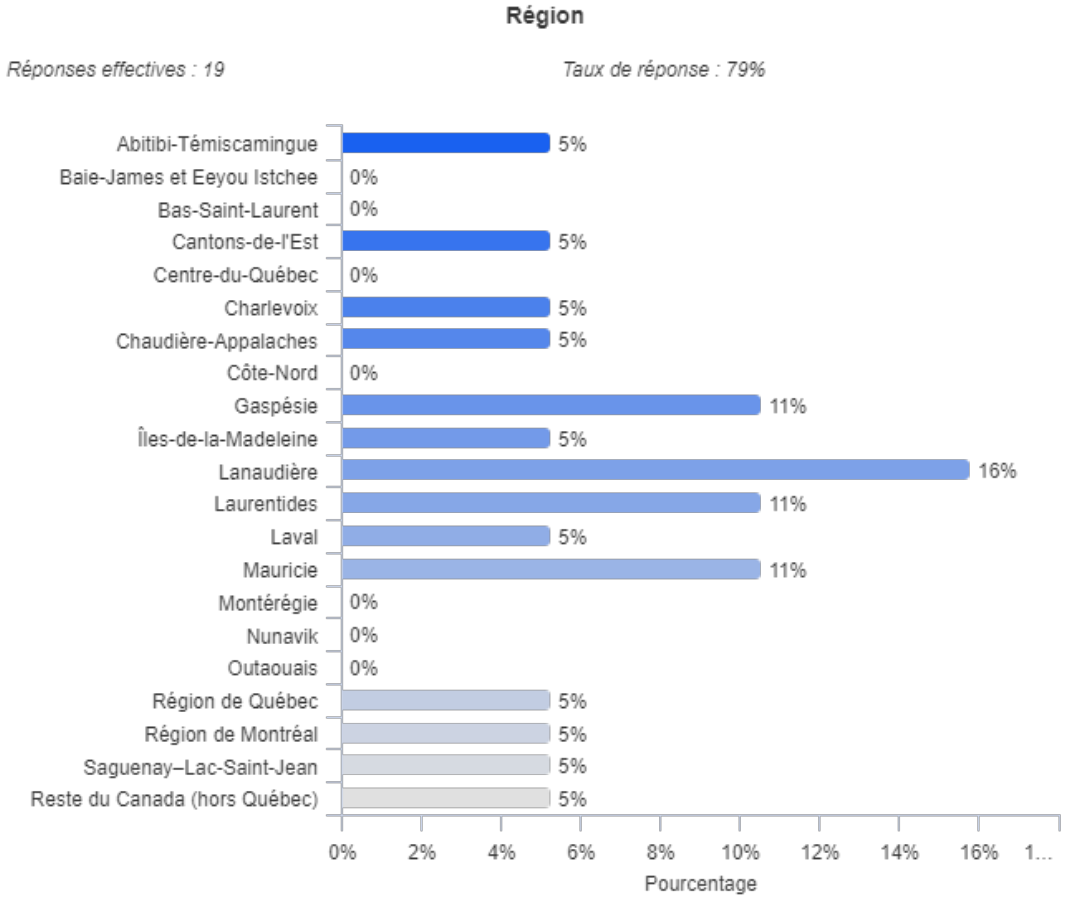
Canada Sample: DMO Size



Canada Sample: DMO Situation

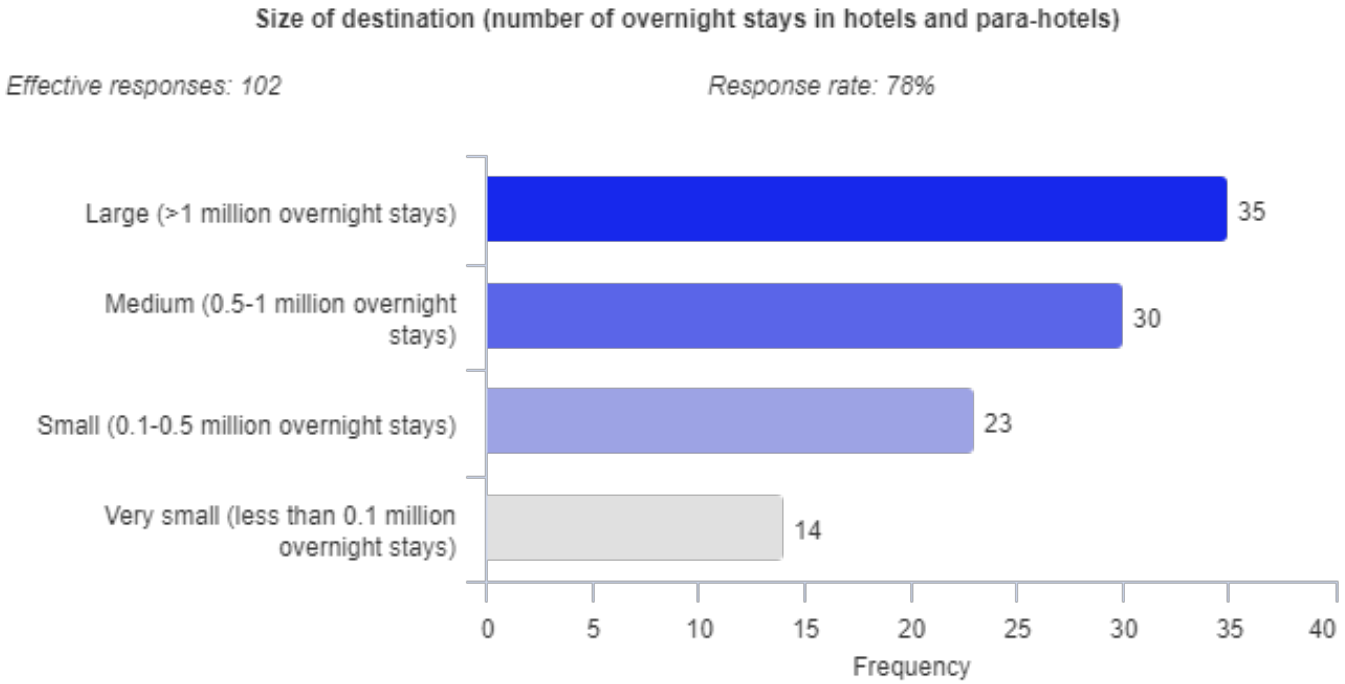


Sample Canada: Regions

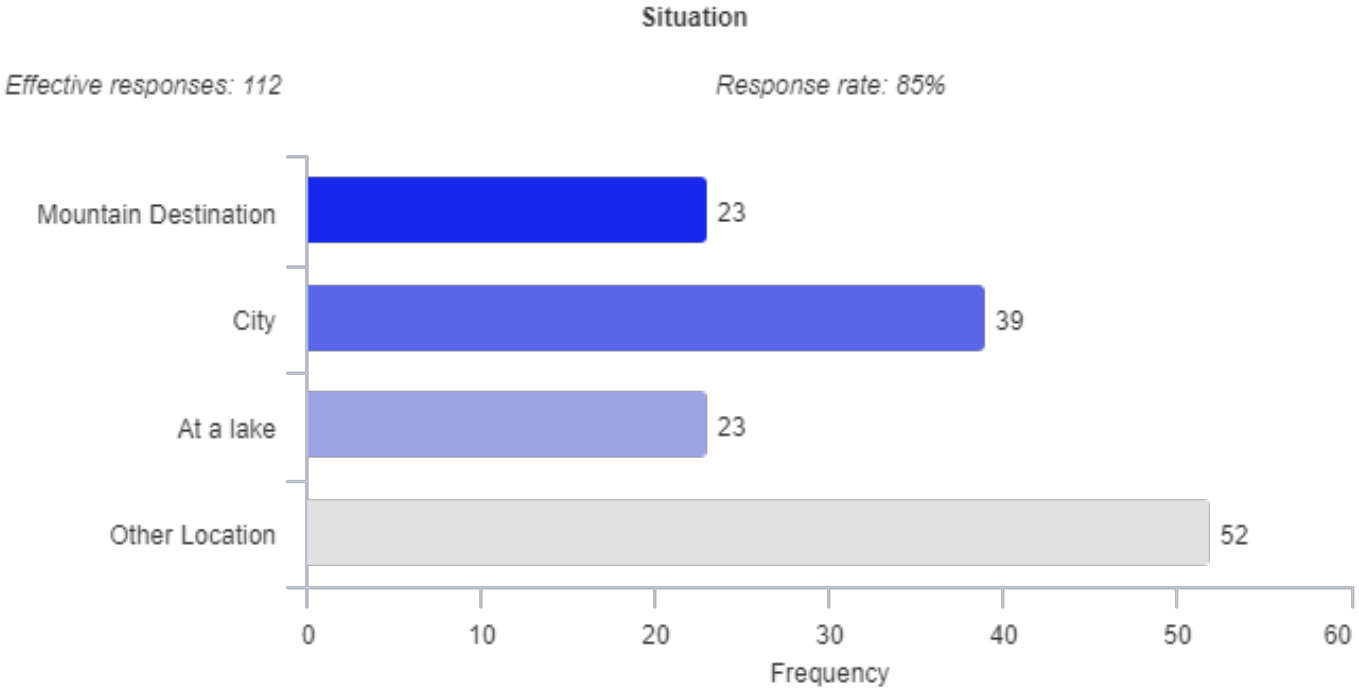




France Sample: DMO Size



France Sample: DMO Situation



Sample France: Regions

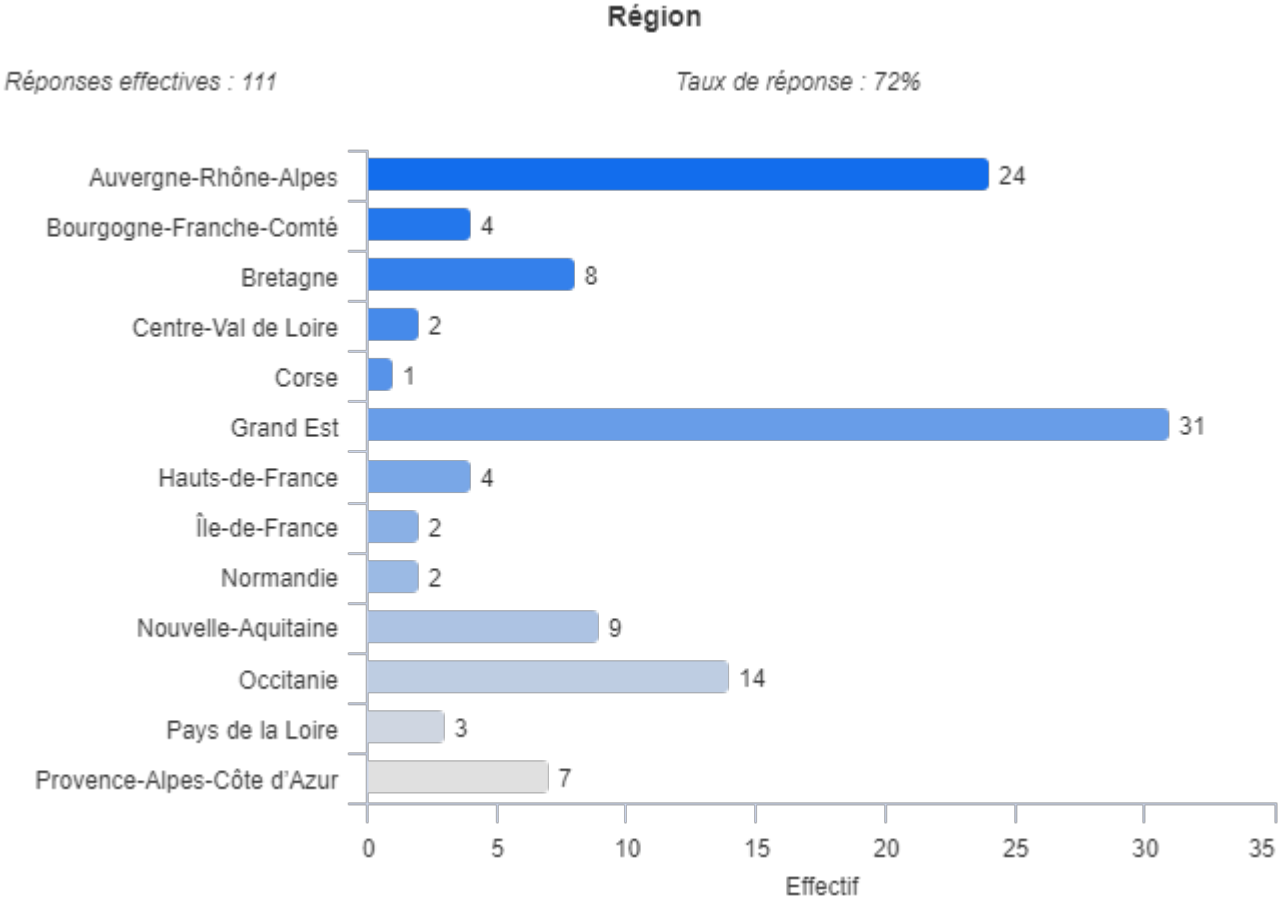
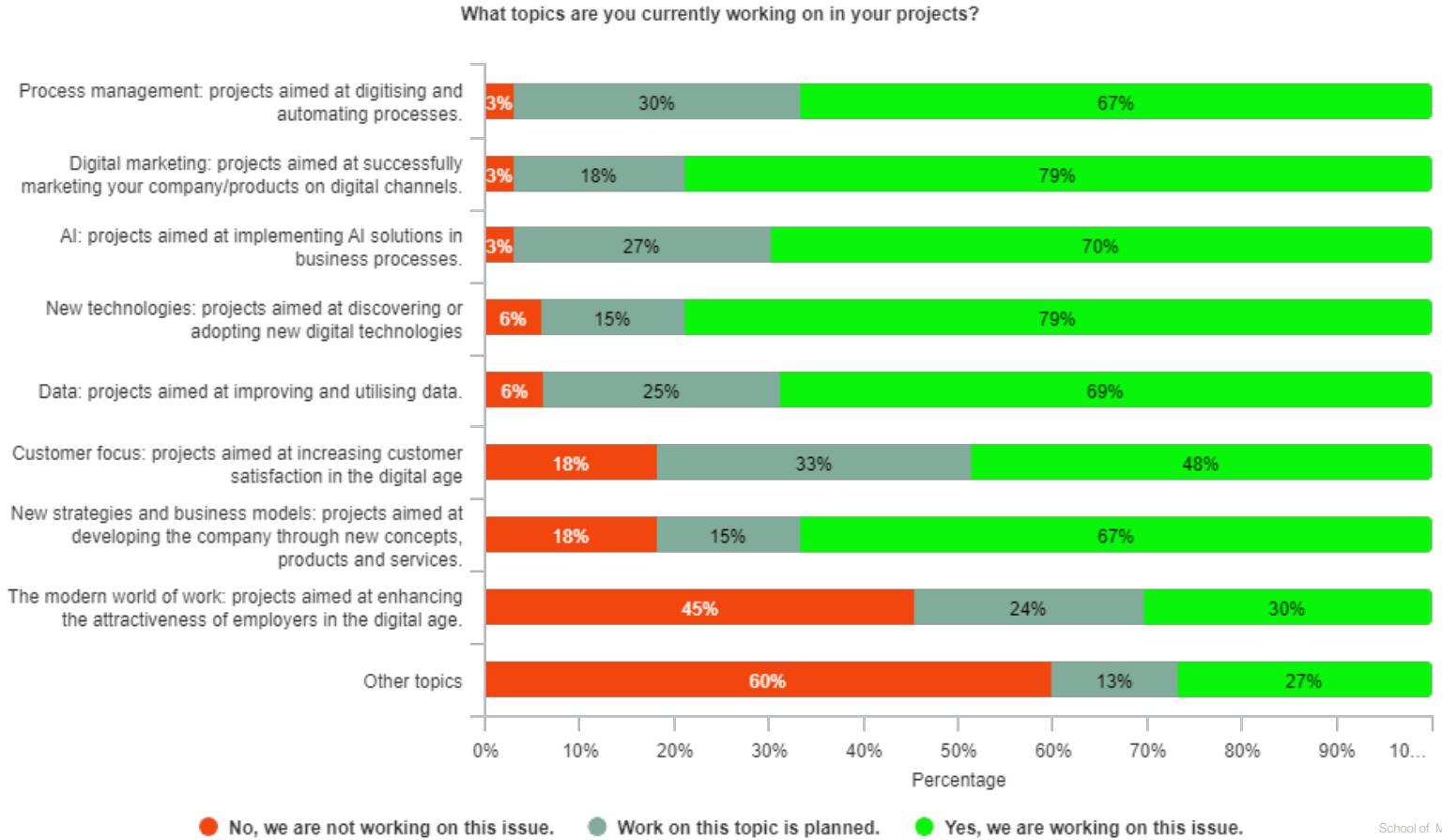


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Austria: Current Digital Transformation Projects



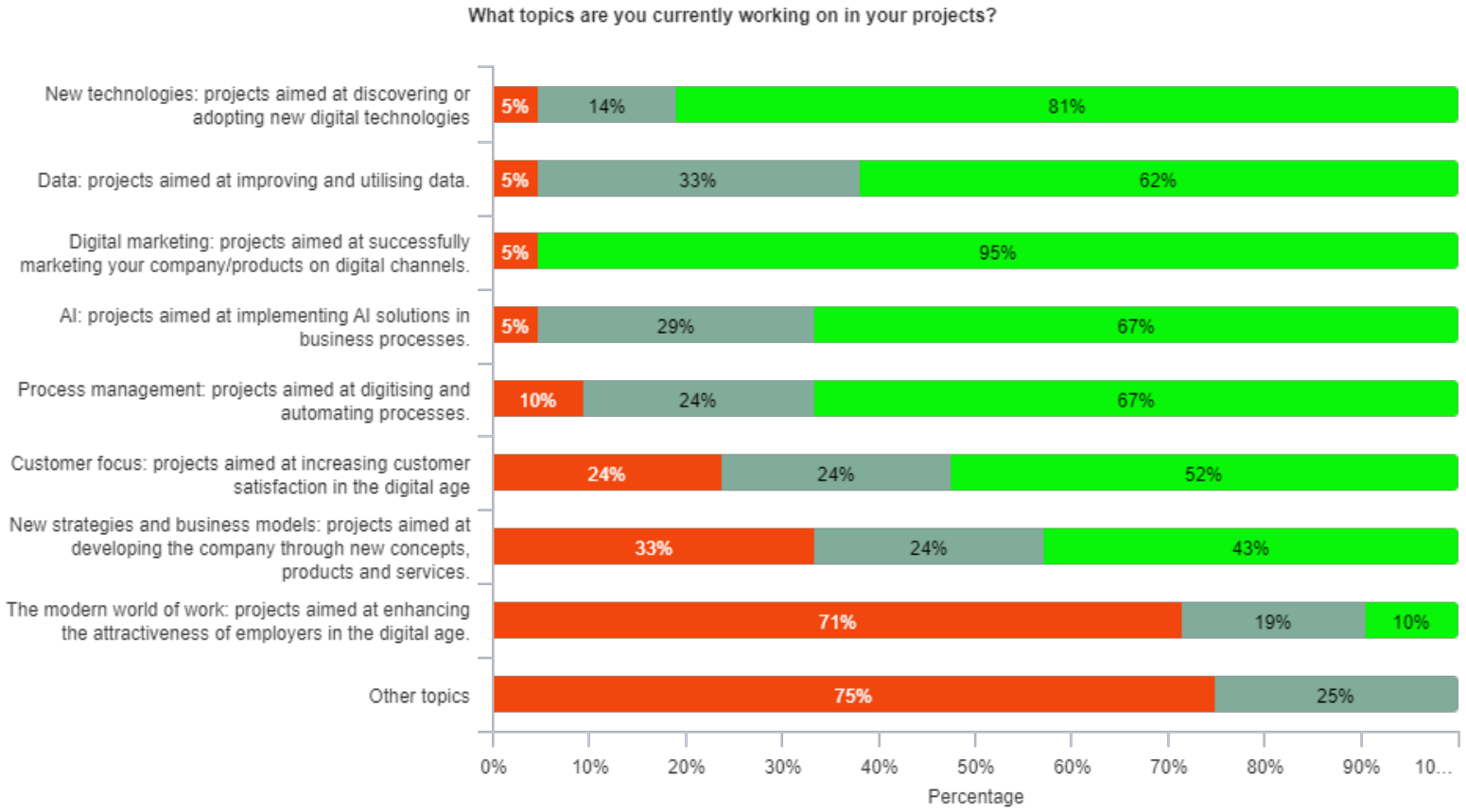


Canada: Strategic and Business Challenges in the Digital Age

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



Canada: Current Digital Transformation Projects



Canada: Future Priorities for Digital Transformation

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.



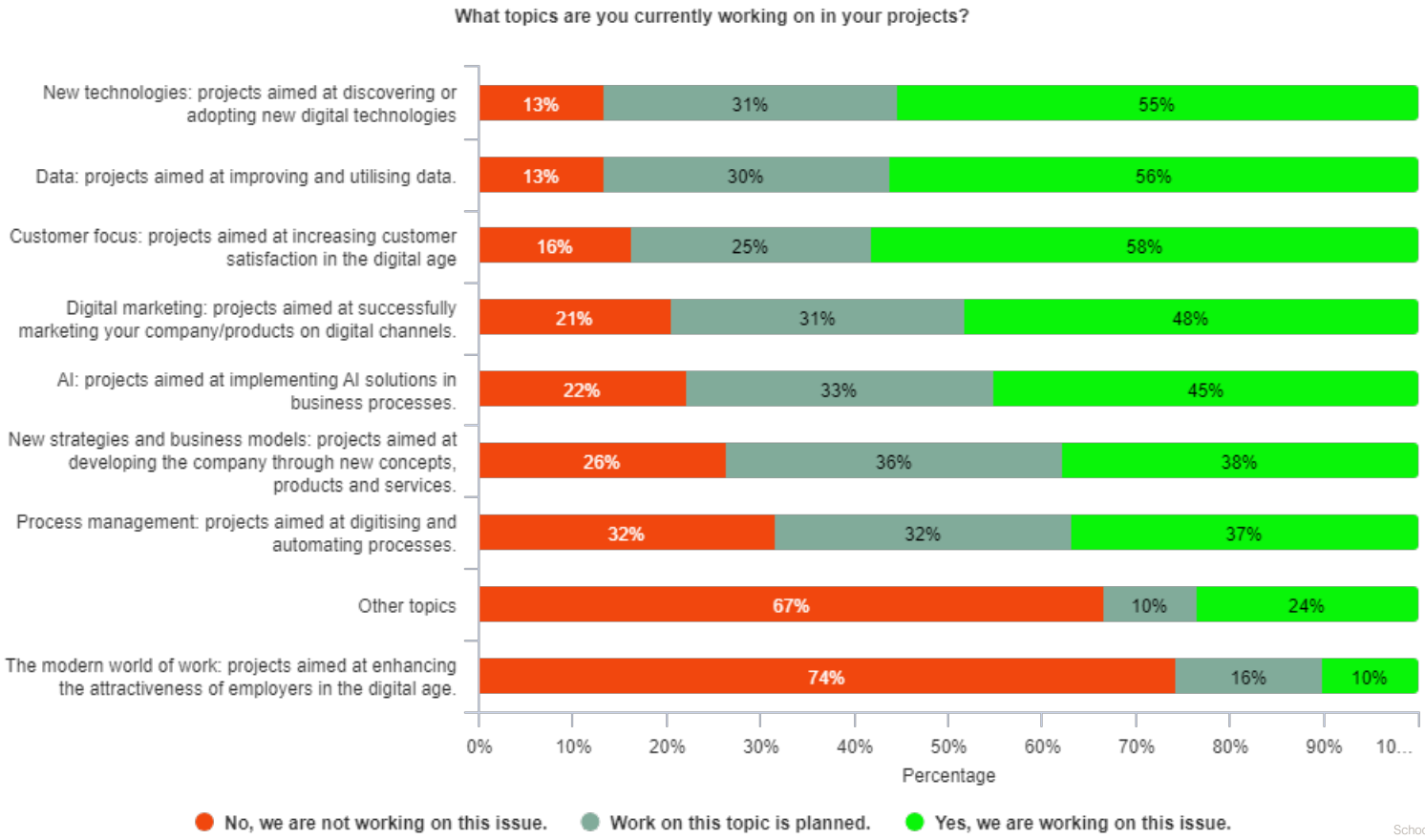


France: Strategic and Business Challenges in the Digital Age

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



France: Current Digital Transformation Projects



France: Future Priorities for Digital Transformation

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.

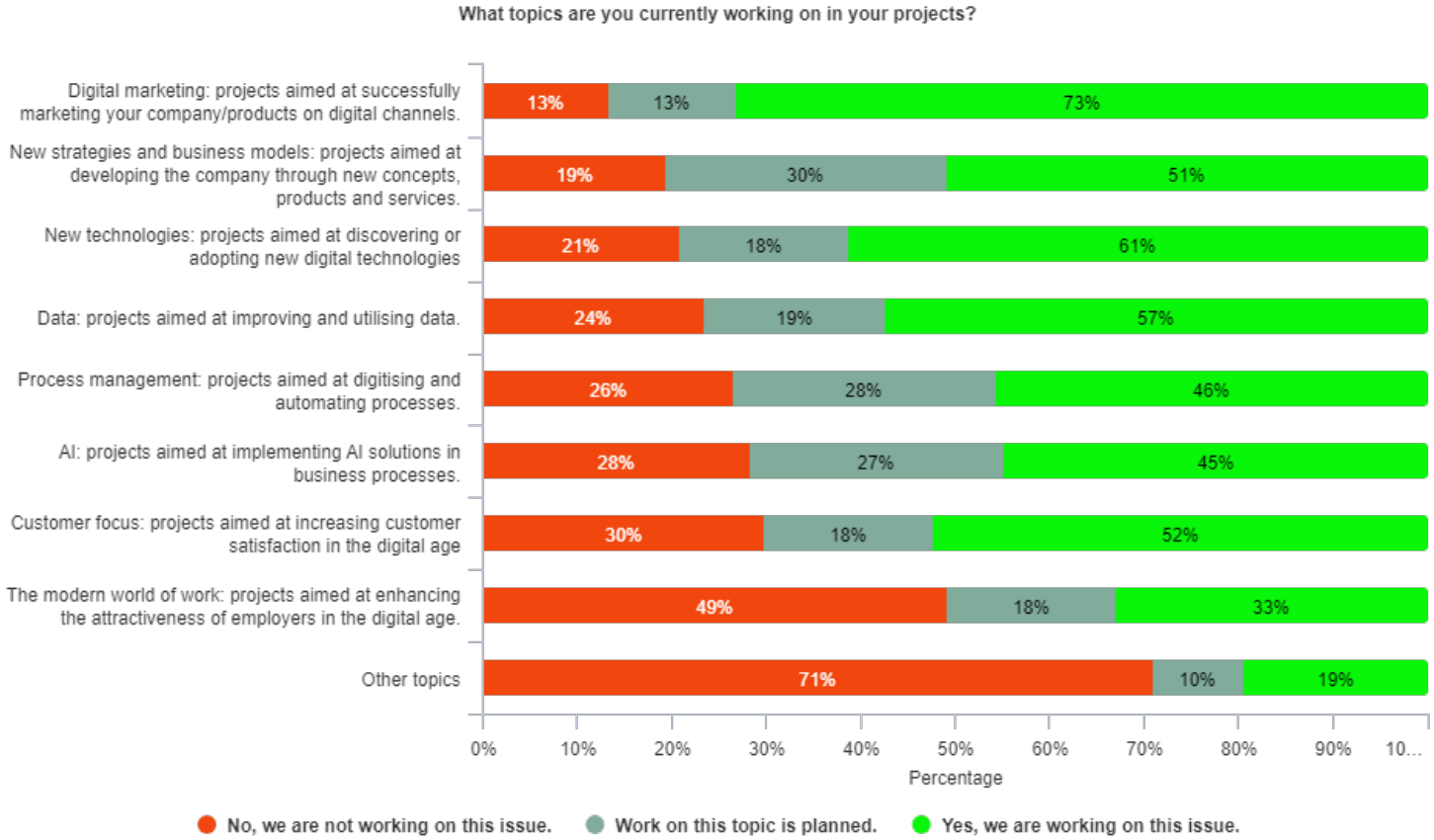




Switzerland: Strategic and Business Challenges in the Digital Age



Switzerland: Current Digital Transformation Projects



Switzerland: Future Priorities for Digital Transformation

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.

