Digital Transformation of Tourism Organizations by 2025

International Series of Surveys on DMOs (4 reports)

Report 4

The Adoption and Use of AI by DMOs

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

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April 2026

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Executive Summary (1)

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 last 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)

The results show that **artificial intelligence is now widely used in destination management organizations** (DMOs). A majority of organizations already use AI tools and believe that this technology will have a significant impact on their operations in the coming years. Adoption is particularly advanced in Austria, Canada, and Switzerland, while France shows a more moderate level of maturity.

However, **current AI usage remains heavily concentrated on the most accessible applications**. Text content generation using large language models (LLMs), translation tools, and image generation are now the dominant applications. These technologies are primarily used to support communication, marketing, and content production activities. More advanced applications, such as process automation, forecasting, service personalization, customer profiling, and revenue optimization, remain relatively underdeveloped.

The **main perceived benefits include time savings, improved operational efficiency, optimized marketing activities, and better data utilization**. Respondents also believe that AI can help improve the visitor experience and support decision-making. The use cases deemed most promising relate to marketing, customer relationship management, personalization of experiences, and optimization of internal processes.

Executive Summary (3)

Despite this strong interest, **several obstacles** continue to **hinder more widespread adoption**. The main challenges identified are a **lack of knowledge about available solutions, difficulties integrating AI into existing processes, a shortage of internal expertise, concerns regarding data protection**, and questions about the environmental impact of AI. Qualitative feedback also shows that many organizations are seeking more support, training, and best practices to transform current experiments into sustainable practices.

Finally, the study highlights the emergence of a new **strategic challenge**: the **visibility of destinations in environments powered by generative AI.** Many DMOs have already initiated or are considering actions aimed at improving their discoverability in conversational search engines and AI assistants, notably through content improvement, data structuring, team training, and the optimization of their digital presence. This trend suggests that AI is no longer merely a productivity tool but is gradually becoming a key factor in competitiveness, visibility, and the governance of tourism data.

Overall, the results indicate that DMOs are currently in a transitional phase: adoption of these tools is progressing rapidly, but **the strategic integration of AI into processes, data, and organizational models still has a long way to go**.

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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

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

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

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

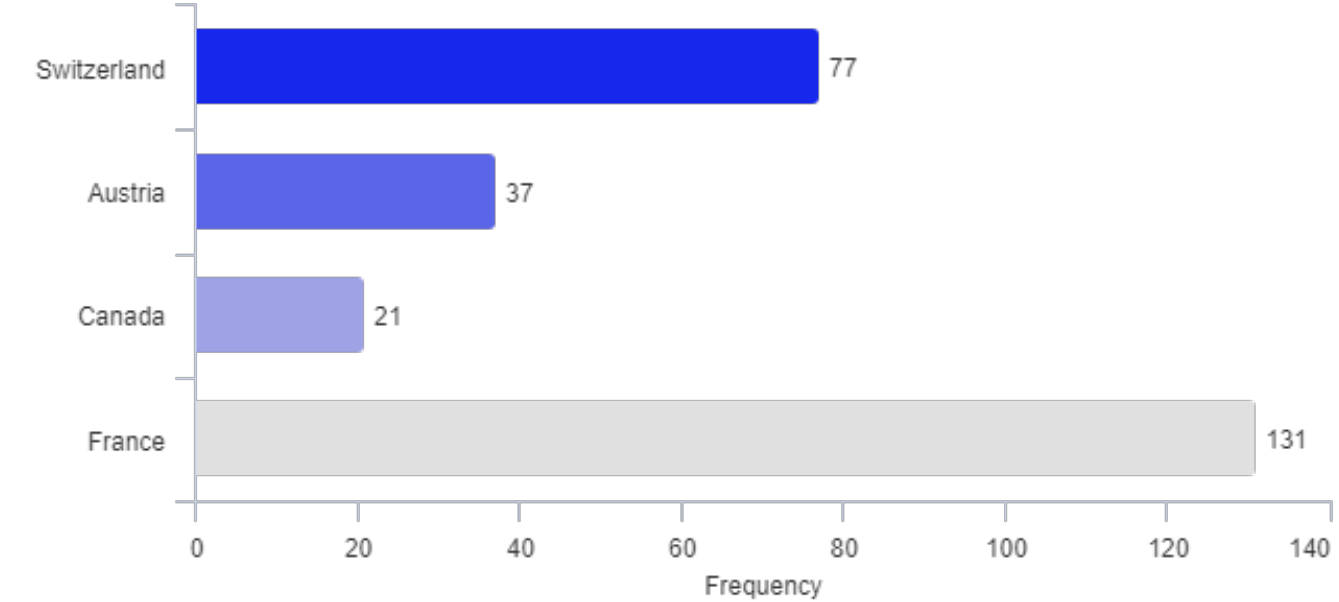
Furthermore, certain comparative analyses are influenced by the composition of the national samples, particularly in terms of the size and type of DMOs.

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

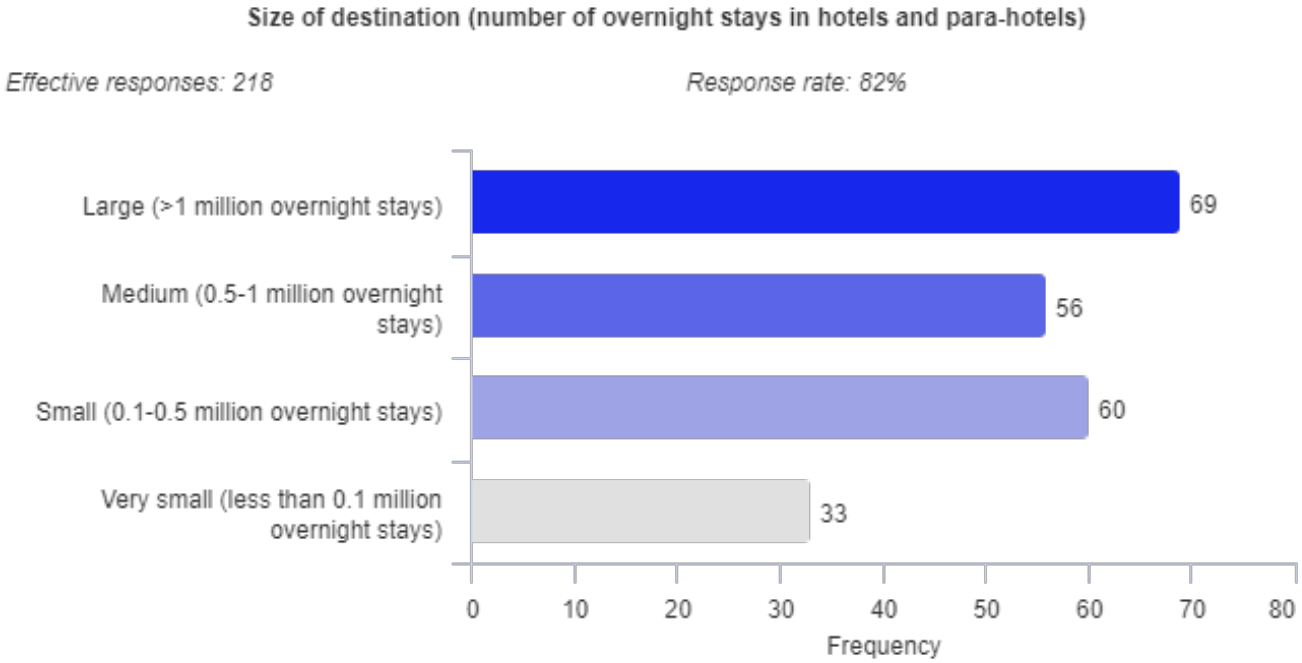
Sample: Country

Effective responses: 266

Response rate: 100%



Sample: DMO size



Sample: DMO Situation

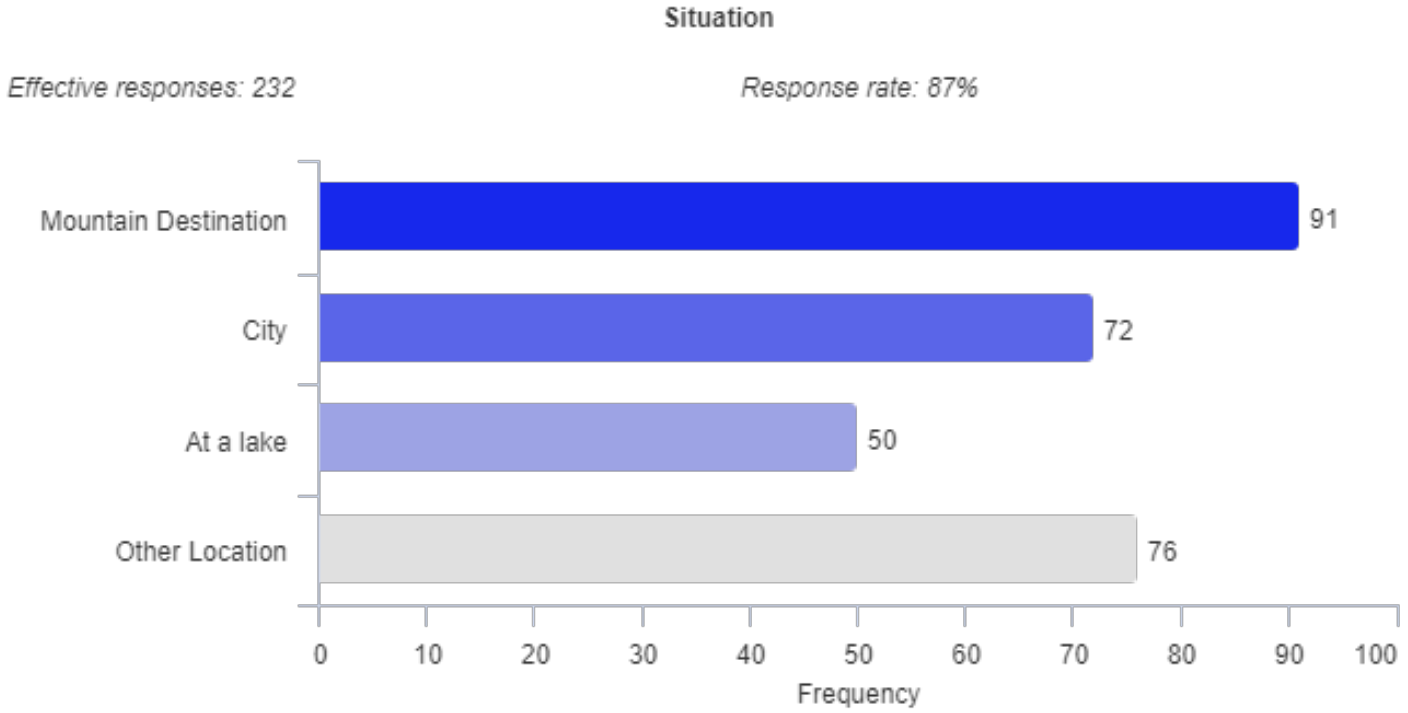
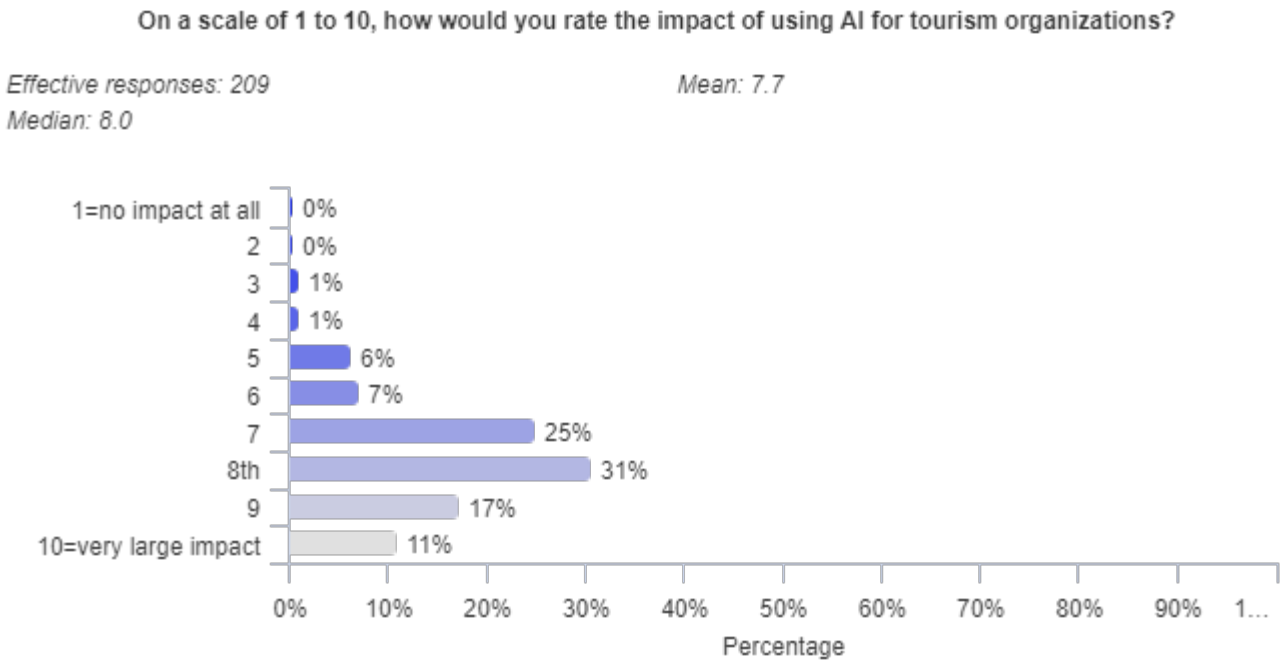


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Perceptions of the Impact of Artificial Intelligence
(overall sample, 4 countries)

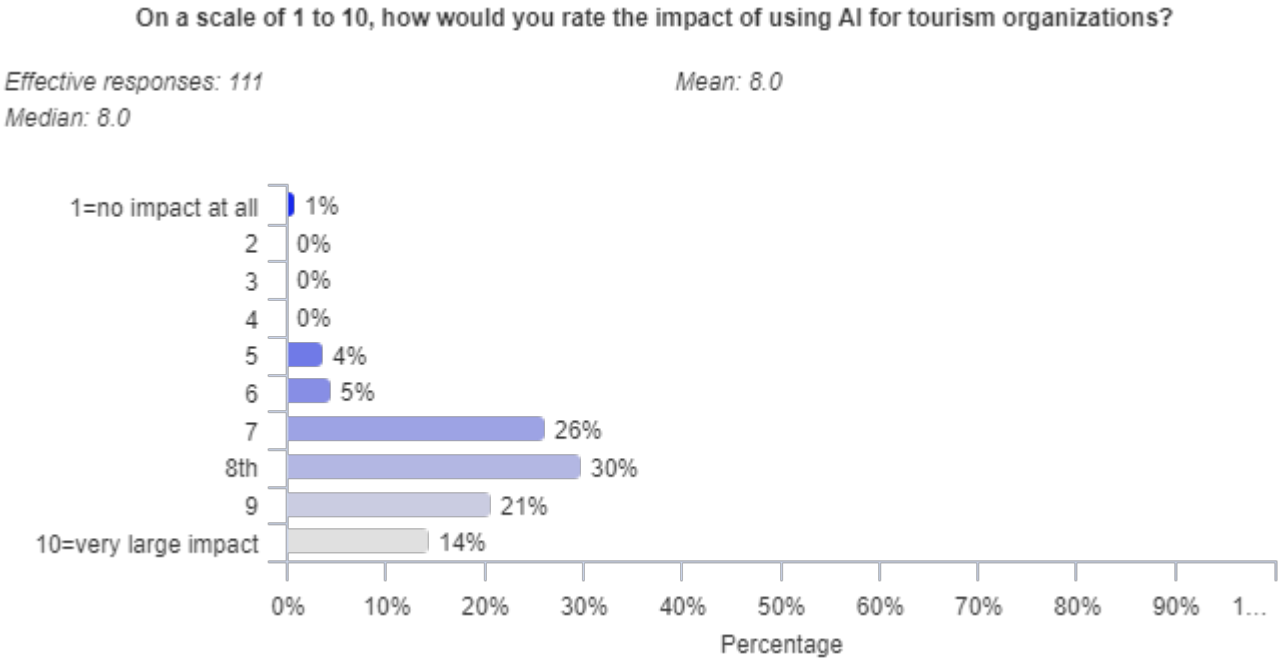


Perception of the impact of artificial intelligence is very high among DMOs in the four countries studied, with an average of 7.7 out of 10 and a median of 8. The majority of respondents rate the impact of AI between 7 and 10, indicating that tourism organizations now view this technology as a major driver of transformation for the sector.

The few responses assigned to the lower end of the scale also indicate that there is now a broad consensus on the strategic importance of AI, both for marketing and operational activities and for data analysis, personalization, and the digital visibility of destinations.

Perceptions of the Impact of Artificial Intelligence

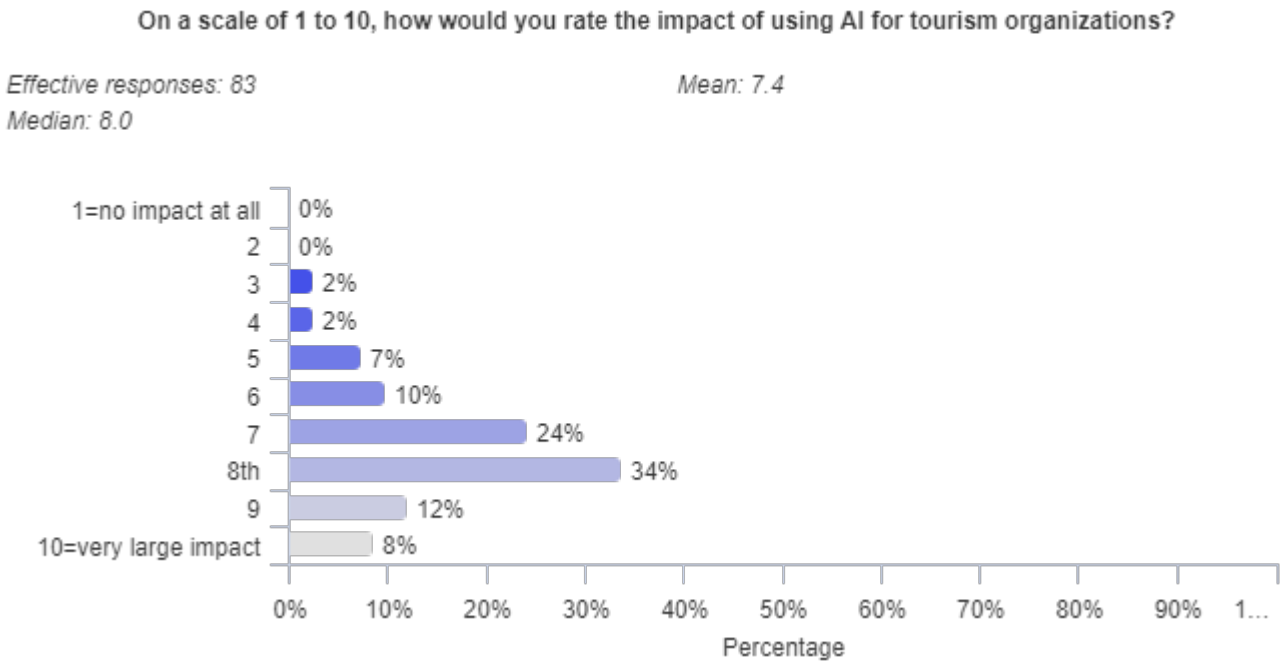
(global sample, 4 countries, DMO > 500,000 overnight stays)



Large DMOs (>500,000 overnight stays) perceive an even stronger impact of artificial intelligence, with an average score of 8.0 out of 10. Ratings are concentrated mainly between 7 and 10, reflecting a strong awareness of the strategic transformations linked to AI in the most structured destinations, which generally have more resources and data at their disposal.

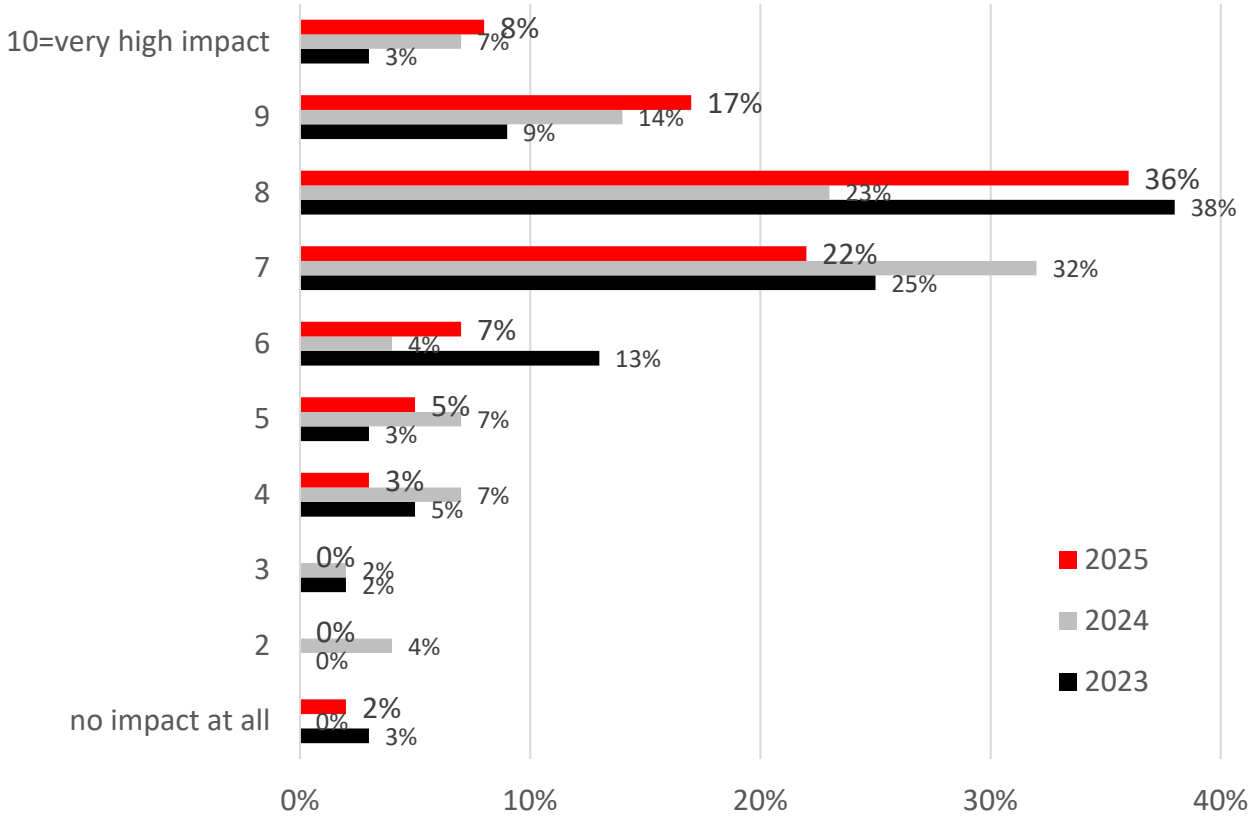
Perceptions of the Impact of Artificial Intelligence

(overall sample, 4 countries, DMO < 500,000 overnight stays)



Smaller DMOs (<500,000 overnight stays) also attribute a high impact to AI, with an average of 7.4 out of 10, though their assessments are slightly more moderate. This suggests that, although AI is perceived as a major challenge by all tourism organizations, major destinations currently appear to be more committed to this transformation and more aware of its operational and strategic implications.

Changes in the Perception of the Impact of Artificial Intelligence in Swiss DMOs Between 2023 and 2025



Perceptions of the impact of artificial intelligence in Swiss DMOs have strengthened significantly between 2023 and 2025. High ratings (scores of 8 to 10) increased significantly, while low or moderate perceptions gradually declined. In 2025, more than 60% of respondents gave a score of 8 or higher, indicating that AI is now perceived as a major strategic issue for tourism organizations.

This trend also reflects a phase of growing maturity: while perceptions were more varied in 2023, DMOs are now increasingly converging toward a shared vision of AI as a key driver of transformation.

Perceptions of the Impact of AI: Strong Convergence Despite Different National Contexts

Perceptions of the impact of artificial intelligence are high across all countries studied, with averages ranging from 7.5 to 8.1 out of 10. Responses are concentrated primarily between scores of 7 and 9, while low ratings remain marginal. These results show that DMOs now view AI as a major strategic issue for marketing, data analysis, automation, and digital visibility.

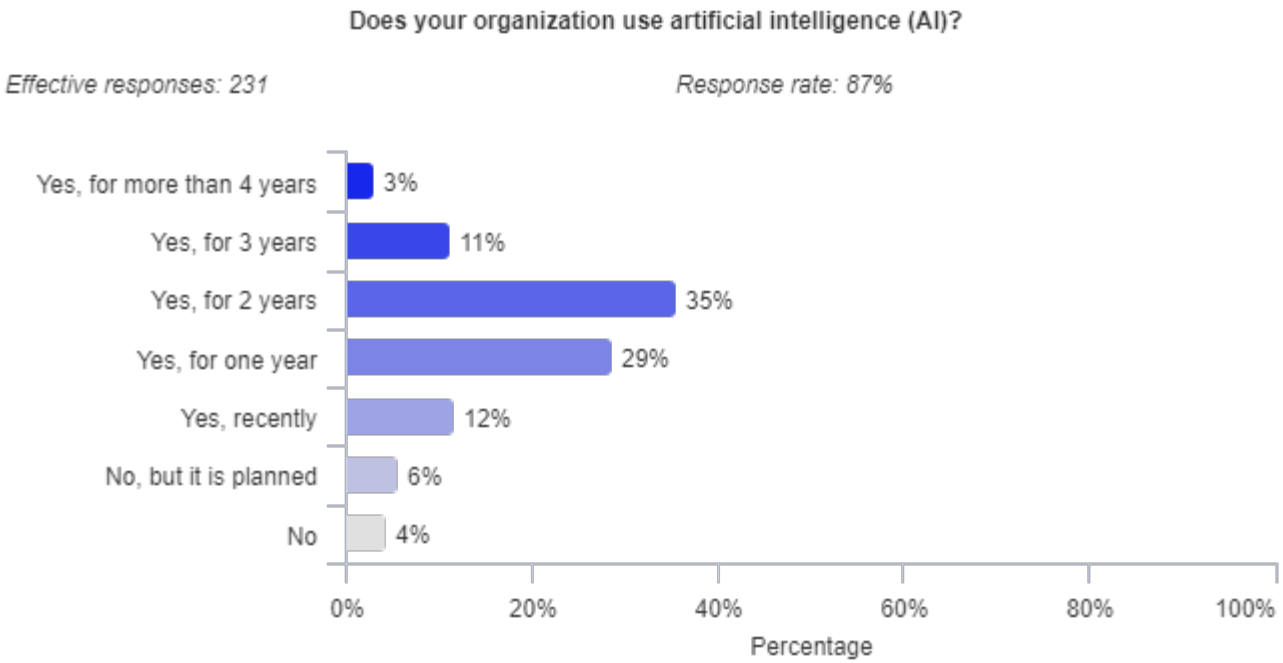
Differences do emerge, however, between countries. Austria and Canada have the highest averages (8.1), with a strong concentration of responses in the 8 to 10 range, reflecting a particularly strong perception of AI's transformative potential. Switzerland also shows a high perception (7.6) and marked growth between 2023 and 2025. France shows a slightly more moderate average (7.5) and a wider dispersion of responses.

These differences should, however, be interpreted with caution, as the samples differ significantly across countries, both in size and structure. France has a larger and more heterogeneous sample, including more small DMOs, while Canada and Austria rely on smaller samples that may be more heavily composed of organizations already engaged in digital transformation. The observed differences therefore reflect both distinct national contexts and sample composition effects.

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Use of AI by DMOs
(global sample, 4 countries)



Artificial intelligence is already widely integrated into the tourism offices of the four countries studied: nearly 90% of DMOs report using AI, with a majority having done so for one to two years. This shows that AI is no longer perceived as an experimental technology, but as a tool that is gradually being integrated into destinations' operational and marketing practices.

However, the small proportion of organizations that have been using AI for more than three or four years also highlights the still-recent nature of this transformation and the fact that most DMOs are still in a learning and adoption phase.

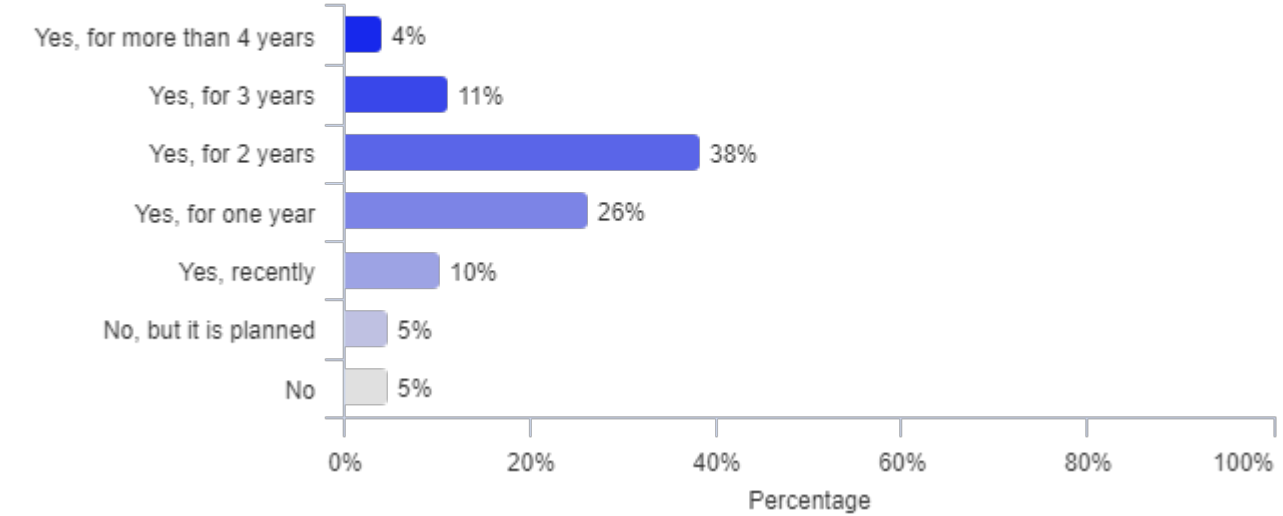
Use of AI by DMOs

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

Does your organization use artificial intelligence (AI)?

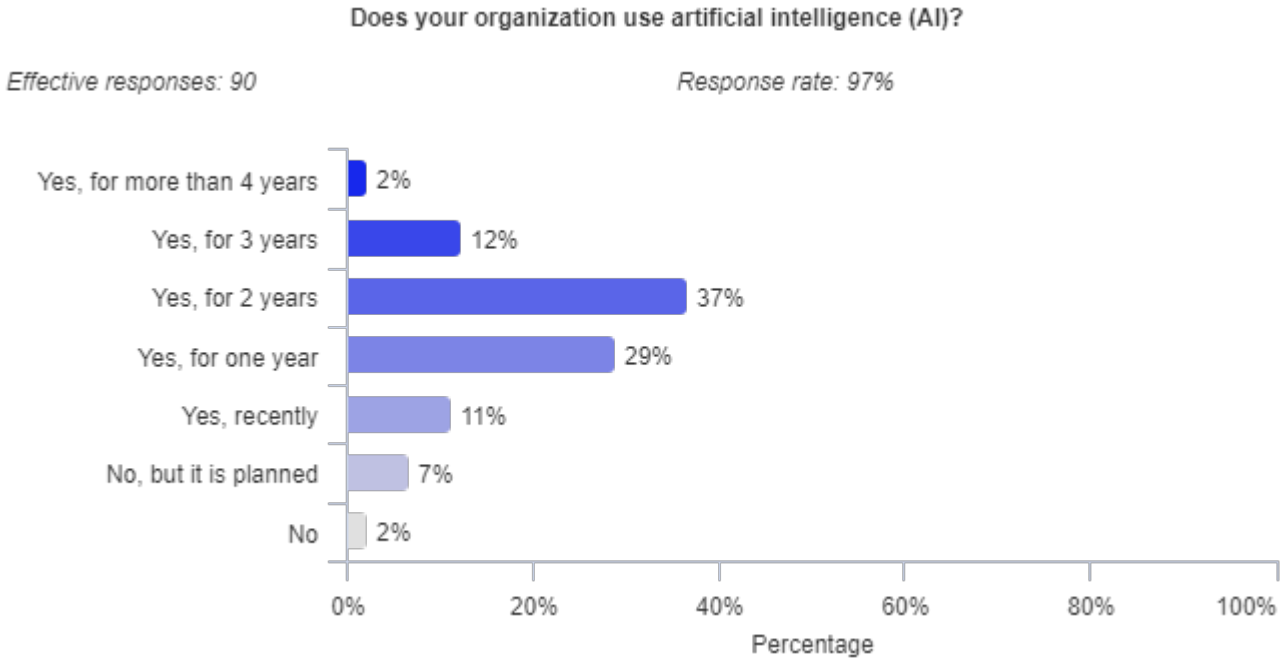
Effective responses: 125

Response rate: 100%

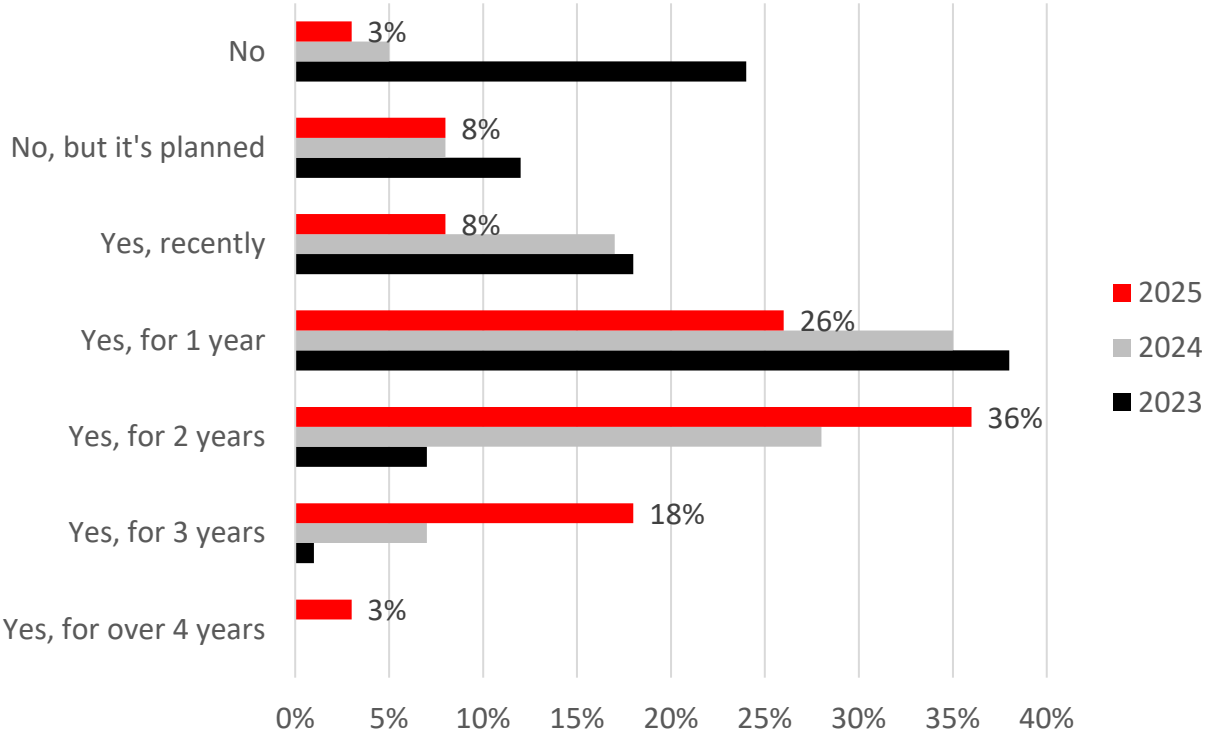


Use of AI by DMOs

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



Trends in AI Adoption by DMOs in Switzerland Between 2023 and 2025



The trend between 2023 and 2025 shows an extremely rapid adoption of artificial intelligence among Swiss DMOs. While in 2023 a significant proportion of organizations were not yet using AI or were still in the planning phase, the majority of DMOs now report having used these tools for one to three years.

This trend illustrates AI's rapid transition from an emerging technology to a tool that is gradually being integrated into destinations' operational, marketing, and strategic practices. It also suggests significant pressure to adapt in the face of digital transformations in the tourism sector.

AI Is Becoming the Norm in DMOs: Toward the Rapid Widespread Adoption of Digital Technologies

Artificial intelligence is now widely integrated into the DMOs of the four countries studied. Across the entire sample, a very large majority of organizations report already using AI, most often for one to two years. This shows that AI has rapidly transitioned from an experimental technology to an operational tool used in marketing, content creation, data analysis, and automation.

The results also highlight that the sector remains in a relatively early phase of adoption. Few DMOs have been using AI for more than three or four years, indicating that most organizations are still in a phase of learning, experimenting, and structuring their use of the technology.

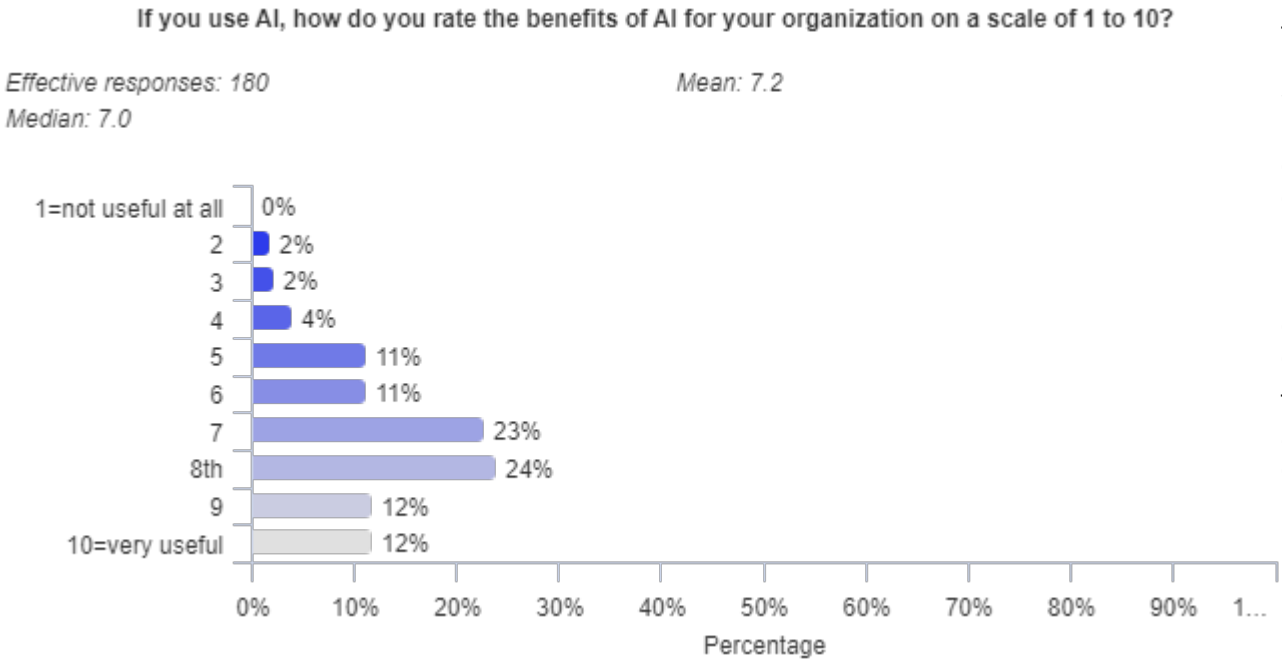
In the four countries studied, artificial intelligence is now widely integrated into DMOs' practices, although maturity levels differ slightly, probably due to the sample structure. Austria and Canada appear to be the most advanced markets, with adoption already well-established for two to three years and very few organizations not yet using AI. France shows significant but more heterogeneous adoption, reflecting disparities in resources and organizational structure among destinations. In Switzerland, adoption has accelerated sharply over the past two years, confirming a phase of rapid integration of AI tools into DMOs' marketing, communication, and analytical activities.

Overall, the results show that AI has quickly evolved from an emerging technology to a strategic tool on the path to becoming standard practice in the management of tourist destinations.

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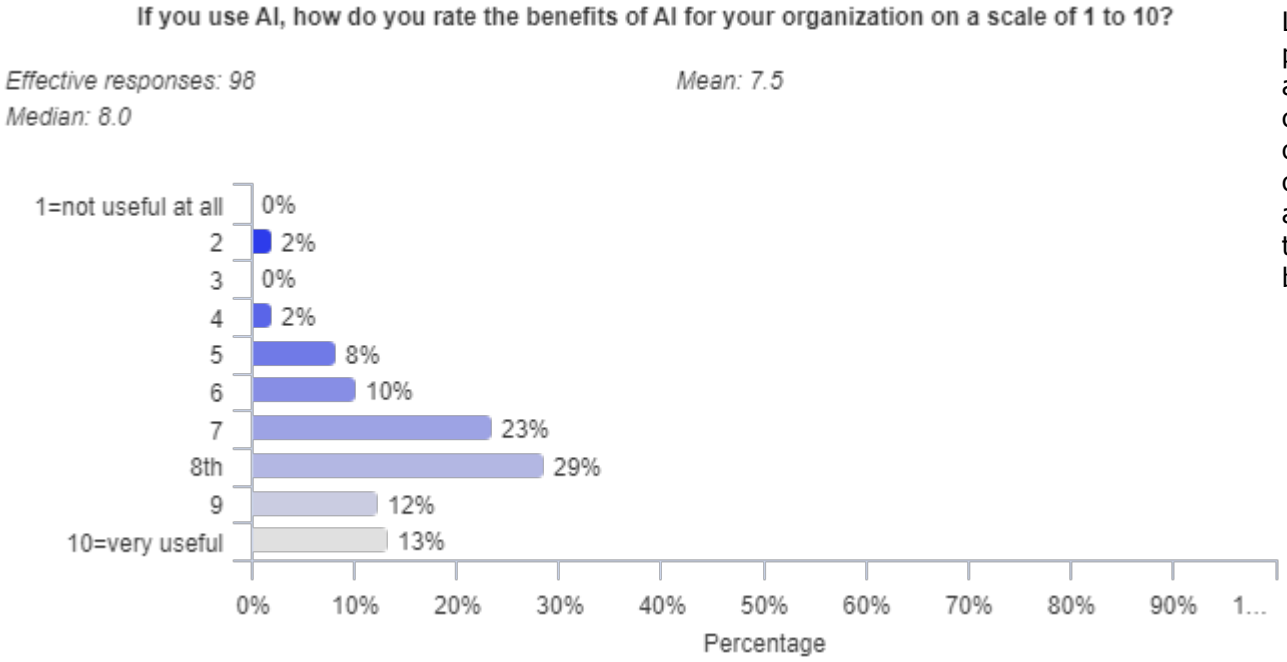
Perceived usefulness of AI for DMOs using the technology (overall sample, 4 countries)



The perceived usefulness of artificial intelligence by DMOs is generally positive, with an average score of 7.2 out of 10, but the results still reflect a certain phase of learning and exploration. While scores of 7 and 8 dominate, a significant portion of respondents also assign intermediate ratings (5 and 6), indicating that the benefits of AI are not yet fully established or uniformly recognized within tourism organizations.

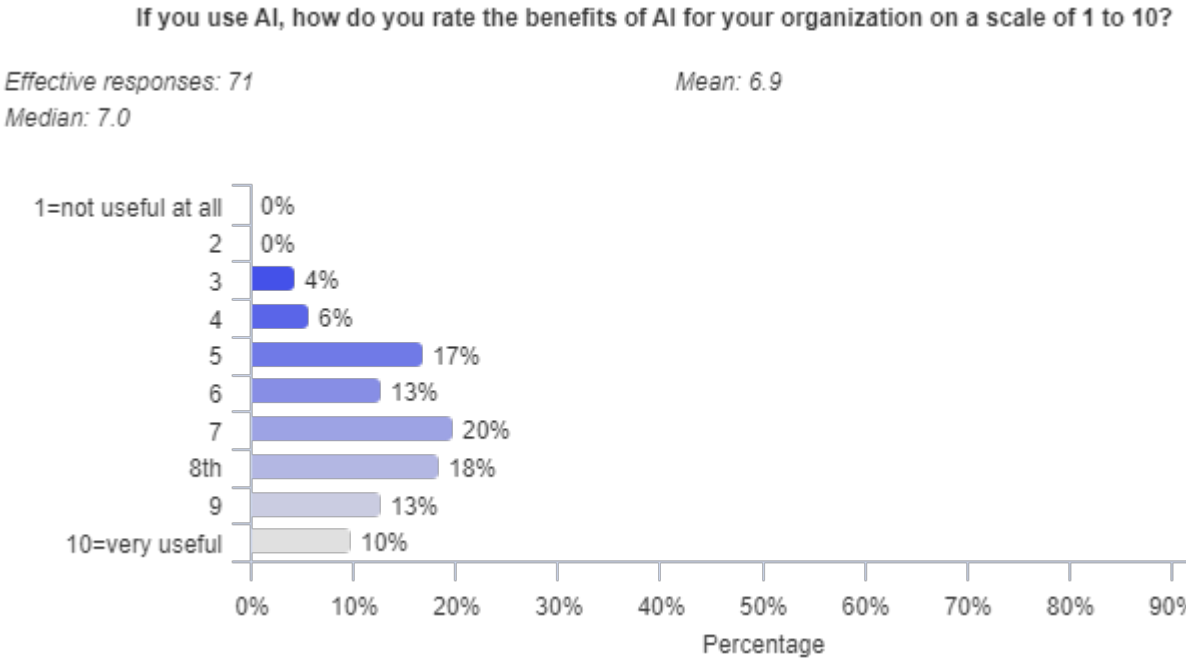
These results suggest that many DMOs already recognize the concrete potential of AI, but its use often remains recent, limited, or experimental.

Perceived usefulness of AI for DMOs
(overall sample, 4 countries, DMOs > 500,000 overnight stays)



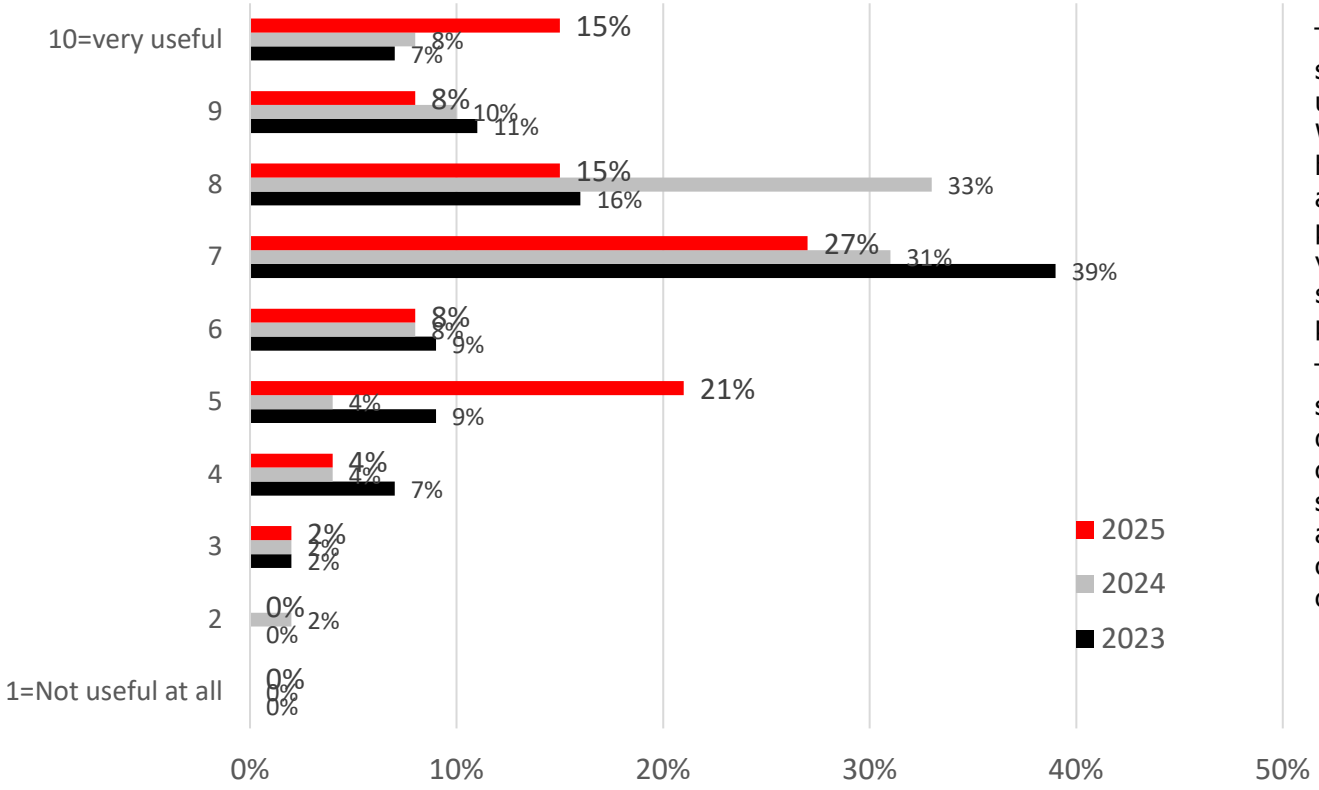
Large DMOs (>500,000 overnight stays) perceive a higher utility of AI, with an average of 7.5/10 and a stronger concentration of responses around scores of 7 to 10. This suggests that organizations with more resources, data, and internal capabilities are better able to translate AI into concrete operational benefits.

Perceived usefulness of AI for DMOs
(overall sample, 4 countries, DMOs < 500,000 overnight stays)



Smaller DMOs (<500,000 overnight stays) report a more moderate perception of the usefulness of AI (average: 6.9/10), with a higher proportion of intermediate responses (5 and 6). These results show that, despite strong recognition of AI's strategic potential, smaller organizations still seem to face greater difficulties in fully realizing its value in their daily operations.

Trends in the Perceived Usefulness of AI for Swiss DMOs Between 2023 and 2025



The trend between 2023 and 2025 shows a more mixed perception of the usefulness of AI among Swiss DMOs. While in 2023 and 2024 responses were heavily concentrated around scores of 7 and 8, 2025 is characterized by a more pronounced polarization: the share of very high scores (10) increases significantly, but average scores, particularly 5, also rise sharply.

This trend suggests that AI is gradually shifting from a relatively consensus-driven discovery phase to a more concrete experimentation phase, where some DMOs already perceive significant added value, while others remain more cautious due to operational limitations, costs, or integration challenges.

Perceived Value of AI: Between Recognized Potential and the Still Uneven Maturity of Digital Marketing Platforms

The overall analysis shows that DMOs now perceive AI as a tool with real and growing utility, but with a level of enthusiasm that remains moderate. Across all four countries, the average score is 7.2/10, reflecting an overall positive assessment, though not yet indicating fully mature or uniform adoption. Responses are concentrated mainly between scores of 7 and 8, while a significant portion of respondents still assign intermediate scores (5 and 6), a sign that many organizations remain in an experimental phase or are still struggling to translate AI into clearly perceptible operational gains.

Canada has the most positive perception of AI's usefulness, with a strong concentration of responses around high scores, suggesting that adoption is already relatively integrated into DMOs' practices. **Austria** also shows a favorable perception, marked by a significant proportion of respondents giving the highest score, a sign of perceived high potential. **Switzerland** takes a more balanced stance: DMOs clearly recognize the strategic value of AI, but with a more nuanced and pragmatic assessment. In **France**, the perception is more cautious, with a higher proportion of mid-range ratings, reflecting a phase that is still exploratory, where the concrete benefits of AI have not yet been fully established.

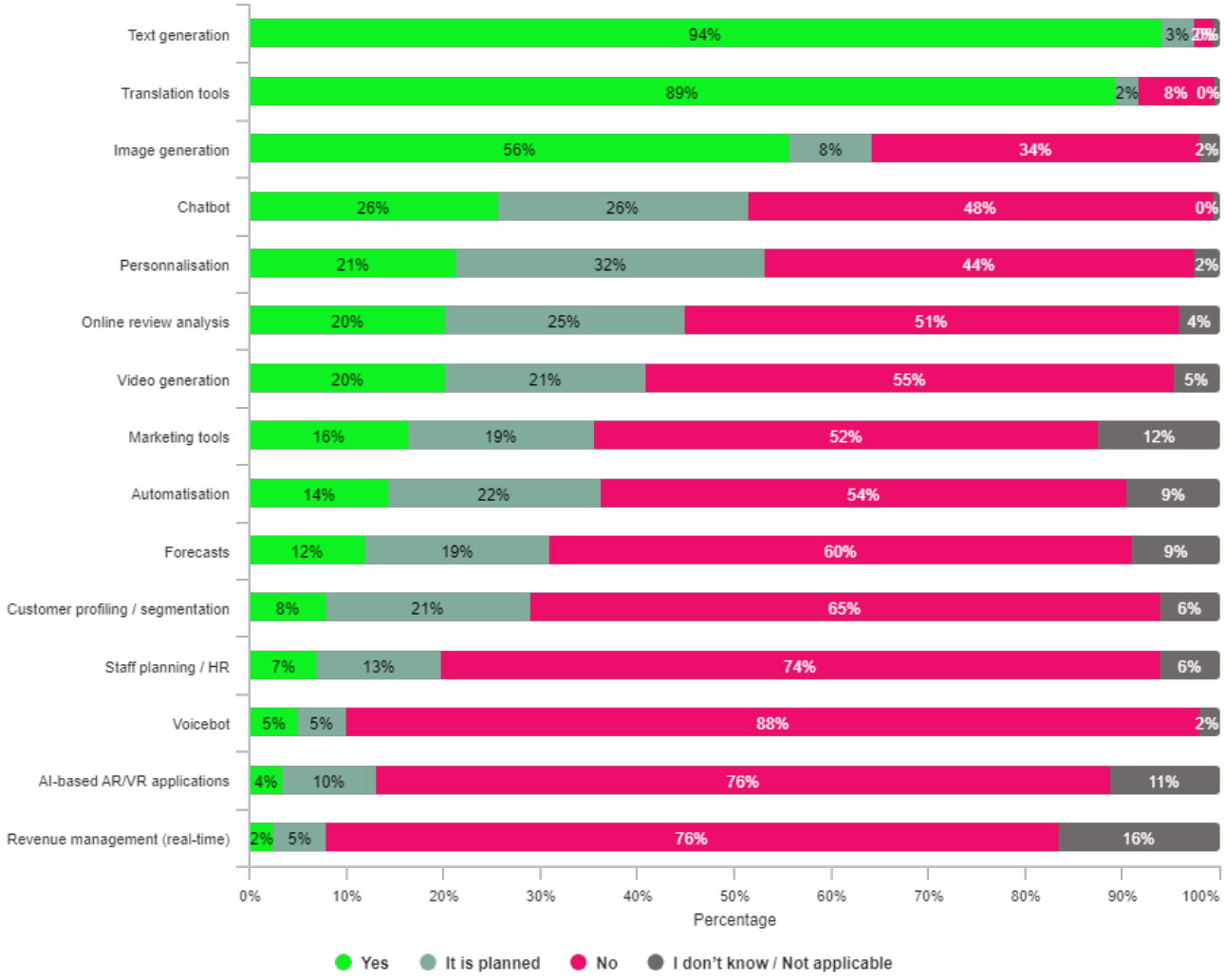
These results should, however, be interpreted with caution given the differences in sample size and structure across countries, particularly for Canada and Austria, where the sample sizes are smaller.

Despite this, a common trend emerges: DMOs now view AI as a credible and potentially transformative strategic issue, but its perceived utility still depends heavily on organizations' digital maturity, their internal resources, and their ability to integrate AI into concrete, operational processes.

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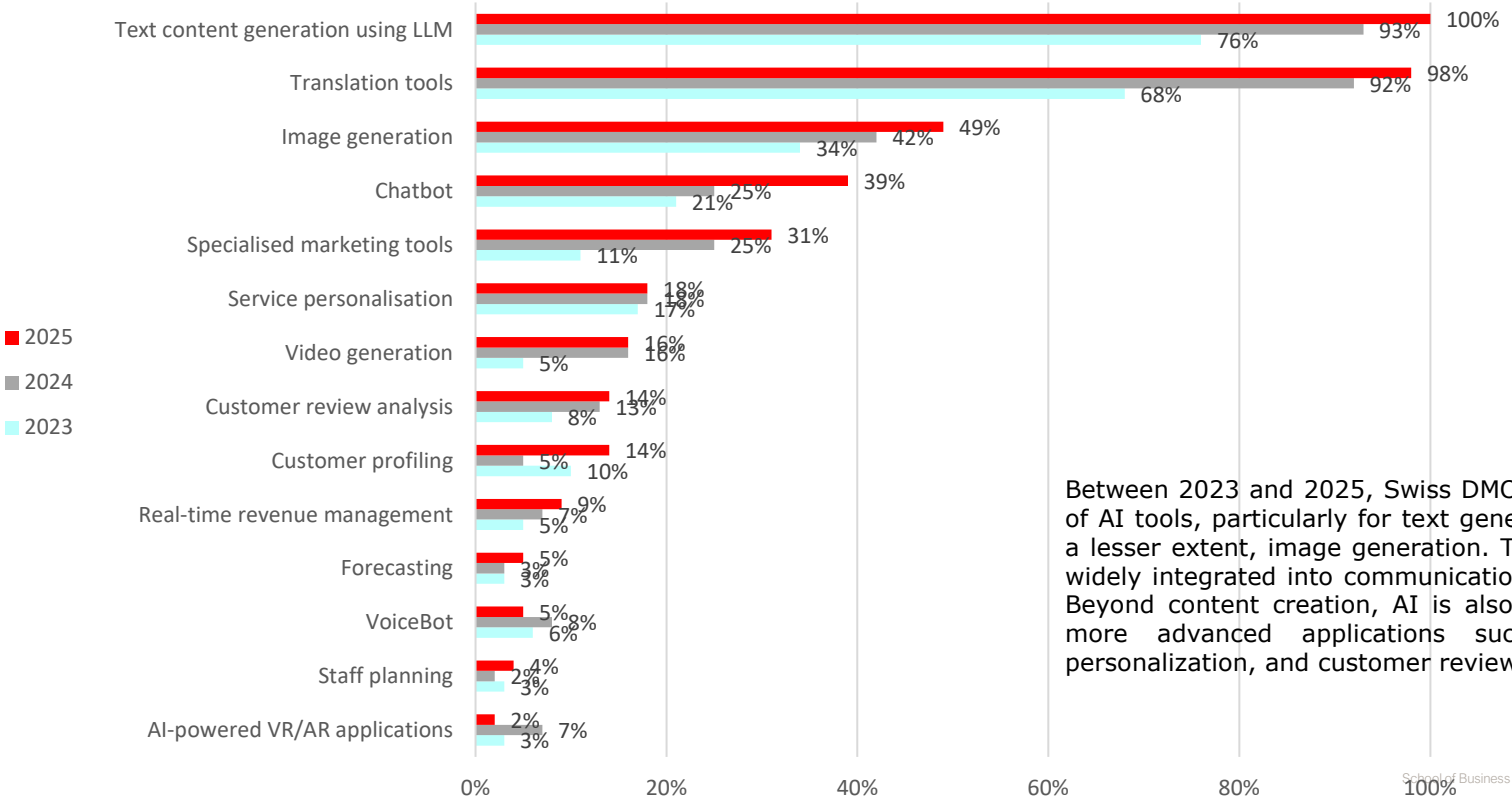
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AI technologies currently in use or under consideration
(global sample, 4 countries)



Hes·so VALAIS WALLIS

AI Technologies Used in Switzerland: Trends from 2023 to 2025



Between 2023 and 2025, Swiss DMOs have increased their use of AI tools, particularly for text generation, translation, and, to a lesser extent, image generation. These technologies are now widely integrated into communication and marketing activities. Beyond content creation, AI is also beginning to expand into more advanced applications such as chatbots, service personalization, and customer review analysis.

Other AI technologies (open-ended responses)



Other AI technologies (open-ended responses)

Strong dominance of general-purpose conversational AI

The open-ended comments very clearly confirm the central role played by general-purpose LLMs in current DMO applications. The most frequently mentioned tools are ChatGPT, Copilot, Claude, Gemini, Perplexity, and Mistral's Le Chat. These solutions are primarily used for content generation, information retrieval, writing assistance, or support for daily productivity. Several respondents also mention the simultaneous use of multiple assistants, a sign of an active exploration phase where organizations are testing different AI ecosystems depending on their use cases.

A Rise in Multimedia and Creative Uses

The comments also highlight the growth of AI tools dedicated to visual, audio, and video creation. Solutions such as Adobe Firefly, Canva, Runway, HeyGen, ElevenLabs, and Gamma are used to generate images, videos, synthetic voices, or automated presentations. These uses reflect the growing importance of rapid marketing content production within DMOs. Here, AI serves as a catalyst for creativity, but above all as a tool to accelerate communication processes.

Productivity- and automation-oriented uses

Several organizations use AI tools integrated into their daily work environments, such as Microsoft Copilot, Notion AI, Zoho Zia, or internal conversational assistants via POE or RAG ("Retrieval-Augmented Generation") systems. These applications demonstrate a desire to go beyond simple marketing content and gradually integrate AI into internal workflows, document management, information retrieval, and team support.

Other AI technologies (open-ended responses)

The growing importance of translation and language management tools

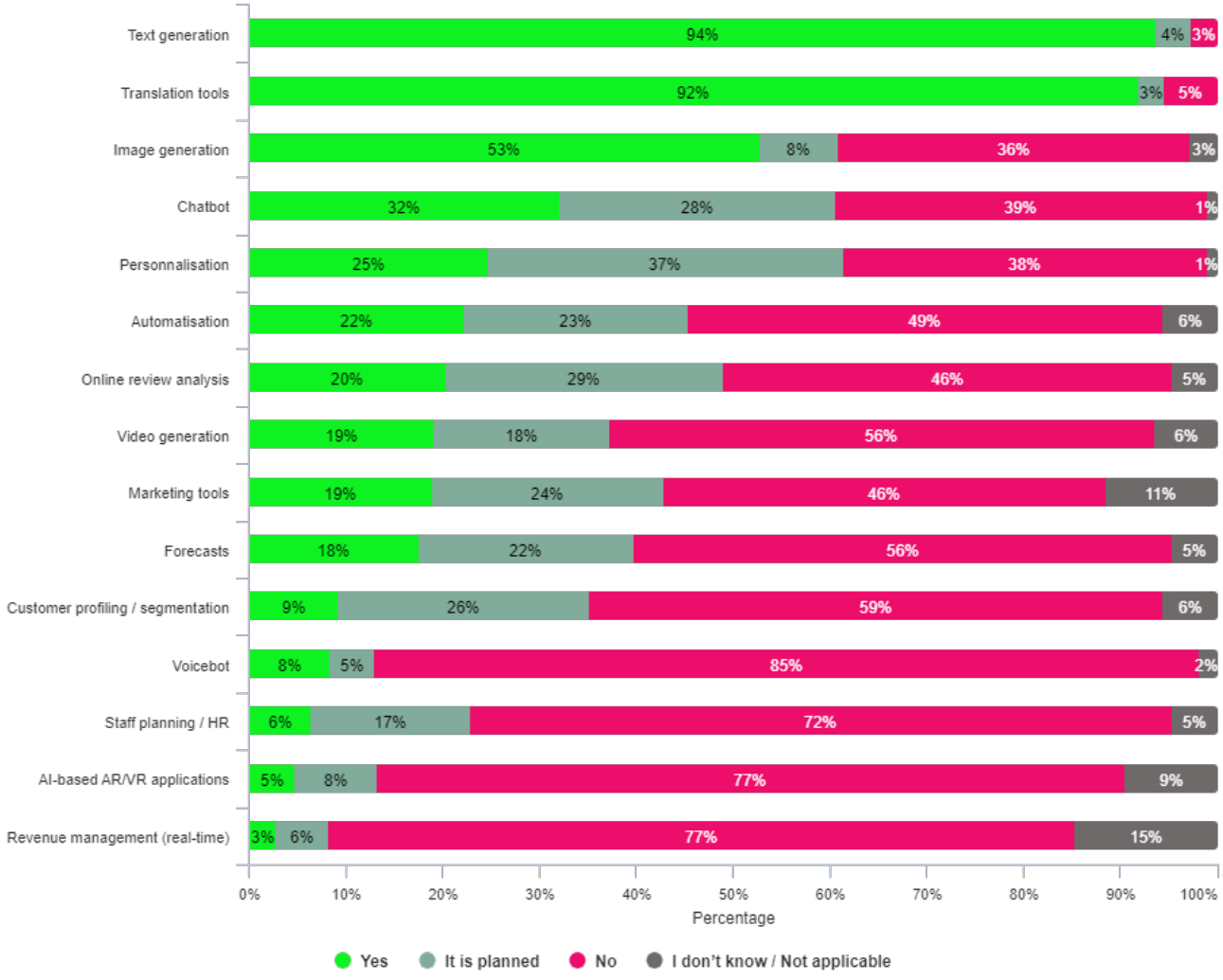
Tools related to machine translation remain particularly prevalent, notably DeepL and translation APIs integrated into websites. This confirms the strategic importance of multilingualism in tourism and the immediate role of AI in optimizing international content.

Experiments that are still scattered and largely unstandardized

Finally, the responses reveal a technological landscape that remains highly fragmented and experimental. Several specialized tools are mentioned only once (Tourisme AI, Appica, Limova, Genial Travel, Vapi, Plaud, Dicte AI, joaia, etc.), suggesting that DMOs are still in a phase of testing and exploration rather than standardization. This diversity illustrates both the dynamism of the AI solutions market and the current absence of dominant or established models in the tourism sector.

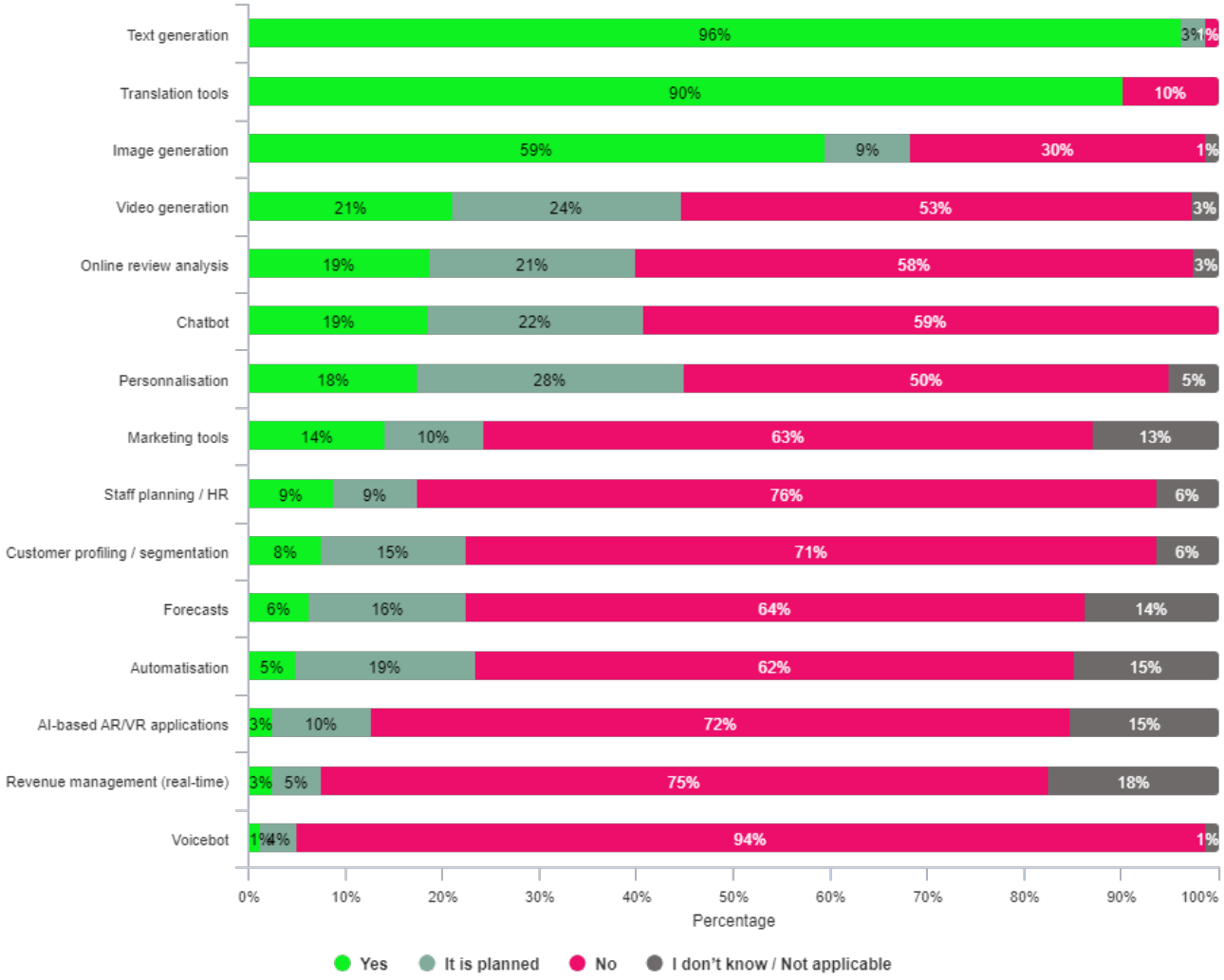
AI technologies currently in use or under consideration

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



AI technologies currently in use or under consideration

(overall sample, 4 countries, DMO < 500,000 overnight stays)



AI applications remain focused on content, with greater maturity in large DMOs (I)

The results show that the current use of AI in DMOs remains heavily **concentrated on simple and accessible applications, particularly text generation** using LLMs (94%) and **translation tools** (89%), which have become virtually standard in tourism organizations. Image generation is also seeing significant adoption (56%), reflecting growing interest in marketing and communication applications.

Conversely, **more advanced applications or** those **integrated into business processes remain underdeveloped.** Tools related to automation, forecasting, customer profiling, or dynamic revenue management show low usage rates, although several DMOs are considering their adoption in the medium term. This suggests that AI is still primarily used as a productivity and content assistance tool, rather than as a true strategic lever for managing or optimizing data and operations.

The results show that **large DMOs** (>500,000 room nights) use **AI technologies more intensively and in a more diverse manner** than smaller organizations. They stand out in particular for their greater adoption of tools related to chatbots, automation, forecasting, service personalization, and customer review analysis. This suggests that large organizations have greater access to resources, data, and internal capabilities to experiment with more advanced and integrated uses of AI.

AI applications remain focused on content, with greater maturity in large DMOs (II)

Small and medium-sized DMOs (< 500,000 overnight stays) remain more focused on **the most accessible applications, particularly text generation, translation**, and image creation. For more complex applications—such as customer profiling, real-time revenue management, or automation tools—adoption rates remain low, although several organizations indicate they are considering adopting them in the medium term.

In both groups, however, a common trend is observed: **AI is currently used primarily as a tool to support marketing, communication, and content production**, while strategic applications based on data, automation, or decision optimization are still in their early stages.

Content-centric adoption of AI, with varying levels of maturity across countries (I)

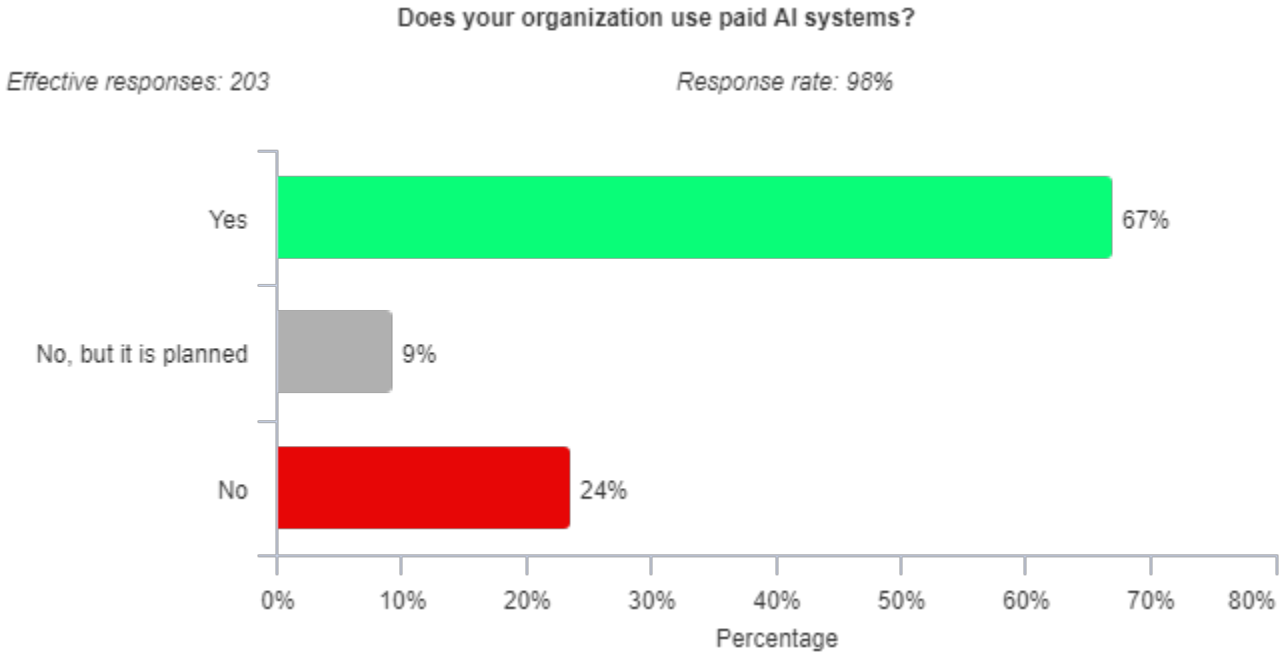
Country-by-country analysis reveals a strong consensus on one finding: current uses of AI in DMOs remain primarily **focused on content production and communication functions**, while more advanced applications related to data, automation, or decision-making optimization are still in their early stages. Across all countries, text generation using LLMs and translation tools is now nearly universal, with particularly high usage rates in Switzerland and Austria. Image generation is also emerging as a significant use case, especially in France, where it has reached particularly high adoption levels.

However, there are differences in the maturity of the applications (largely influenced by the sample structure in the individual countries). **Austria** stands out for its relatively diverse and advanced adoption of AI, particularly for chatbots, forecasting, service personalization, and automation tools, reflecting a more proactive and experimental approach. **Canada** also has several advanced use cases in development, with a high proportion of organizations planning to implement applications related to customer profiling, marketing tools, or automation in the near future, even though sample sizes remain limited. **Switzerland** shows high adoption of content tools, but also a notable presence of uses related to specialized marketing tools, suggesting a growing interest in more sophisticated applications. In contrast, **France** appears more cautious: despite strong adoption of content and image generation tools, advanced uses related to automation, forecasting, or customer profiling remain underdeveloped.

Content-centric adoption of AI, with varying levels of maturity across countries (II)

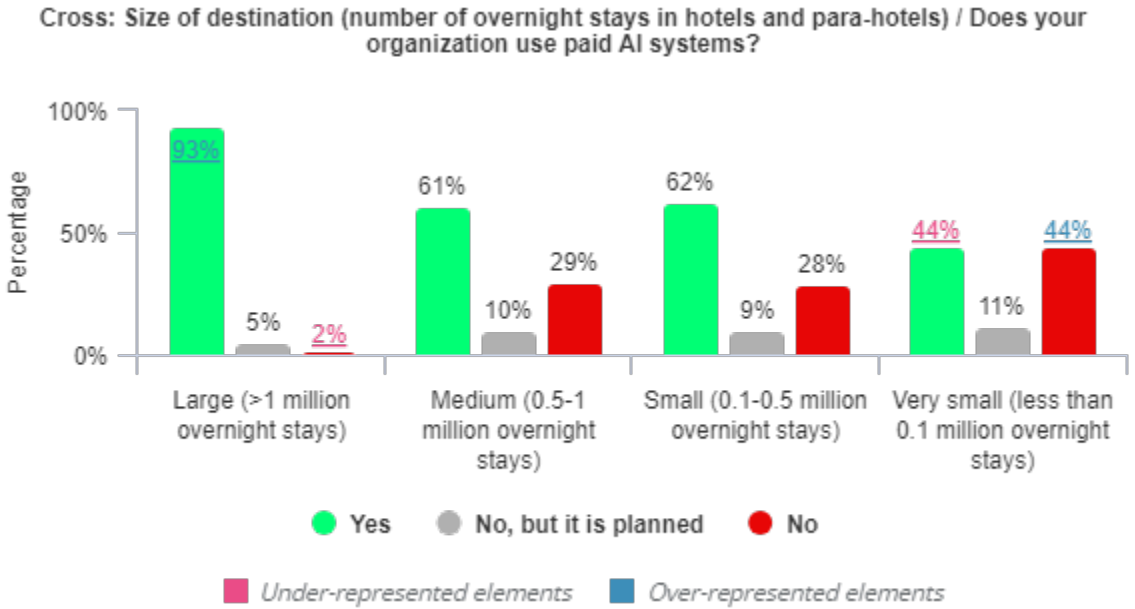
In all countries, certain technologies such as AI avatars, voicebots, real-time revenue management, and AI-based VR/AR applications remain marginal. This confirms that AI is still primarily used as **an operational and creative support tool, while its integration into DMOs' strategic, analytical, or transactional processes remains at a relatively early stage**.

Paid AI tools are becoming the norm in DMOs



The results show that 67% of DMOs already use paid AI tools, a sign that AI is increasingly viewed as a strategic business tool rather than merely an experimental one. However, nearly a quarter of organizations do not yet use them, likely due to budget constraints or a still-limited level of maturity.

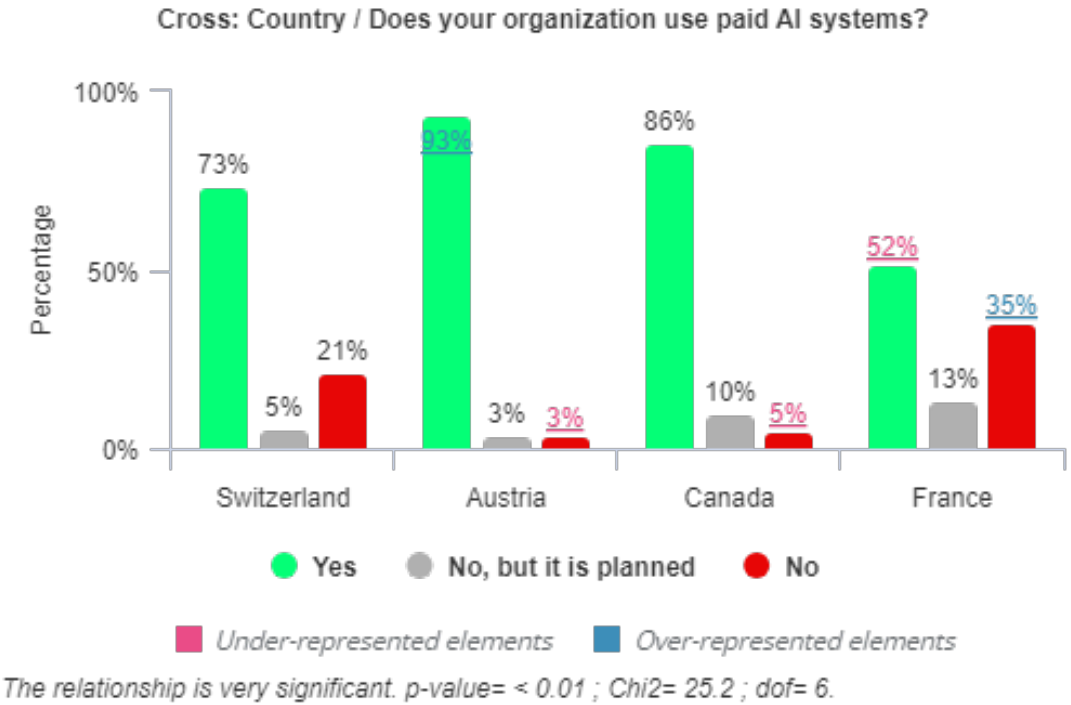
Major destinations are investing more in paid AI tools



The relationship is very significant. p-value= < 0.01 ; Chi2= 29.3 ; dof= 6.

The use of paid AI models increases significantly with the size of the destination. Large DMOs (>1 million overnight stays) show a very high adoption rate (93%), while very small destinations are much more divided, with only 44% usage and an equivalent proportion of non-users. These results suggest that financial resources, internal expertise, and organizational capabilities play a decisive role in the integration of professional AI solutions.

Significant differences between countries in the adoption of paid AI tools



The use of paid AI tools varies significantly by country. Austria (93%) and Canada (86%) stand out for their very high adoption rates, reflecting a more proactive and professional approach to AI within DMOs. Switzerland also ranks high (73%), while France appears significantly more cautious, with only 52% of DMOs using paid solutions and more than a third not yet utilizing them. These disparities likely reflect differences in organizational size (sample structure), available resources, digital maturity, and strategic priorities.

Comments from DMOs: Between Pragmatic Enthusiasm, Support Needs, and Strategic Questions Regarding AI (I)

The open-ended comments show that DMOs view AI primarily as a **tool for saving time and providing operational support**, particularly for content generation, tourism descriptions, metadata, translations, and certain administrative tasks. Several respondents emphasize that **AI already enables them to produce more with the same resources and to automate certain repetitive tasks**. However, its uses remain primarily focused on communication and content creation, confirming the survey's quantitative results.

At the same time, the responses reveal **a significant need for cultural adaptation and training**. Many organizations recognize the strategic potential of AI but indicate that they are unsure where to start or how to practically integrate these tools into their operations. **Knowledge gaps between employees and among stakeholders within a destination** are also cited as a major challenge. Respondents emphasize the importance of practical support, training tailored to tourism, and the sharing of best practices to foster adoption of the tools.

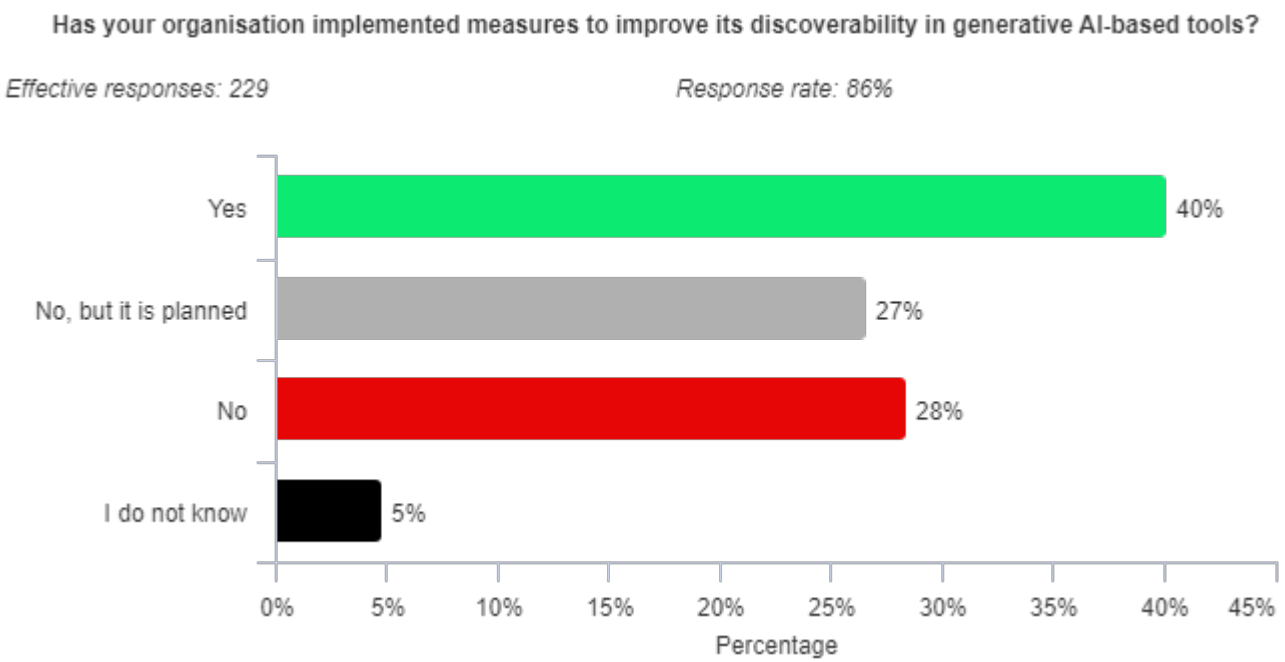
The comments also highlight **cultural and organizational resistance**. Several DMOs mention unease regarding the rapid pace of the ongoing transformation, the difficulty of sustainably integrating AI into internal processes, and the need to "push" teams to experiment with the tools. Some respondents speak of a technological "hype" whose truly useful applications have yet to be clarified.

Comments from DMOs: Between Pragmatic Enthusiasm, Support Needs, and Strategic Questions Regarding AI (II)

Another key theme concerns the **tension between AI, regional authenticity, and sustainability values**. Some organizations express concerns about the environmental impact of AI or the compatibility of these technologies with their CSR commitments and human values. Others fear excessive dependence on automated tools and emphasize the importance of human judgment, regional roots, and on-the-ground knowledge. Several comments thus highlight that the main strength of DMOs remains their role as a trusted third party, their proximity to local stakeholders, and their capacity for coordination—aspects considered difficult to replace by platforms or AI systems.

Finally, several respondents highlight an **emerging strategic challenge: the need to mobilize the entire tourism value chain to preserve destinations' visibility in digital environment** increasingly dominated by platforms, LLMs, and recommendation systems. The comments thus suggest that the challenge of AI is no longer limited to the simple adoption of tools, but now extends to data governance, digital visibility, and the future role of DMOs in AI-driven tourism ecosystems.

Visibility in AI Tools—An Emerging Strategic Challenge



Only 40% of DMOs report having already implemented measures to improve their discoverability in generative AI-based tools, while 27% plan to do so in the near future. These results show that the topic is gaining importance, but that many organizations are still in the exploration or learning phase when it comes to the new visibility challenges in AI-driven ecosystems.

Training and content at the heart of AI visibility strategies



The open-ended responses show that the main actions implemented by DMOs to improve their visibility in LLMs primarily involve team training, content production and optimization, as well as building proficiency in new AI tools. Organizations also mention data tagging, website improvements, discoverability audits, and strategic monitoring. This analysis suggests that DMOs still largely view AI visibility as a matter of organizational adaptation and content quality, rather than a purely technical or algorithmic issue.

AI Visibility Strategies for DMOs (I): Between Acculturation, Content, and Data Structuring

Analysis of **the open-ended responses** shows that DMOs are currently addressing the issue of visibility in generative AI-based tools through several complementary approaches, though with levels of maturity that still vary widely.

A key finding concerns the importance placed on **training** and internal **acculturation**. Many organizations mention training sessions, webinars, workshops, or external coaching for their teams, sometimes accompanied by the appointment of AI liaisons or the creation of dedicated working groups. The responses show that many DMOs still view AI as an emerging field requiring, above all, an increase in employee skills before a clear operational strategy can be defined.

The second dominant focus concerns **content production and optimization**. Several respondents mention rewriting web content, creating FAQs, adapting texts to the logic of LLMs, as well as as the conception of **GEO** (Generative Engine Optimization) **strategies**. The goal is to make content more understandable, reliable, and usable by generative AI systems. This trend confirms that DMOs increasingly view digital content as a key driver of visibility in future conversational and recommendation environments.

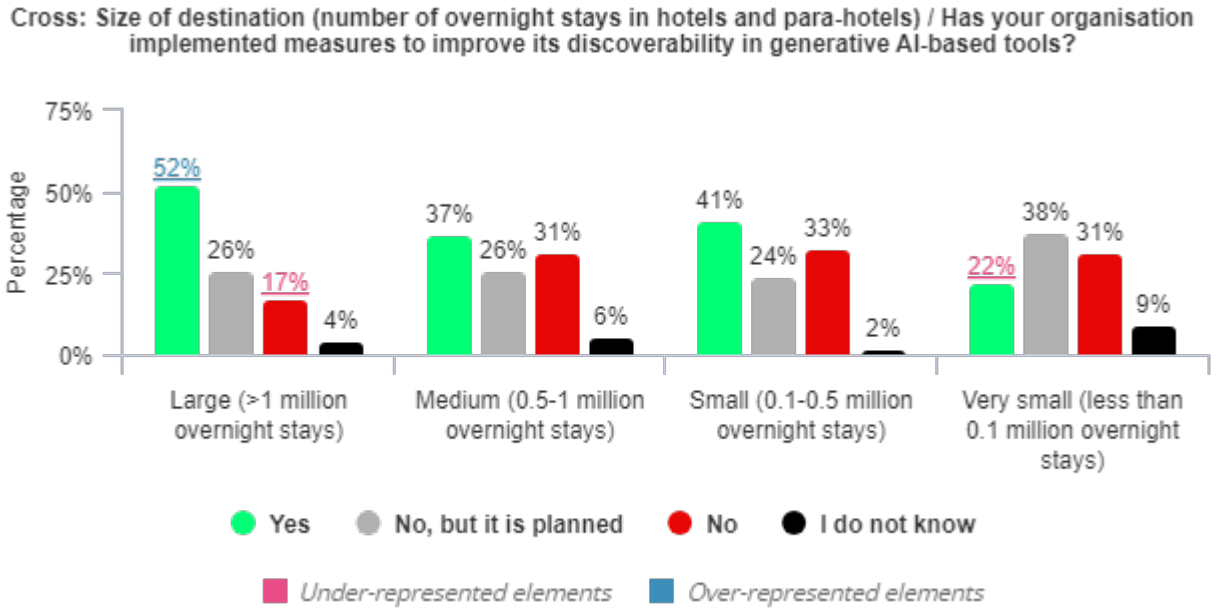
AI Visibility Strategies for DMOs (II): Between Acculturation, Content, and Data Structuring

A third recurring theme concerns **data structuring and governance**. Several organizations explicitly mention the use of structured data, the integration of **standards such as schema.org,** the centralization of tourism data, the improvement of machine readability of websites, and the challenges of open data and interoperability. These responses show that some DMOs are beginning to understand that future visibility within AI ecosystems will depend less on traditional search engine optimization than on the ability to provide structured, reliable, and accessible data to chatbots and AI engines.

The analysis also reveals a **strong focus on initiatives related to SEO, GEO, and the technical optimization of websites**. Several respondents mention content audits, website relaunches, improvements to web interfaces, markup, the creation of "AI-friendly" content, and the monitoring of discoverability using specialized tools. Some DMOs are already collaborating with external agencies or specialized firms to adapt their digital platforms to the new visibility strategies driven by AI.

Finally, the responses also highlight a **significant level of strategic uncertainty.** Several organizations indicate that they are "considering their options," "at the beginning of the process," or still searching for experts capable of supporting them. This suggests that, despite growing awareness of the challenges associated with LLMs, practices remain experimental and largely unstandardized in the tourism sector.

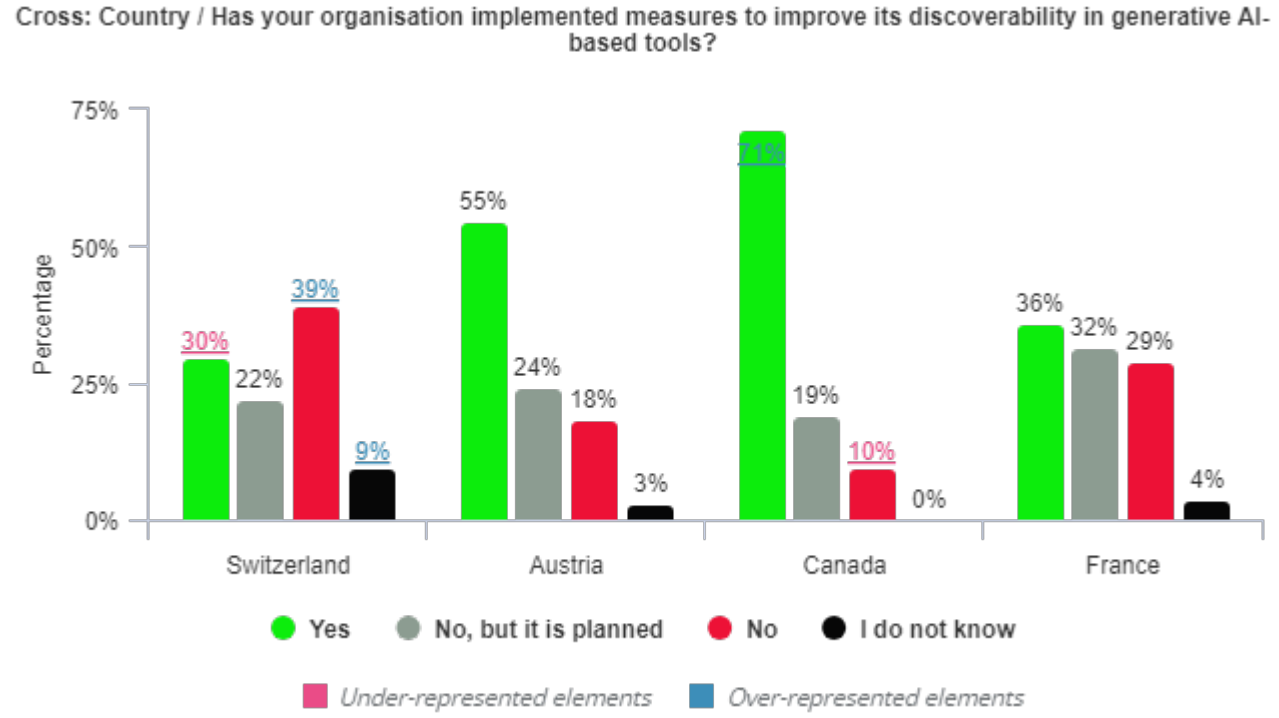
Major destinations are more advanced in their AI visibility strategies



The relationship is not significant. p-value= 0.2 ; Chi2= 13.0 ; dof= 9.

Major destinations appear to be more active in implementing measures to improve their discoverability in generative AI-based tools: more than half of major DMOs report having already taken concrete steps. Conversely, very small destinations seem more hesitant or in a wait-and-see phase, with more organizations indicating that the issue is only planned or not yet well understood. The results suggest that resources and strategic capabilities influence DMOs' preparedness to address new visibility challenges related to AI.

Significant variations in readiness to address AI visibility challenges by country



The relationship is very significant. p-value= < 0.01 ; Chi2= 21.9 ; dof= 9.

The results show significant differences between countries in the actions taken to improve discoverability in generative AI-based tools. Canada (71%) and Austria (55%) appear to be the most advanced, with a majority of DMOs having already taken concrete steps. Conversely, Switzerland is characterized by a high proportion of organizations that have not yet taken any action (39%), while France presents a more balanced situation, though one still marked by a wait-and-see attitude.

These results should, however, be interpreted with caution due to differences in the size and structure of the national samples.

Conclusion - AI Visibility: An Emerging Challenge for DMOs

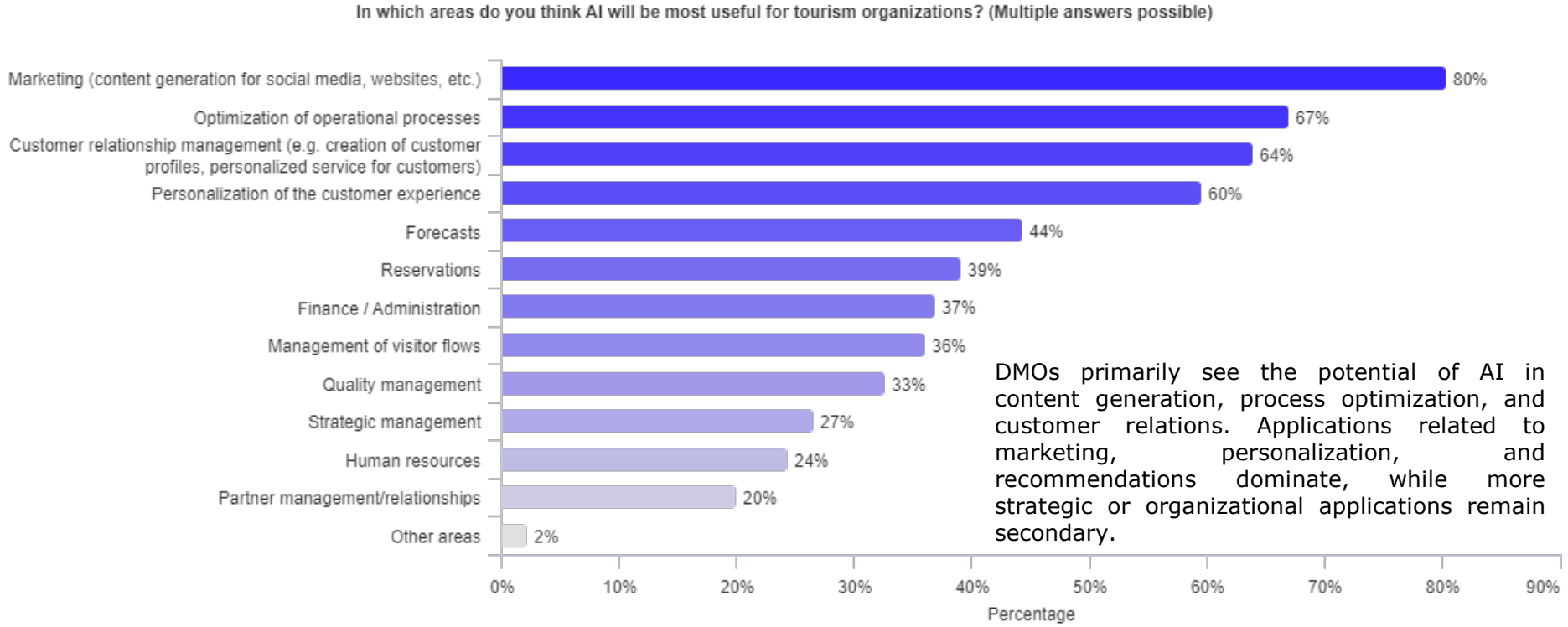
The results show that DMOs are gradually beginning to adapt their digital strategies to tools based on generative AI. The main actions implemented involve team training, content optimization, SEO/GEO, and, above all, data structuring to make content more readable by LLMs.

Analysis of the comments, however, reveals a sector still in the exploratory phase: many organizations are experimenting, seeking external expertise, or integrating these challenges into future web and data projects. Major destinations generally appear to be more advanced thanks to greater resources and technical capabilities.

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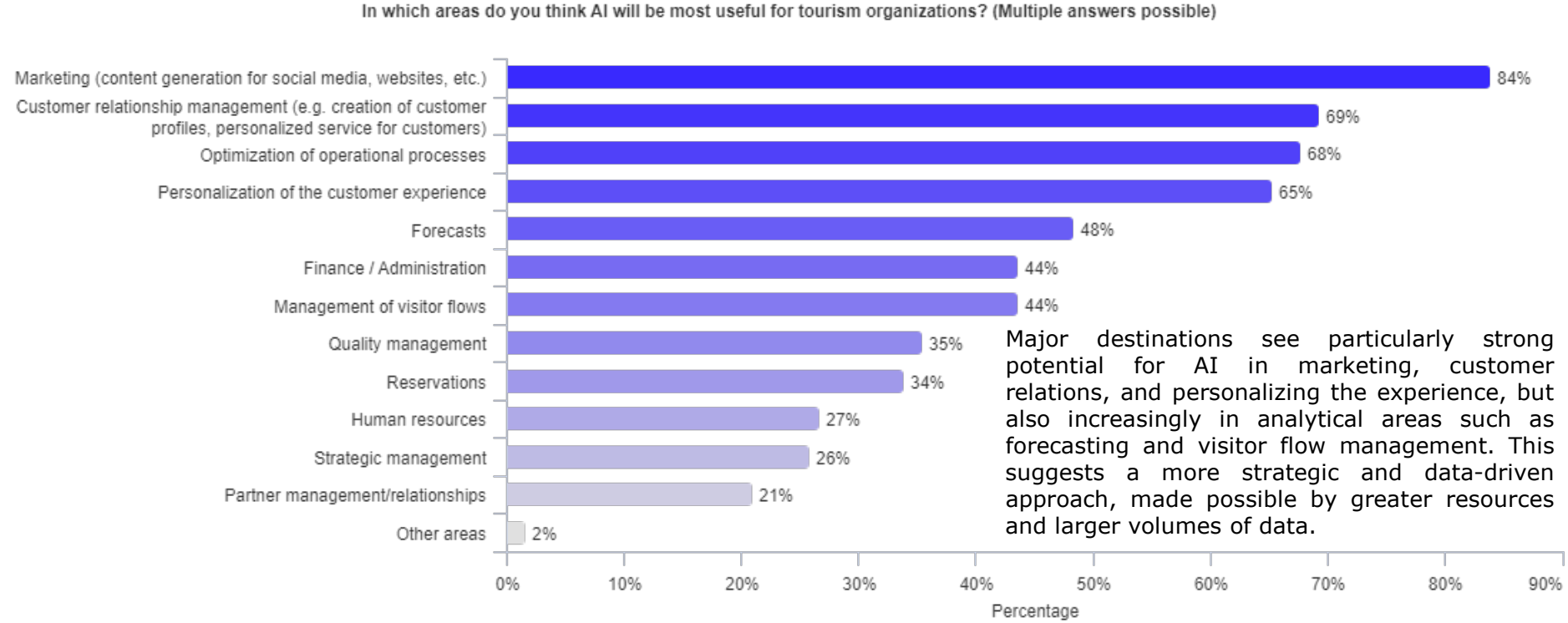
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Marketing and customer relations are seen as the main areas of potential for AI (global sample, 4 countries)



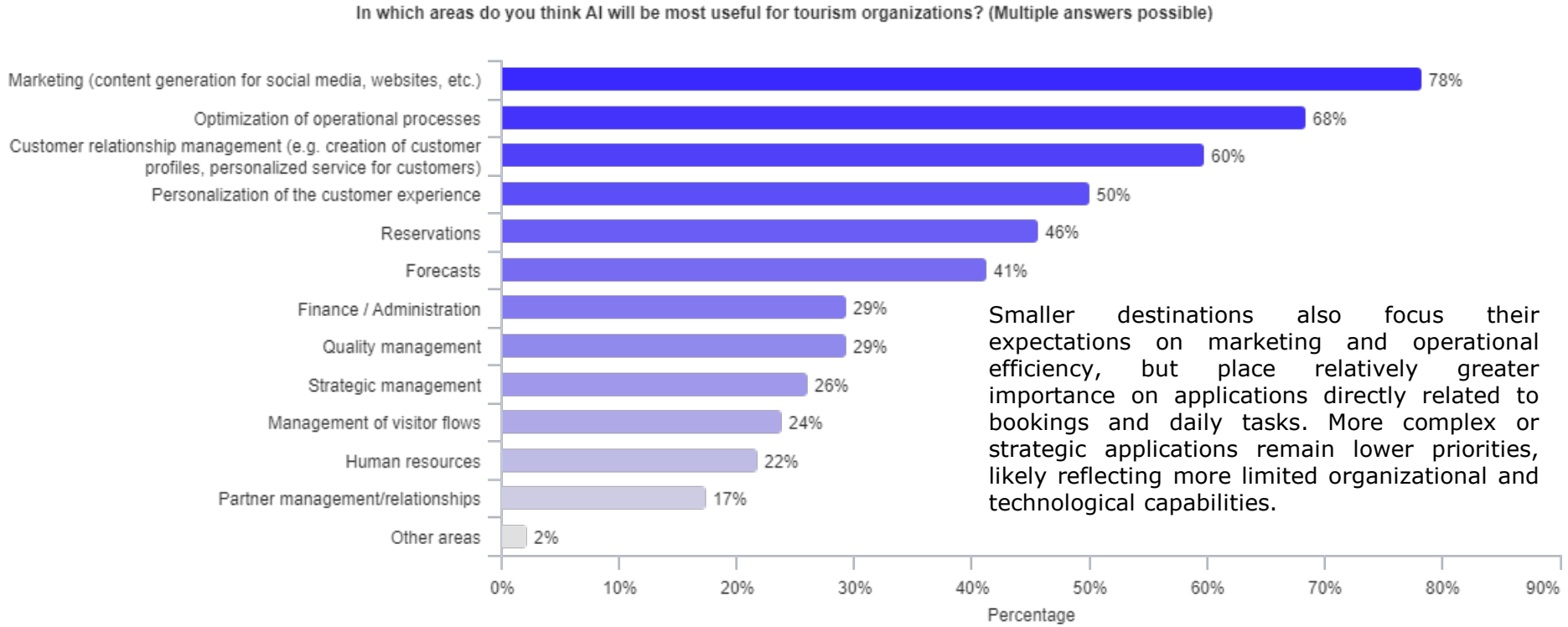
DMOs primarily see the potential of AI in content generation, process optimization, and customer relations. Applications related to marketing, personalization, and recommendations dominate, while more strategic or organizational applications remain secondary.

Marketing and customer relations are seen as the main areas of potential for AI (global sample, 4 countries, DMO > 500,000 room nights)



Major destinations see particularly strong potential for AI in marketing, customer relations, and personalizing the experience, but also increasingly in analytical areas such as forecasting and visitor flow management. This suggests a more strategic and data-driven approach, made possible by greater resources and larger volumes of data.

Marketing and customer relations are seen as the main areas of potential for AI (global sample, 4 countries, DMO < 500,000 room nights)



Smaller destinations also focus their expectations on marketing and operational efficiency, but place relatively greater importance on applications directly related to bookings and daily tasks. More complex or strategic applications remain lower priorities, likely reflecting more limited organizational and technological capabilities.

Overall analysis: largely converging priorities, with some country-specific differences

In all four countries, DMOs clearly identify **marketing** and **content generation** as the primary area of application for AI (75% to 90% depending on the country). Next come **customer relationship** management, **experience personalization**, and **the optimization of operational processes**, which shows that AI is primarily perceived as a lever for efficiency and improving the visitor experience rather than as a tool for strategic transformation.

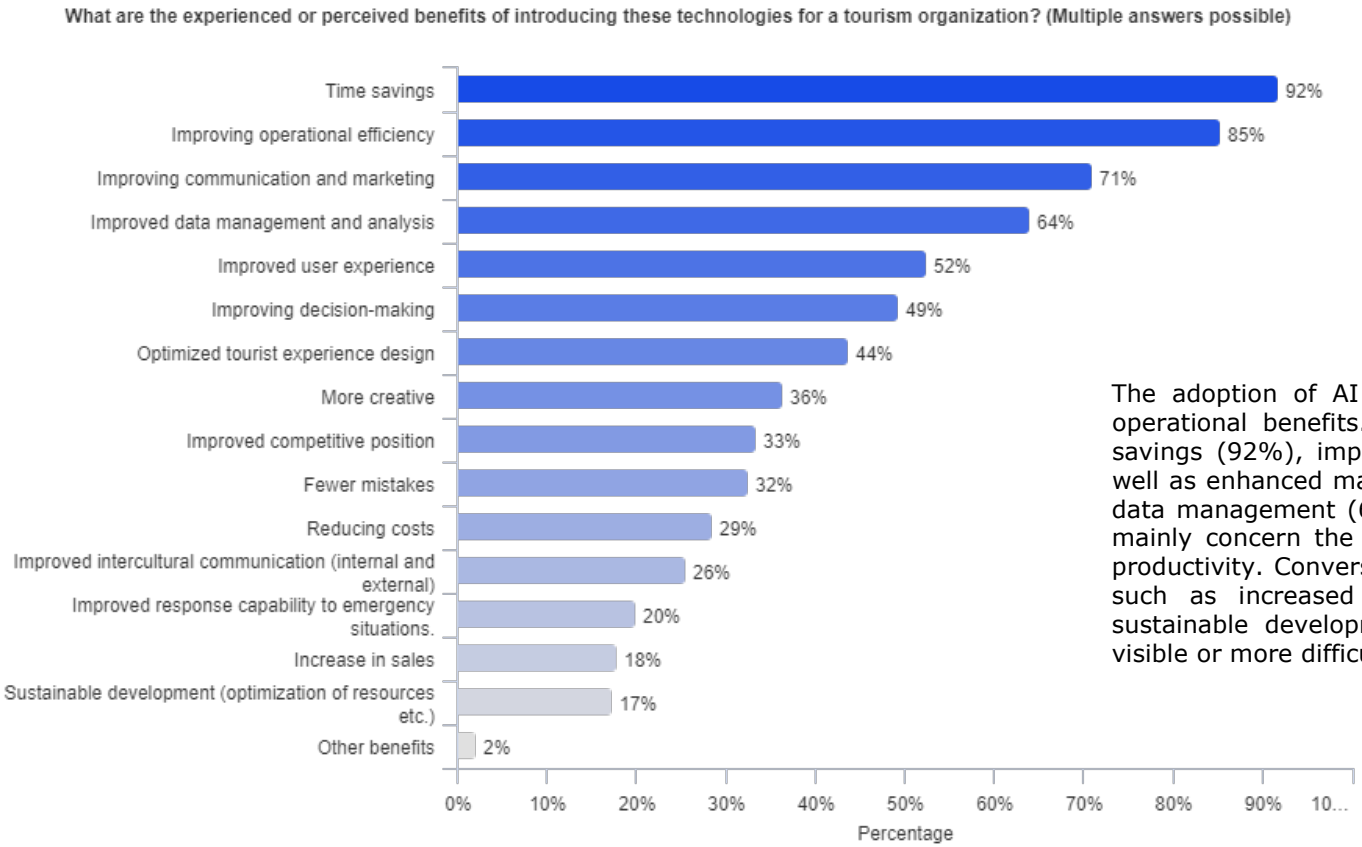
Differences do emerge, however, between countries. **Austria** stands out for its particularly strong interest in forecasting (76%) and visitor flow management (64%), reflecting a vision more focused on destination management and data utilization. **Canada** places greater emphasis on optimizing internal processes (90%) as well as on organizational functions such as finance, human resources, and partnership management, although these results should be interpreted with caution due to the small sample size. **Switzerland** is characterized by a strong emphasis on reservations (54%) and forecasting (54%), while **France** presents a more balanced profile, centered on marketing, customer relations, and personalization, with a more moderate interest in uses related to visitor flow management or advanced analytics.

Overall, AI is therefore primarily perceived as a tool for content creation, customer relations, and operational efficiency, while **more strategic or organizational uses remain secondary** in most destinations.

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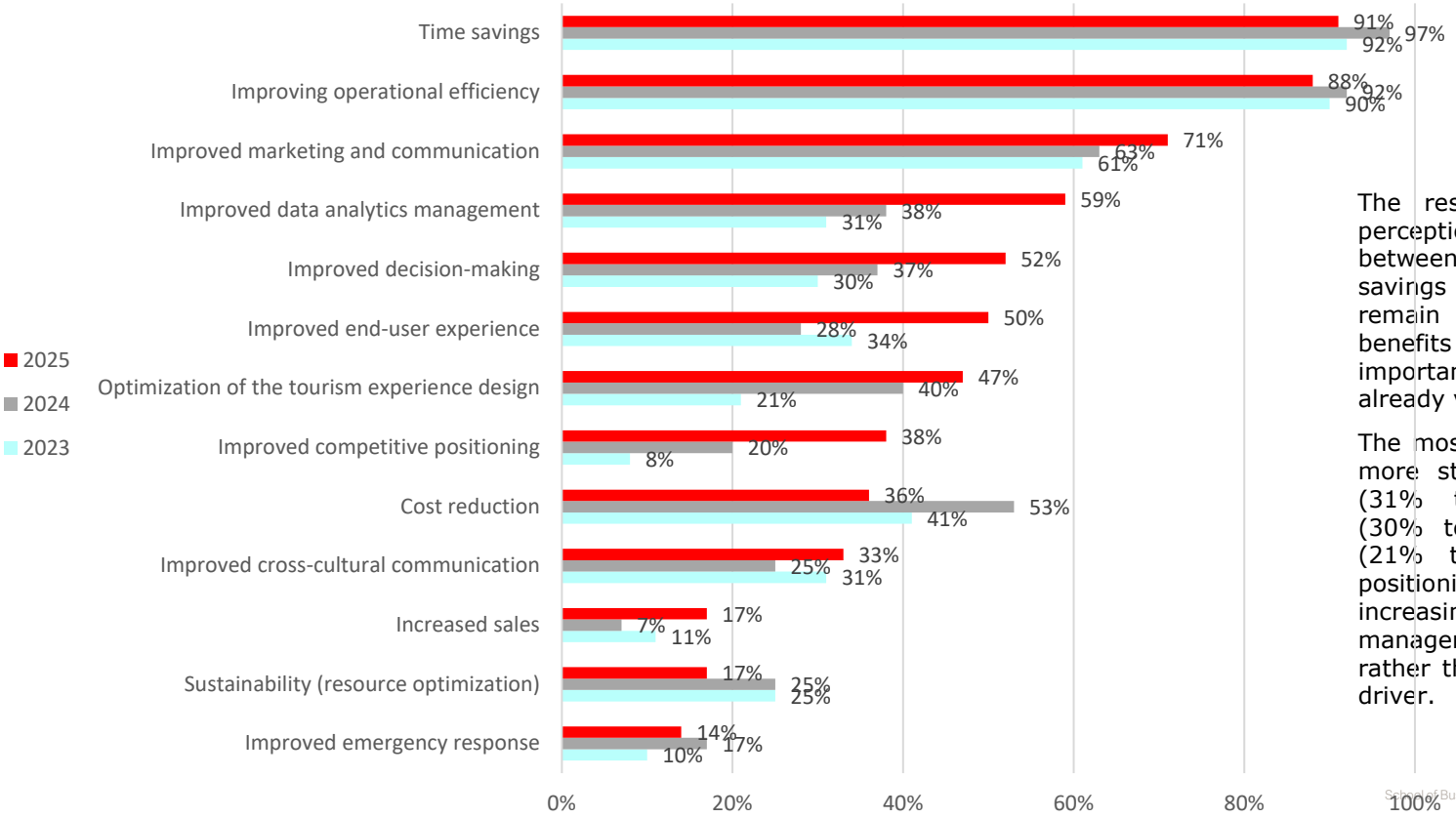
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Perceived benefits of AI
(overall sample, 4 countries)



The adoption of AI is primarily associated with concrete operational benefits. DMOs overwhelmingly highlight time savings (92%), improved operational efficiency (85%), as well as enhanced marketing and communication (71%) and data management (64%). The perceived benefits therefore mainly concern the optimization of internal processes and productivity. Conversely, more strategic or financial effects, such as increased revenue (18%) or contributions to sustainable development (17%), remain significantly less visible or more difficult to measure at this stage.

Perceived Benefits of AI in Switzerland
(Trends in Swiss DMOs, 2023–2025)

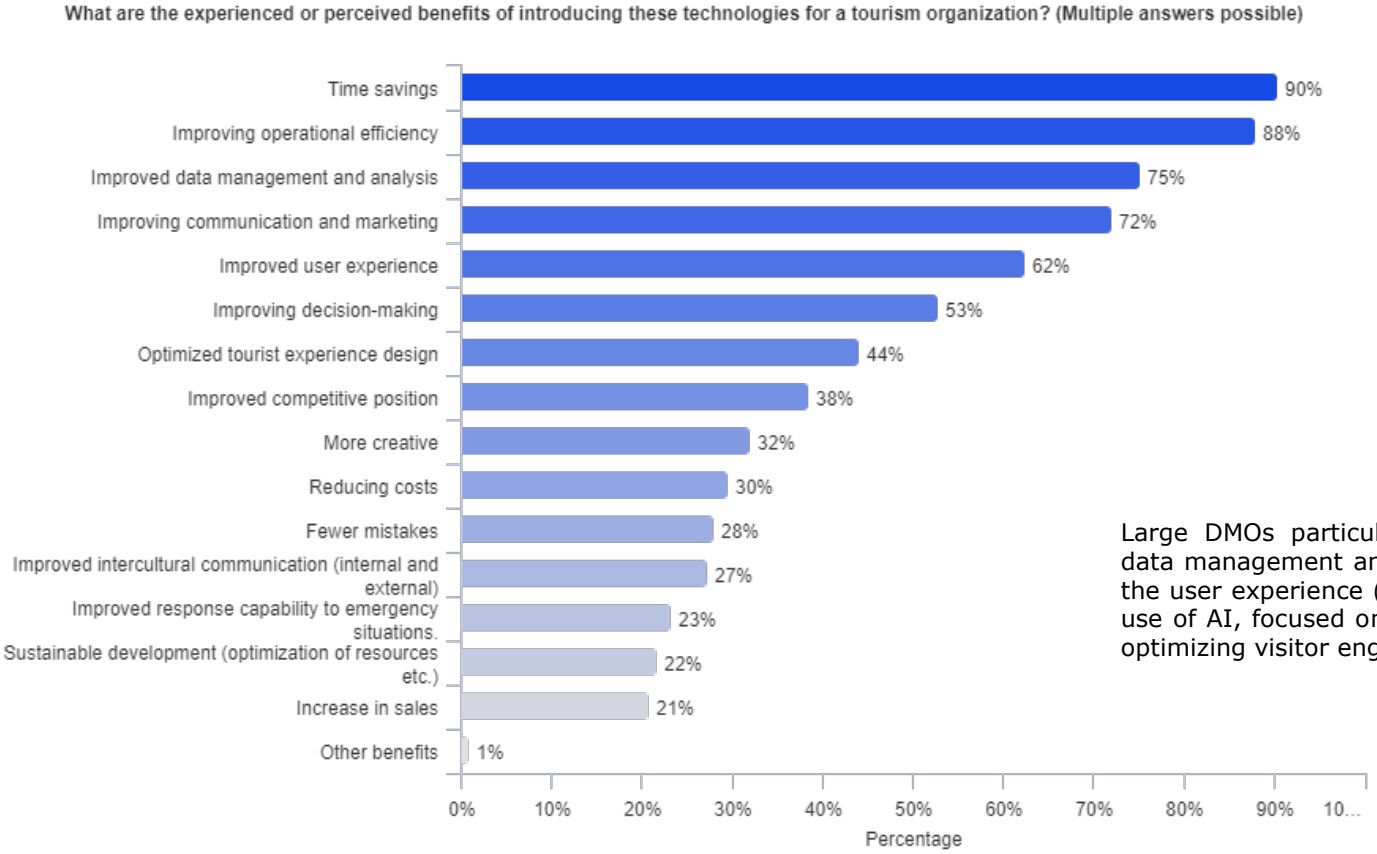


The results show a shift in the perception of AI among Swiss DMOs between 2023 and 2025. Time savings and operational efficiency remain the primary perceived benefits (nearly 90%), but their importance is stabilizing at an already very high level.

The most significant increases are in more strategic uses: data analysis (31% to 59%), decision-making (30% to 52%), tourist experience (21% to 47%), and competitive positioning (8% to 38%). AI is thus increasingly seen as a tool to support management and value creation, rather than merely as a productivity driver.

Perceived benefits of AI

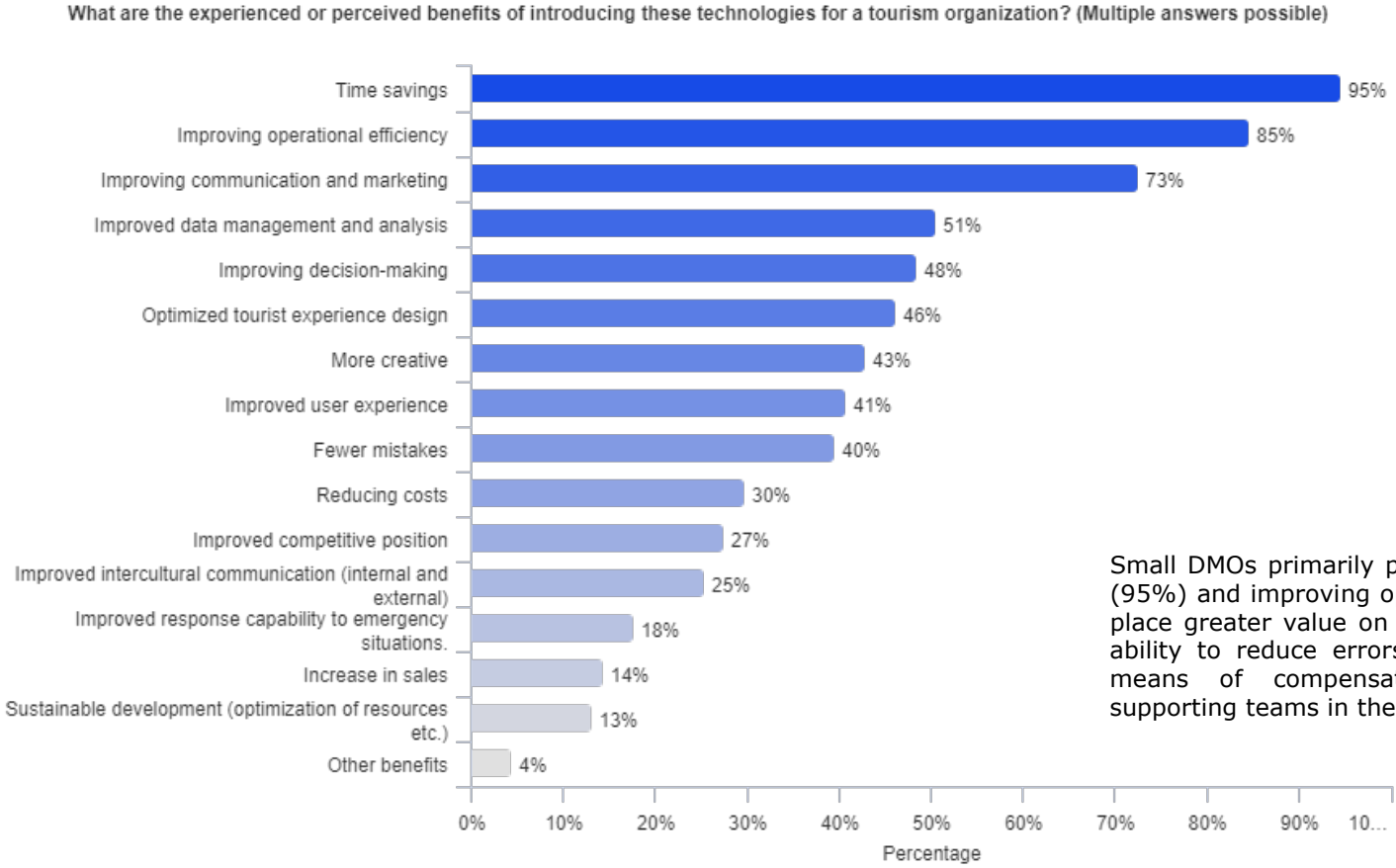
(overall sample, 4 countries, DMO > 500,000 overnight stays)



Large DMOs particularly highlight the benefits related to data management and analysis (75%) as well as improving the user experience (62%). This suggests a more advanced use of AI, focused on leveraging large volumes of data and optimizing visitor engagement on a large scale.

Perceived benefits of AI

(overall sample, 4 countries, DMO < 500,000 overnight stays)



Small DMOs primarily perceive AI as a tool for saving time (95%) and improving operational efficiency (85%), but also place greater value on its creative potential (43%) and its ability to reduce errors (40%). AI thus appears to be a means of compensating for limited resources and supporting teams in their daily activities.

Overall analysis: consensus on efficiency gains, with differing national priorities

In all four countries, the main benefits attributed to AI are clearly **time savings**, **improved operational efficiency**, **optimized marketing and communication**, and better **data management and analysis**. AI is therefore primarily seen as a tool for doing more with limited resources, while improving service quality and decision-making.

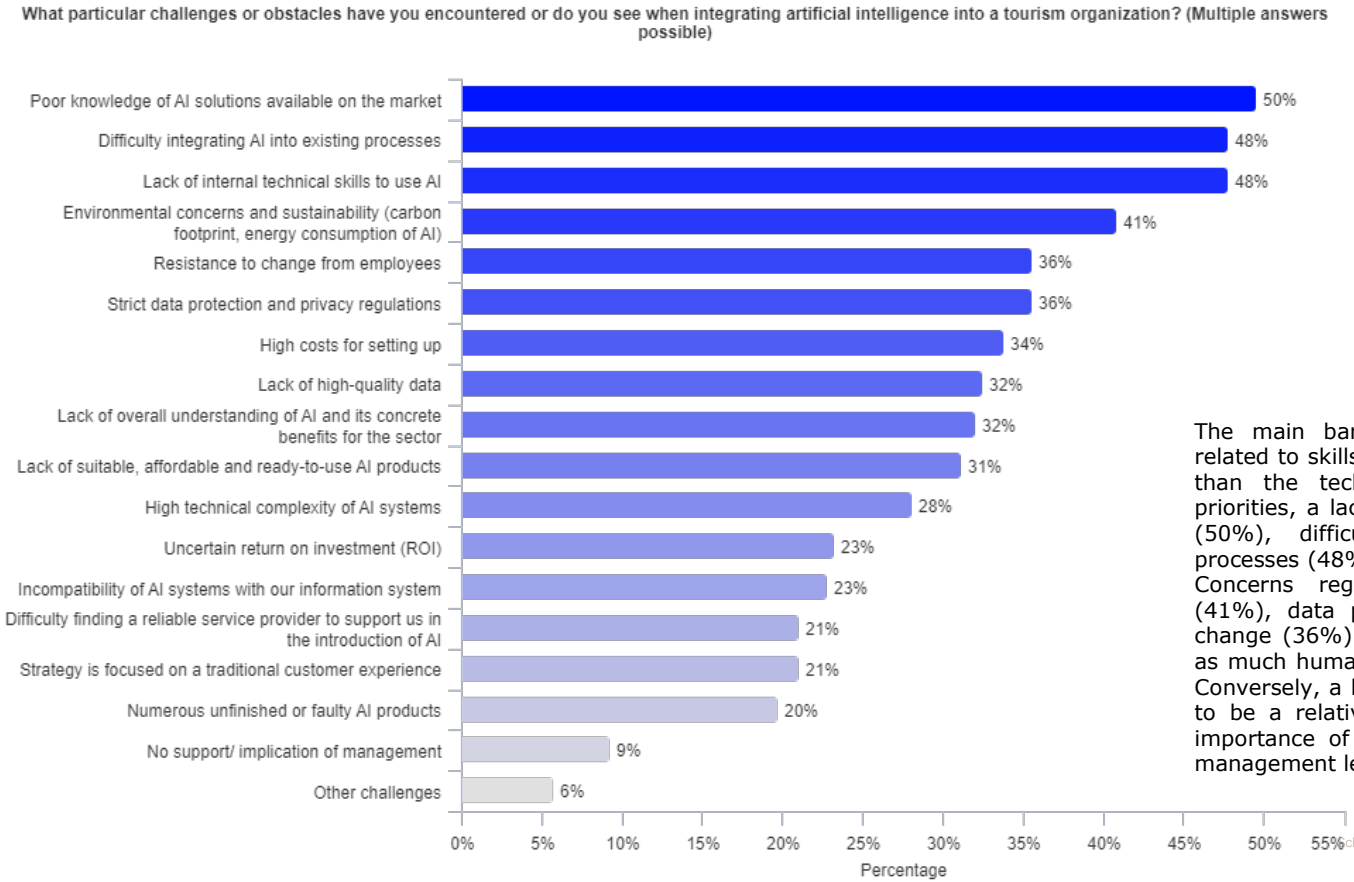
However, differences emerge in the benefits highlighted. **Switzerland** and **France** have very similar profiles, focused on productivity gains, operational efficiency, and marketing communication. **Austria** places greater emphasis on data management (82%), decision-making (58%), and error reduction (55%), reflecting a more analytical view of AI. **Canada**, although based on a smaller sample, stands out for its particularly strong perception of benefits related to operational efficiency (100%), time savings (100%), and user experience (76%).

Despite these nuances, the results point to the same conclusion: DMOs today view AI less as a tool for cost reduction or revenue growth and more as a **driver of efficiency, quality, and internal process improvement**. Strategic or financial benefits appear even more indirect and less tangible than immediate operational gains.

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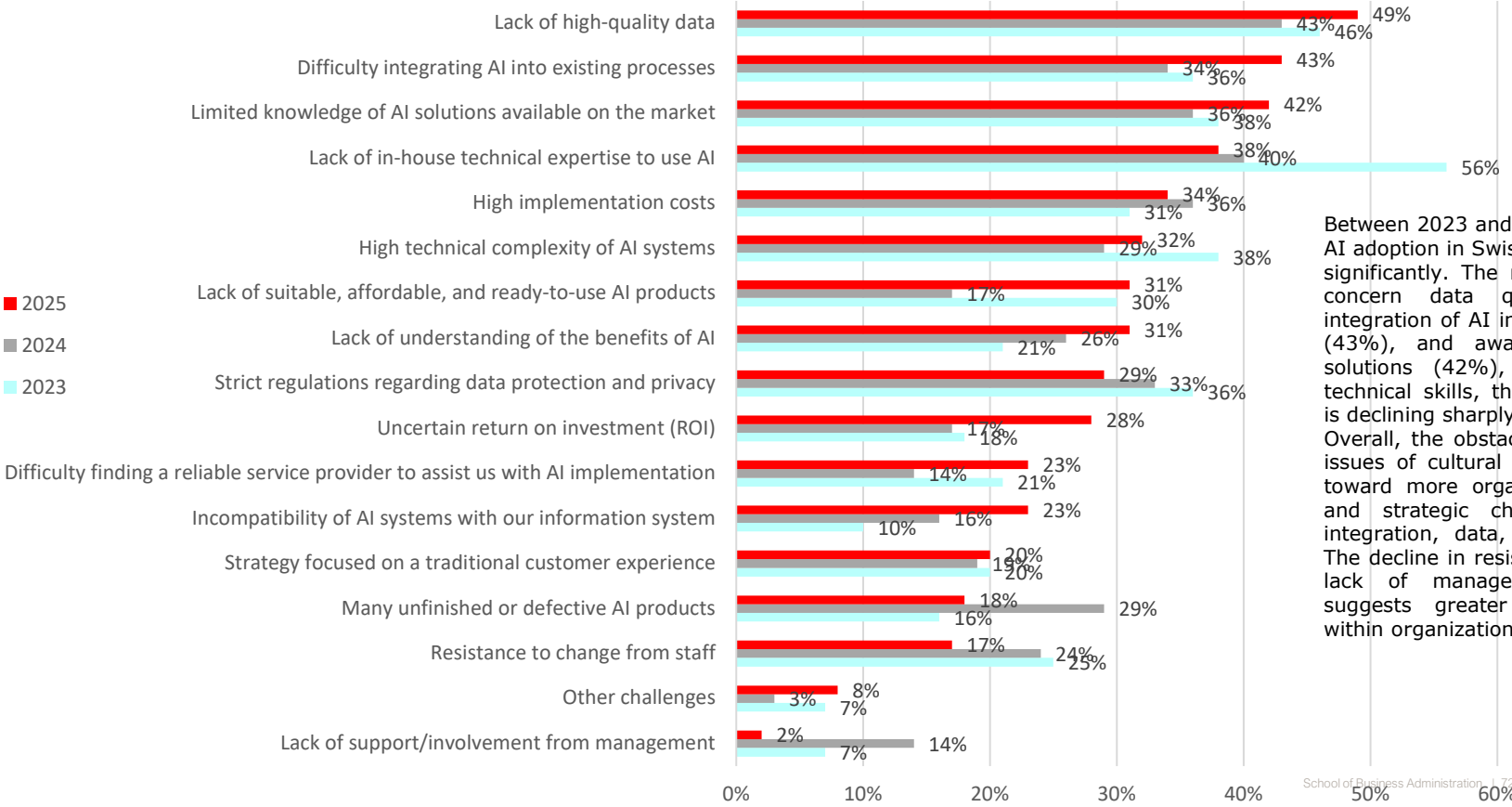
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Barriers and obstacles to the adoption of AI
(global sample, 4 countries)



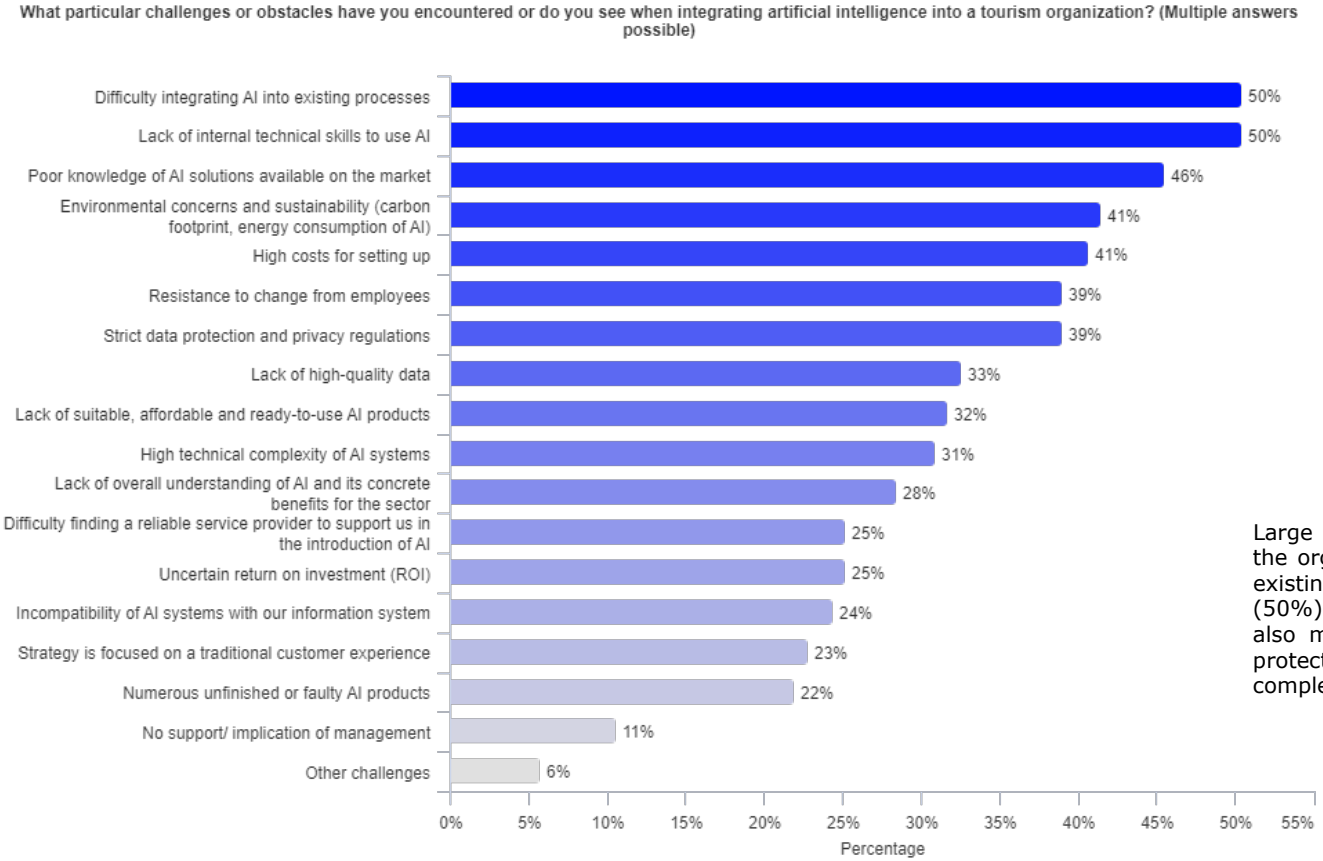
The main barriers to AI adoption are primarily related to skills and organizational integration rather than the technology itself. DMOs cite, as top priorities, a lack of awareness of available solutions (50%), difficulty integrating AI into existing processes (48%), and a lack of internal skills (48%). Concerns regarding environmental sustainability (41%), data protection (36%), and resistance to change (36%) also indicate that the challenges are as much human and strategic as they are technical. Conversely, a lack of executive buy-in (9%) appears to be a relatively minor obstacle, a sign that the importance of AI is now widely recognized at the management level.

Barriers and obstacles to the adoption of AI in Switzerland (Swiss DMOs trends, 2023–2025)



Between 2023 and 2025, the barriers to AI adoption in Swiss DMOs are changing significantly. The main challenges now concern data quality (49%), the integration of AI into existing processes (43%), and awareness of available solutions (42%), while the lack of technical skills, though still significant, is declining sharply (from 56% to 38%). Overall, the obstacles are shifting from issues of cultural adaptation and skills toward more organizational, technical, and strategic challenges related to integration, data, and value creation. The decline in resistance to change and lack of management support also suggests greater acceptance of AI within organizations.

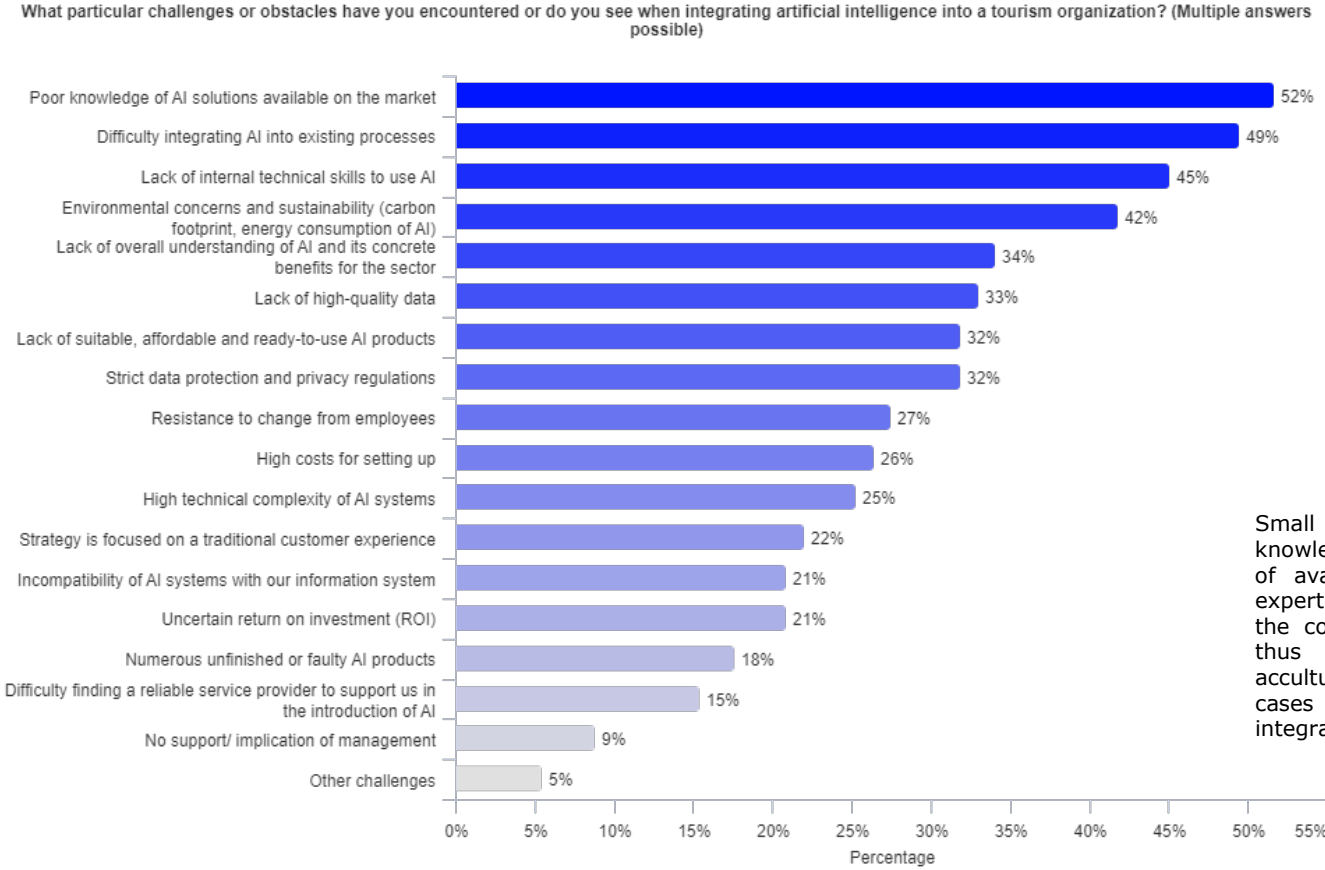
Barriers and obstacles to the adoption of AI
(global sample, 4 countries, DMO > 500,000 overnight stays)



Large DMOs primarily identify challenges related to the organizational integration of AI: integration into existing processes (50%), lack of internal expertise (50%), and implementation costs (41%). They are also more sensitive to issues of governance, data protection, and resistance to change, reflecting more complex organizational environments.

Barriers and obstacles to the adoption of AI

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



Small DMOs face greater challenges in terms of knowledge gaps and support, with limited awareness of available solutions (52%), a lack of internal expertise (45%), and a still-limited understanding of the concrete benefits of AI (34%). The obstacles thus appear to be more closely linked to acculturation and the identification of relevant use cases than to the management of complex integration projects.

Analysis of Open Comments – Other Challenges Related to AI (I)

The open-ended responses highlight challenges that go beyond the purely technical and financial aspects already identified in the survey.

1. **The very rapid pace of technological change**: The most frequently mentioned issue concerns the speed at which tools and practices evolve. Several respondents emphasize that knowledge quickly becomes obsolete, requiring constant monitoring of technological developments and continuous adaptation of skills. This acceleration creates a sense of uncertainty regarding the technological choices to be made.
2. **Lack of time and knowledge**: Some DMOs mention a lack of time to experiment, test, and integrate new tools. The lack of internal knowledge ("Wissen fehlt") also remains an obstacle, despite interest in the technology.
3. **Organizational challenges of integration**: Several comments mention difficulties related to internal organization, the time required to integrate AI into existing processes, and the adaptation of job roles. The challenge is not only technological but also organizational and human.
4. **Preserving the human dimension**: One respondent highlights the tension between the "real" and the "artificial" and emphasizes the importance of human contact in tourism activities. This concern reflects a broader question about the role of humans in a sector based on hospitality, authenticity, and relationships.

Analysis of Open Comments – Other Challenges Related to AI (II)

5. **Building a sustainable AI ecosystem:** Finally, some stakeholders are wondering how to develop a coherent, reliable, and sustainable AI ecosystem at the destination level, while addressing issues of data protection, technological dependence, and licensing costs.

Key Message

Beyond technical challenges, the comments show that the main concerns relate to the speed of change, upskilling, organizational integration, and preserving the human dimension of tourism.

Final Anaylsis – Barriers and Obstacles to AI Adoption

The results show that the main obstacles to AI adoption are primarily related **to skills, organizational integration, and technological uncertainty**. Across the four countries, respondents most frequently cite the difficulty of integrating AI into existing processes, a lack of internal skills, unfamiliarity with available solutions, and concerns regarding data quality. Cost, data protection, and sustainability issues also constitute significant barriers.

Notable differences emerge, however, between the countries. **Austria** stands out for its strong concerns regarding operational integration, regulatory constraints, and implementation costs, which likely reflects an already advanced level of adoption where challenges are becoming more organizational in nature. **Canada** places greater emphasis on change management, environmental concerns, a skills gap, and the difficulty of finding reliable partners to support the transformation. **France** is characterized above all by a lack of knowledge about the market and available solutions, as well as a need for cultural adaptation and an understanding of the concrete benefits of AI. Finally, **Switzerland** stands out for its particularly strong concern regarding data quality, while sharing with the other countries the challenges related to integration, skills, and costs.

Overall, the results suggest that the **main challenge** is no longer to convince stakeholders of the value of AI, but to **provide DMOs with the skills, data, resources, and support** needed to move from experimentation to sustainable and effective integration.

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AI has become an operational reality for DMOs

The study shows that **artificial intelligence** is now **widely integrated** into destination management organizations. In the four countries studied, the vast majority of DMOs already use AI tools and **consider their impact to be significant**, even transformative. This evolution has been particularly rapid over the past two years, confirming that AI has moved from being an emerging technology to a professional tool used on a daily basis.

However, **current adoption remains primarily focused on the most accessible applications**: content generation, translation, image creation, and communication support. AI is therefore primarily used today as a **productivity tool** that allows teams to save time and improve their efficiency. **More advanced applications** related to forecasting, personalization, automation, or destination management remain **relatively limited**.

The adoption of foundational AI tools is now well established across many organizations. However, the **integration of AI into business processes, decision-making structures, and strategic activities remains at a relatively early stage of development**.

A maturity gap is emerging among DMOs

The study highlights significant differences between countries and, above all, between large and small destinations. **Large DMOs** generally have more resources, expertise, and data, which allows them to experiment with more advanced uses of AI, particularly in **data analysis, traffic management, personalization of the experience, and visibility strategies** in search engines and AI assistants.

Conversely, **smaller organizations** use AI more as a **tool for assistance and to compensate for limited resources**. They primarily seek to save time, improve productivity, and support content creation. For these organizations, the main challenges involve identifying relevant use cases, accessing expertise, and a lack of support.

This situation raises the **risk of a digital divide** among destinations. DMOs capable of investing in data, skills, and innovation could strengthen their competitive advantage, while organizations with fewer resources risk remaining limited to more superficial uses of AI.

The next challenge: moving from AI tools to AI strategy

The main takeaway from the study is that the question is no longer whether DMOs should adopt AI, **but how they can derive sustainable value from it**. The identified barriers are no longer primarily technological: they primarily concern **skills, integration into existing processes, data governance, change management**, and the ability to measure the concrete benefits of projects.

At the same time, a new **strategic challenge is emerging**: the **visibility of destinations in AI-driven environments**. Respondents' comments reveal a growing awareness of the role of structured data, GEO (Generative Engine Optimization), content quality, and discoverability within large language models. DMOs will need to gradually expand their traditional marketing and coordination roles to include digital visibility management and data governance at the destination level.

Ultimately, the organizations that are most successful will likely be those that view AI not merely as a productivity tool, but as a **lever for organizational transformation, data valorization, and the strengthening of their role as coordinators, knowledge brokers, and data-driven shapers of tourism development**.

-> **Final Key Message**: AI is now widely adopted by DMOs, but its transformative potential remains largely untapped. Although AI tools will continue to evolve rapidly, the main challenge for destinations will be less technological than organizational: developing the necessary skills, structuring data, and implementing the strategies required to integrate AI sustainably into their operations and digital visibility.

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Resilient Tourism Flagship

Flagship supported by

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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

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)?

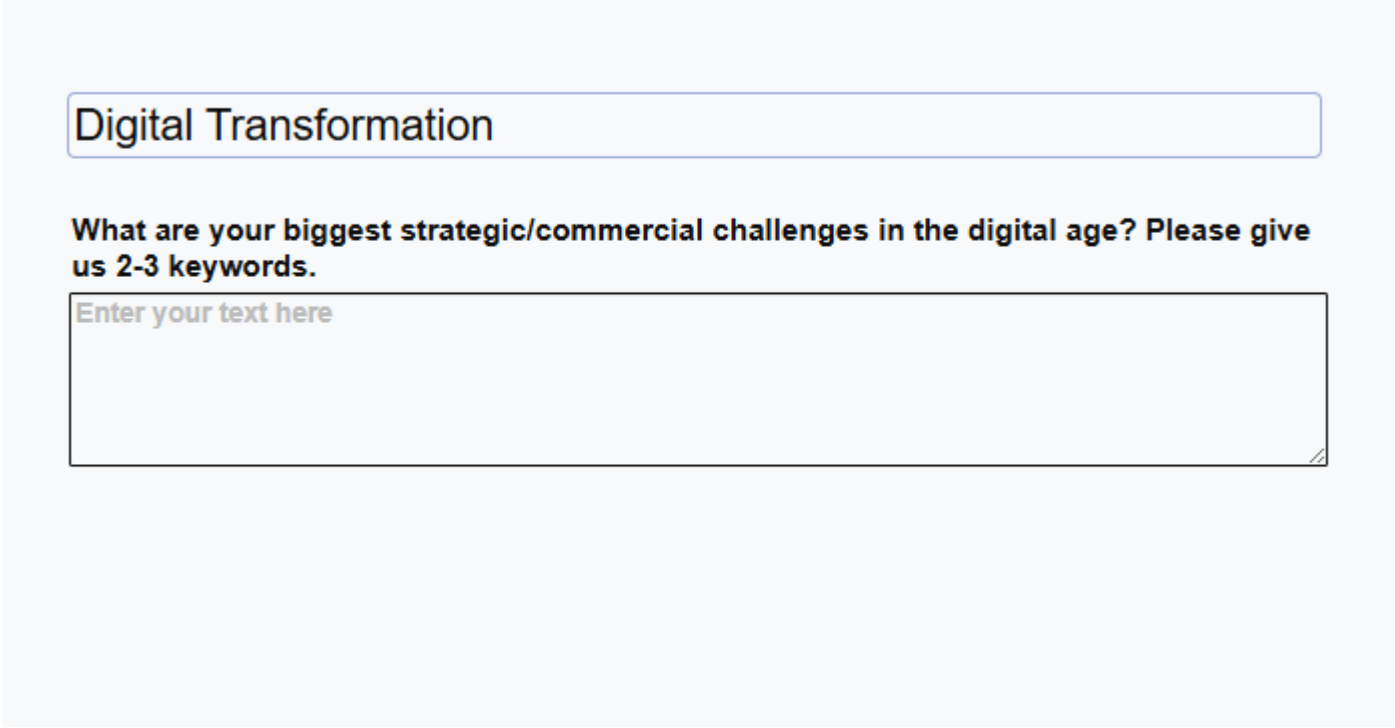
_____ %

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	○	○	○

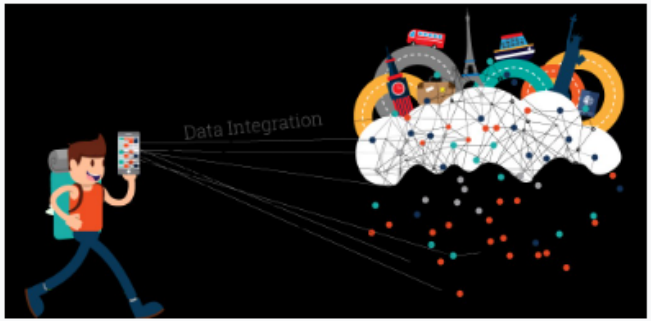
Questionnaire

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

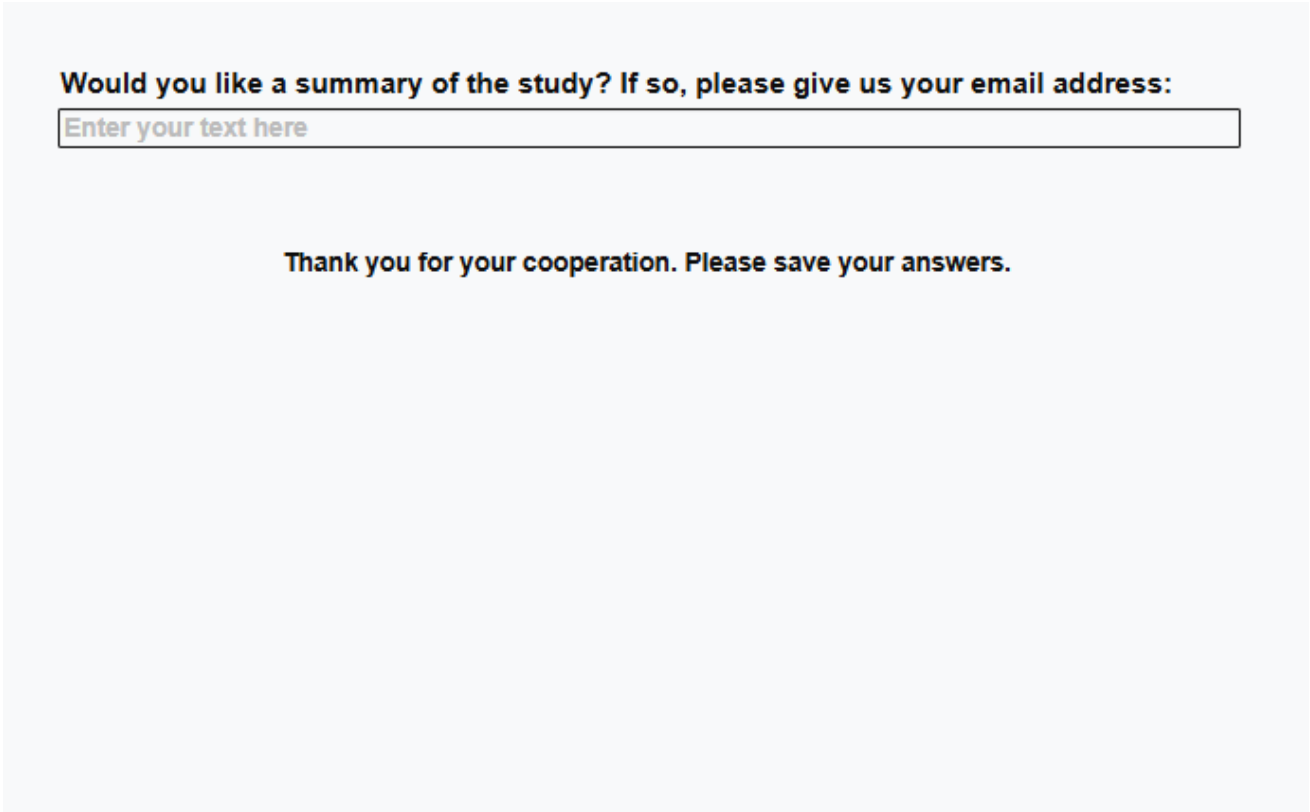
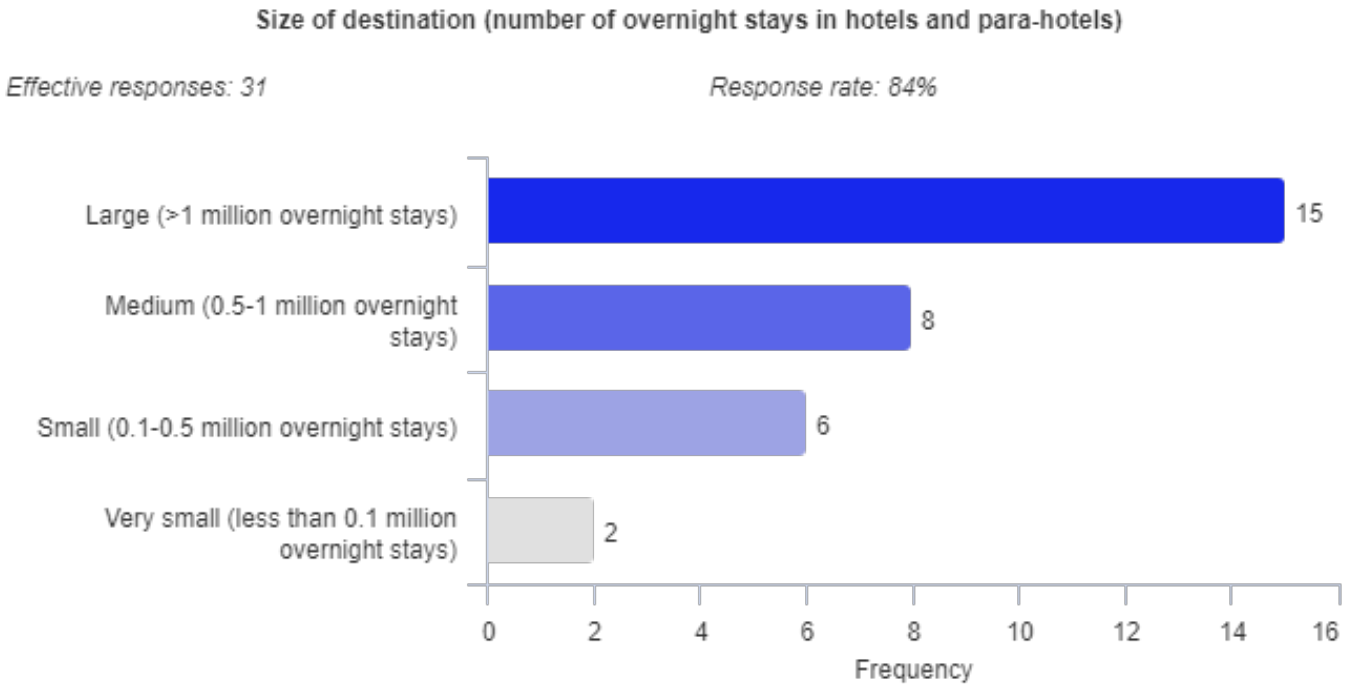


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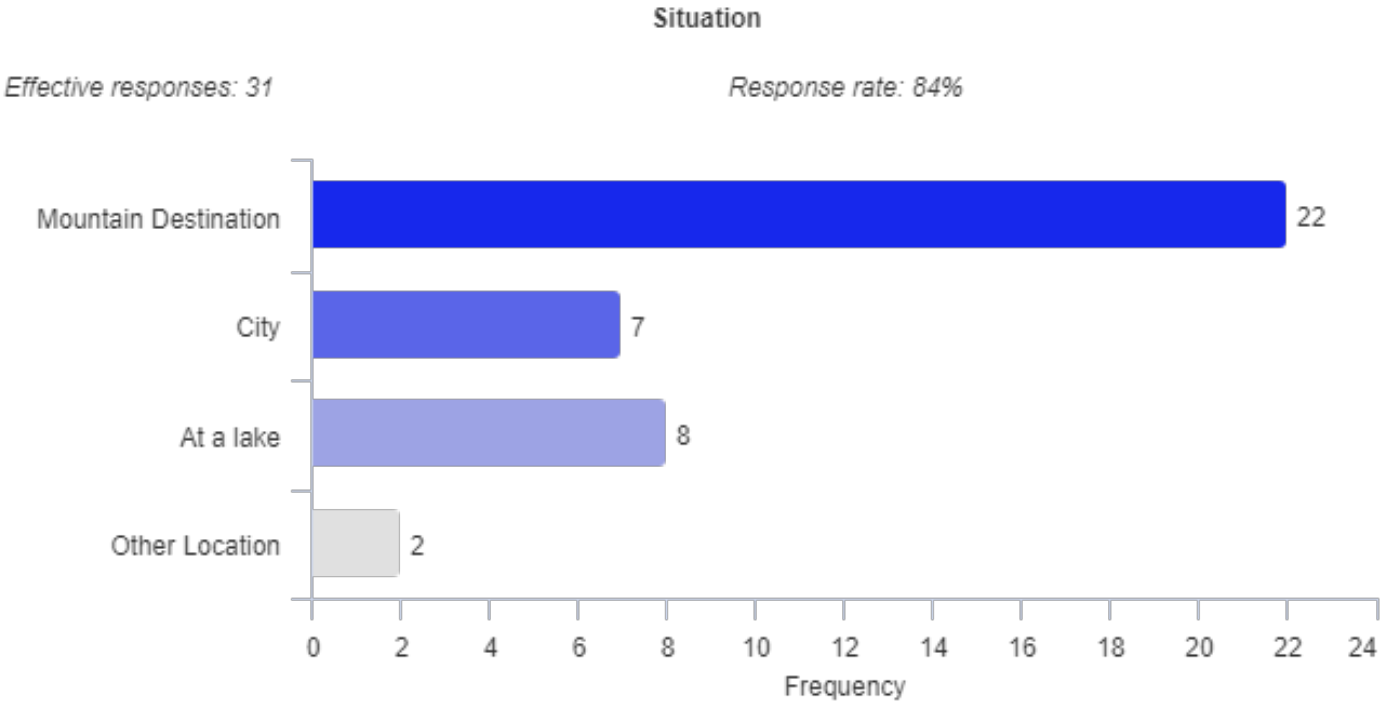
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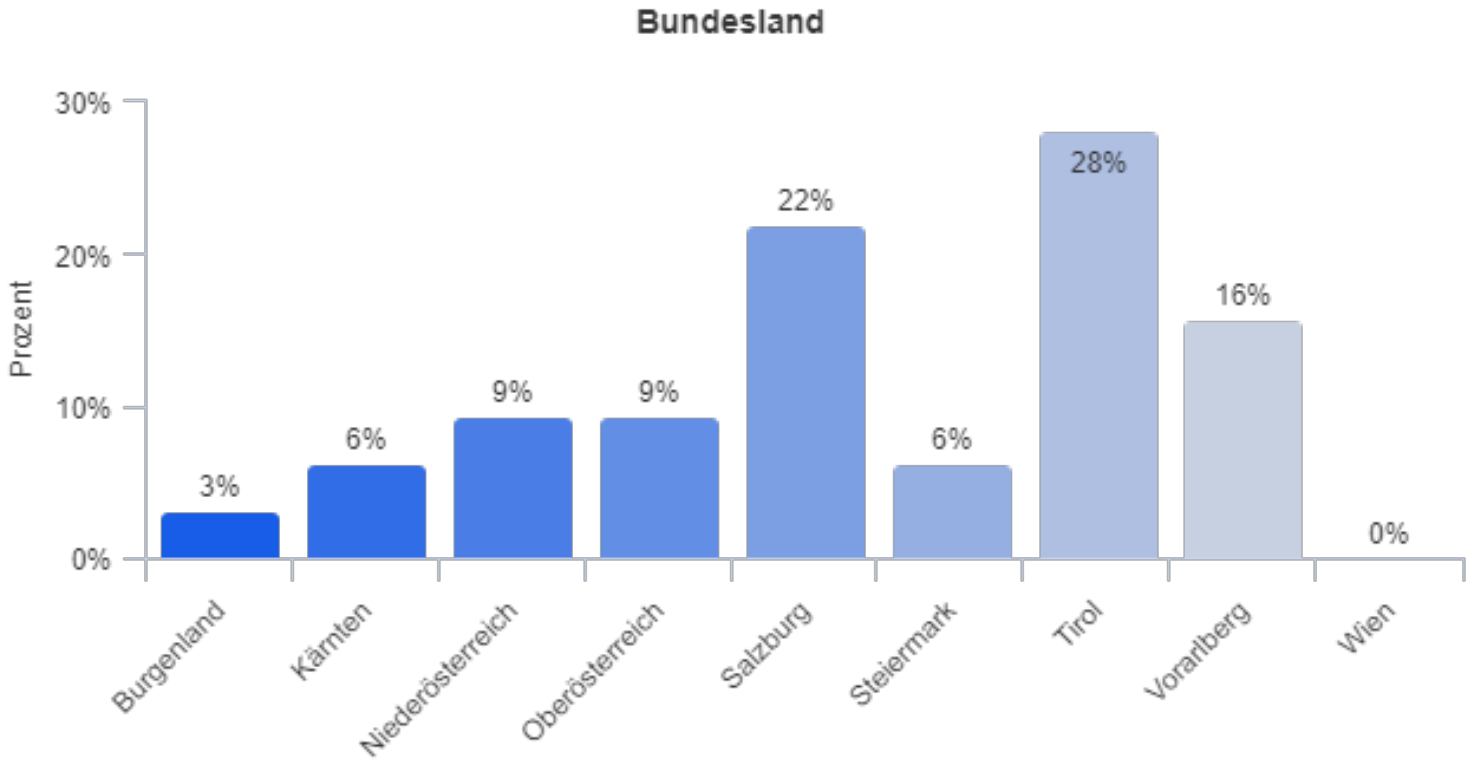
Austrian Sample: DMO Size



Case Study: Austria – DMO Situation

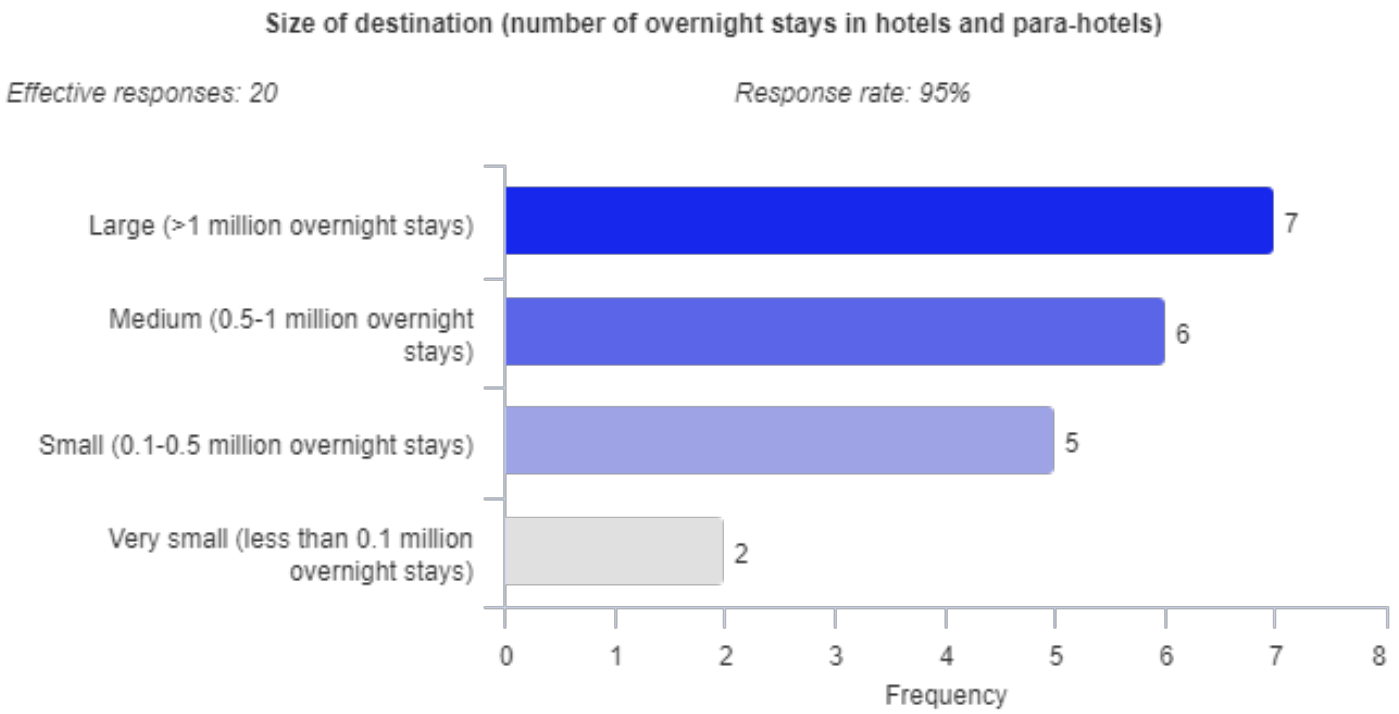


Sample Austria: Regions

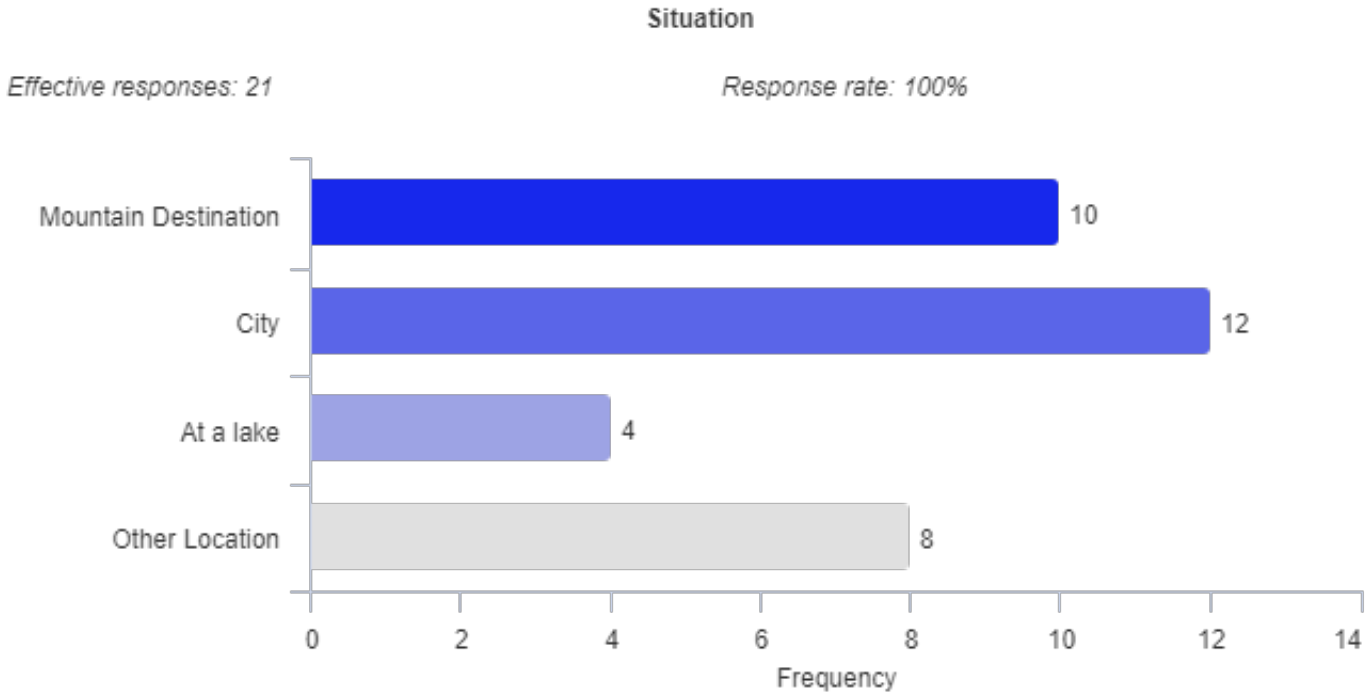




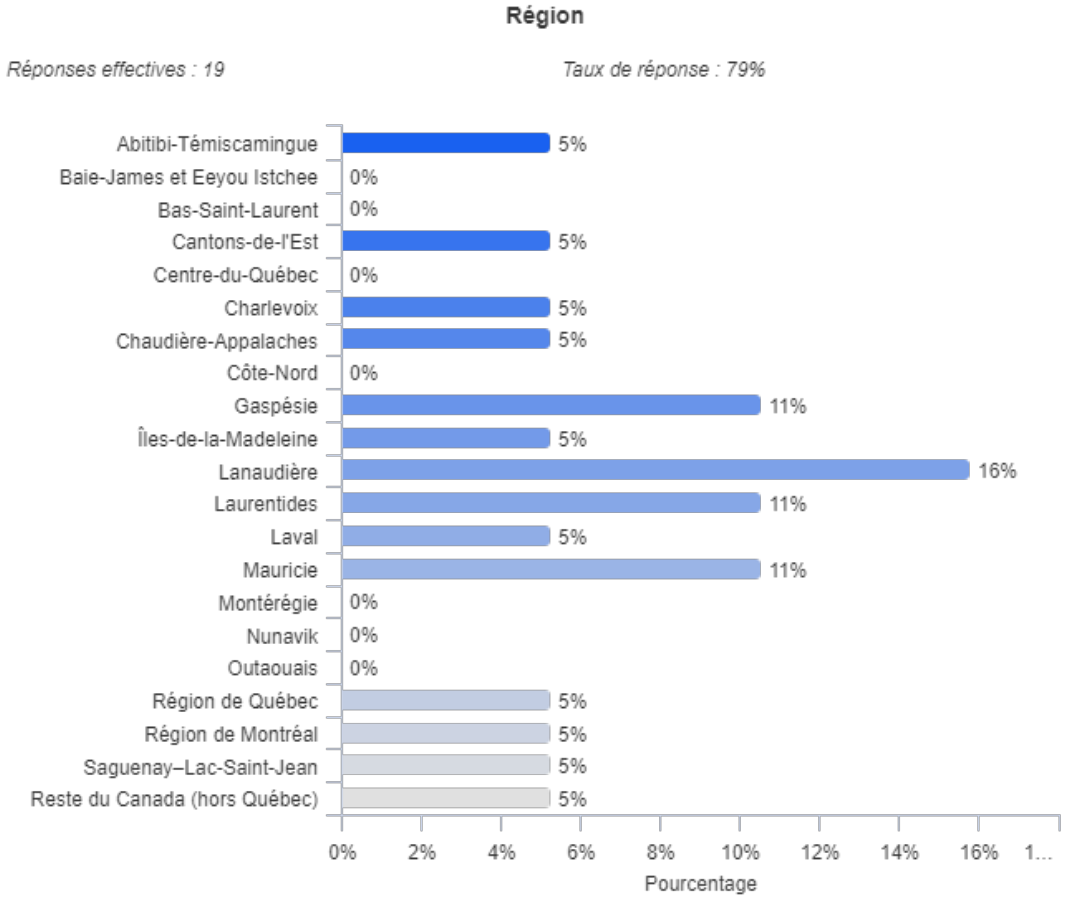
Canada Sample: DMO Size



Canada Sample: DMO Situation

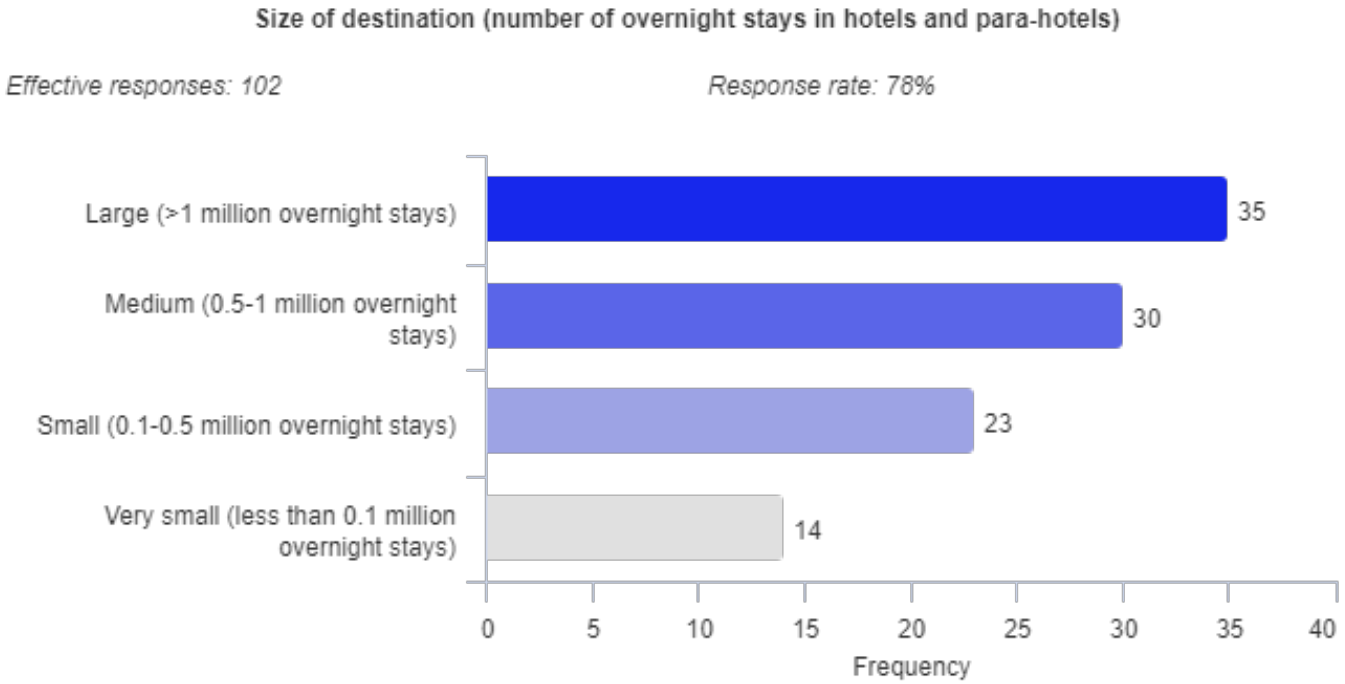


Sample Canada: Regions

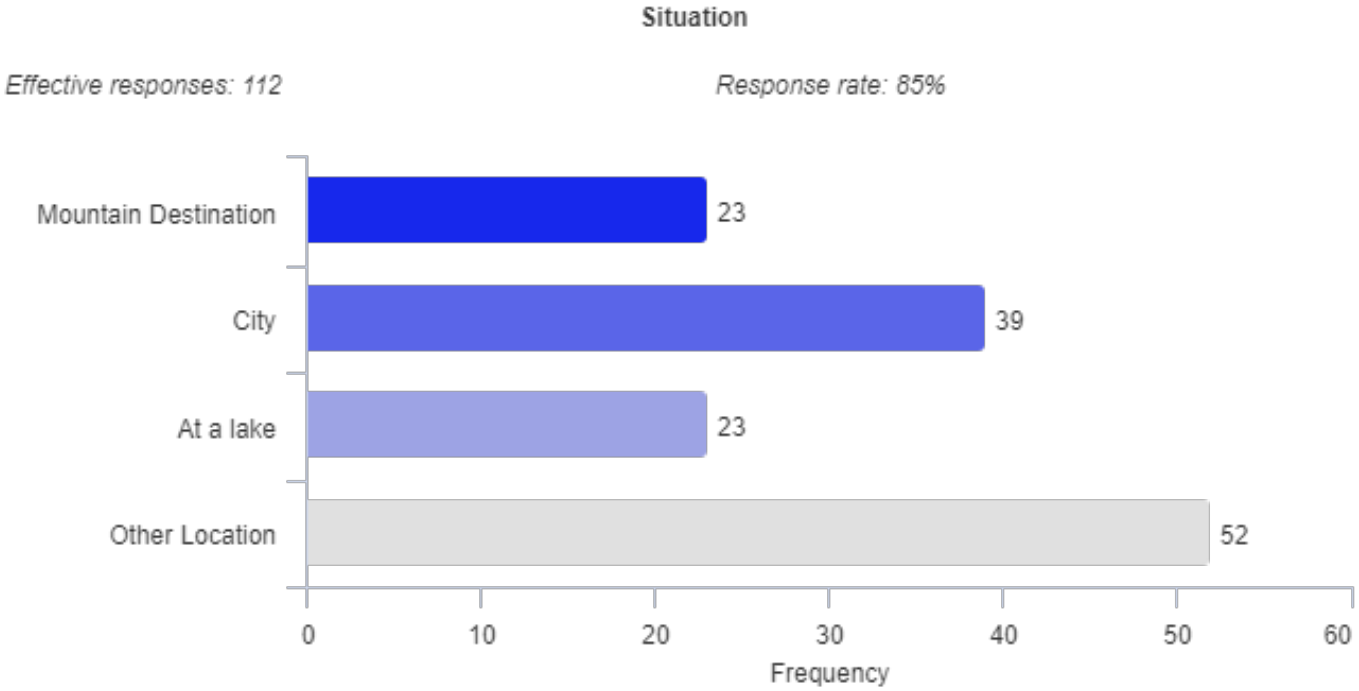




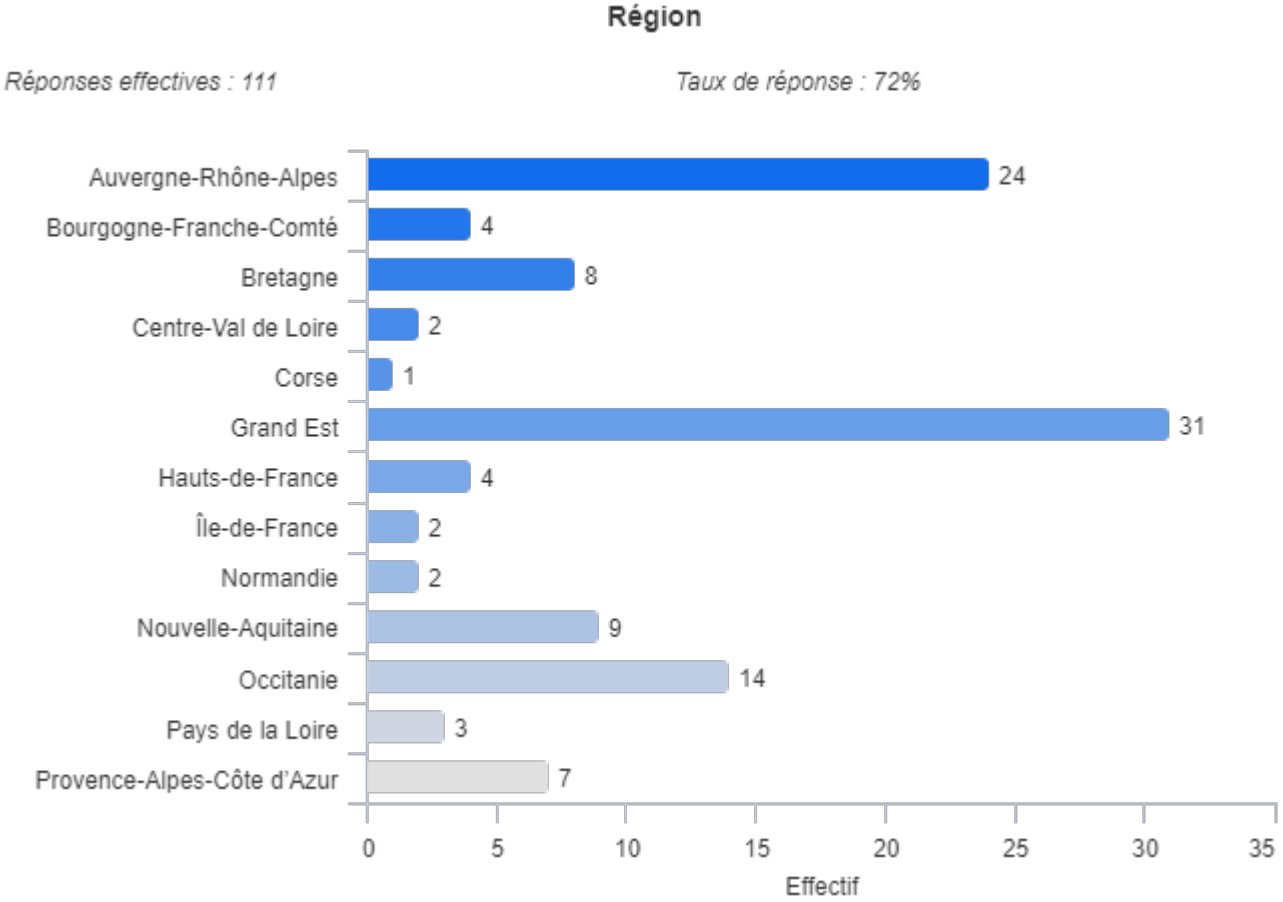
France Sample: DMO Size



France Sample: DMO Situation

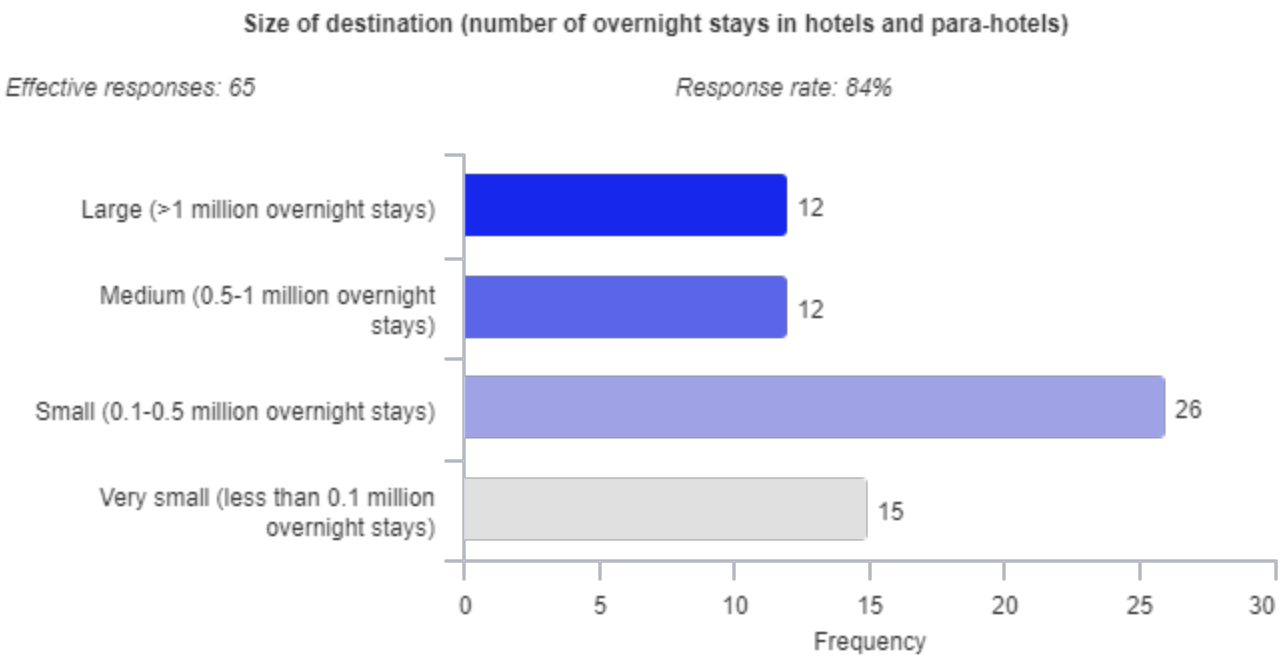


Sample France: Regions

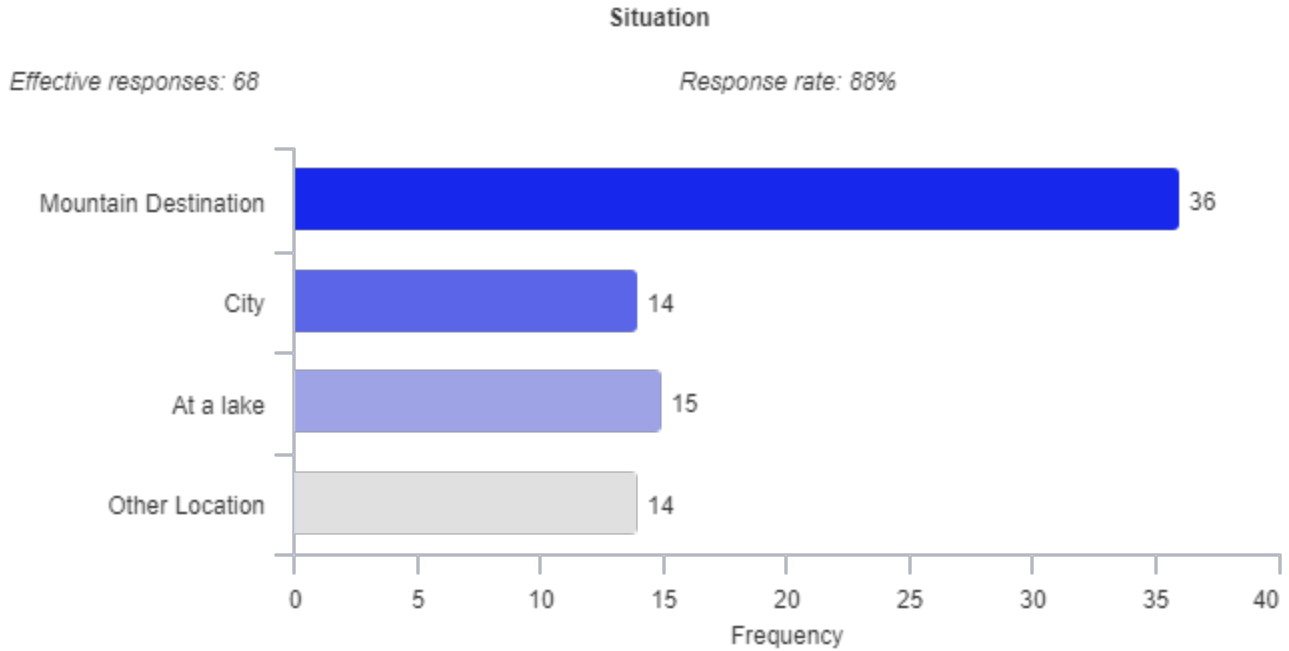




Swiss Sample: DMO Size



Swiss Sample: DMO Situation



Swiss Sample: Cantons

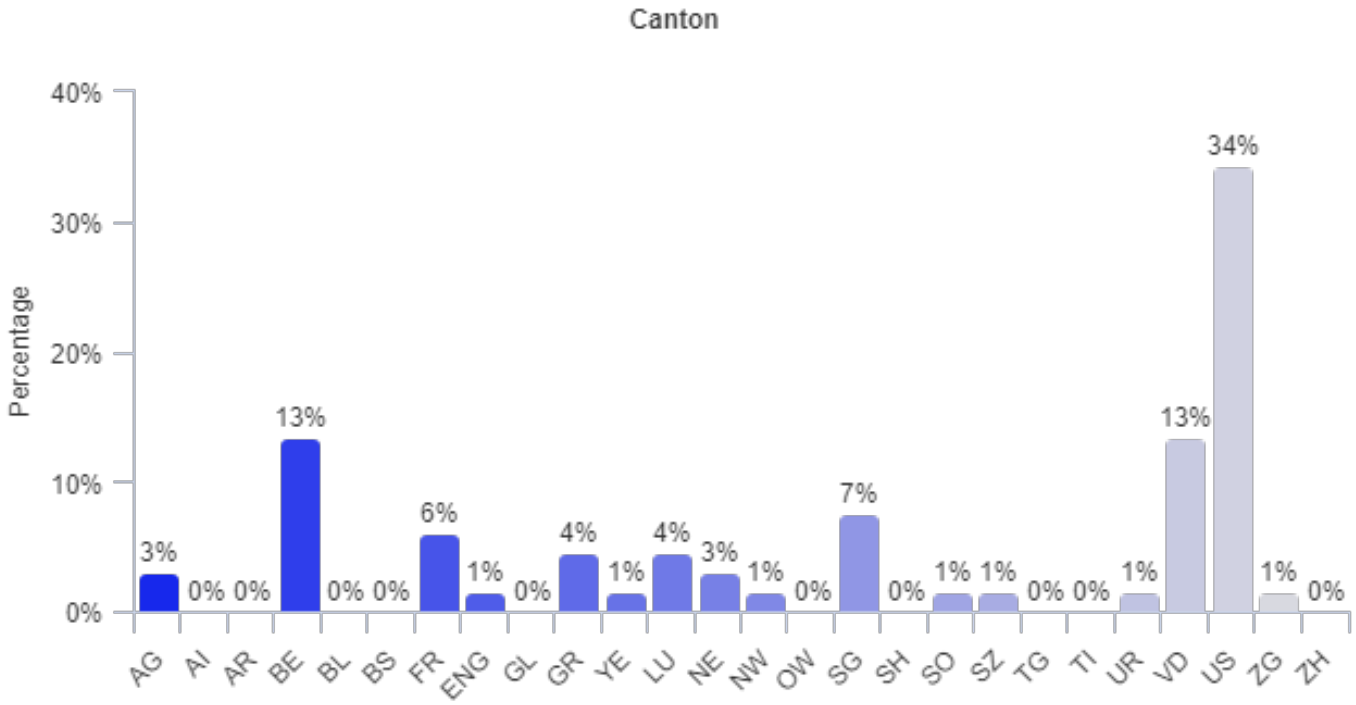
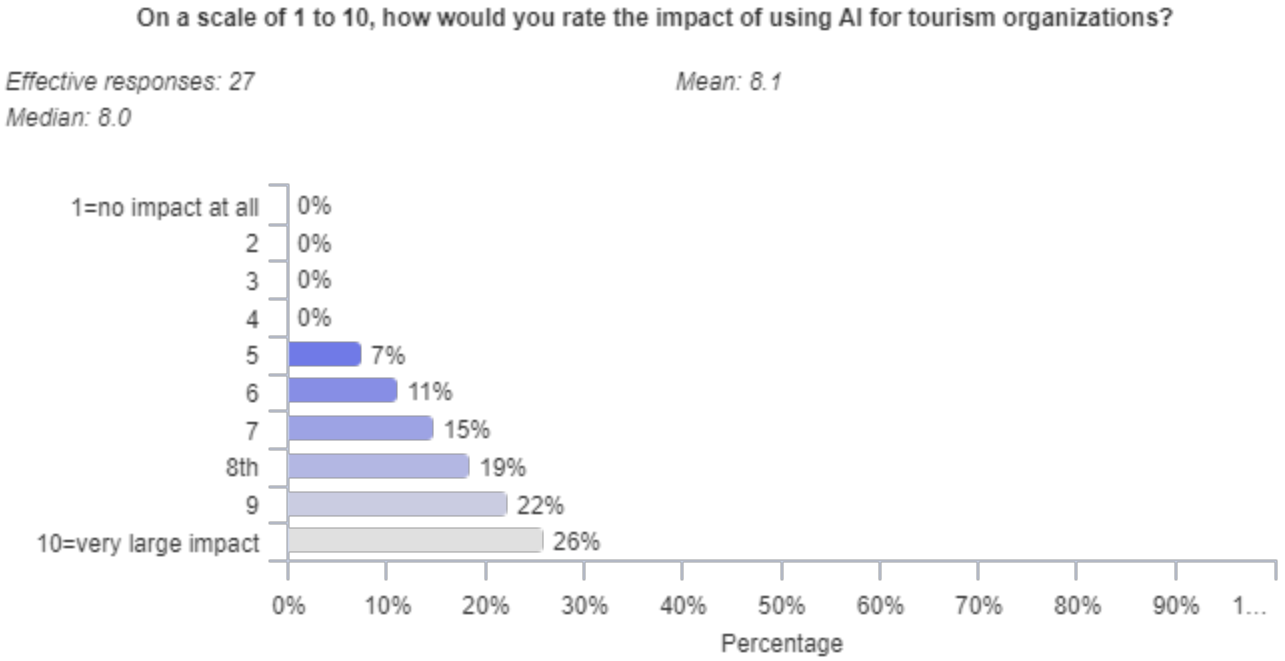


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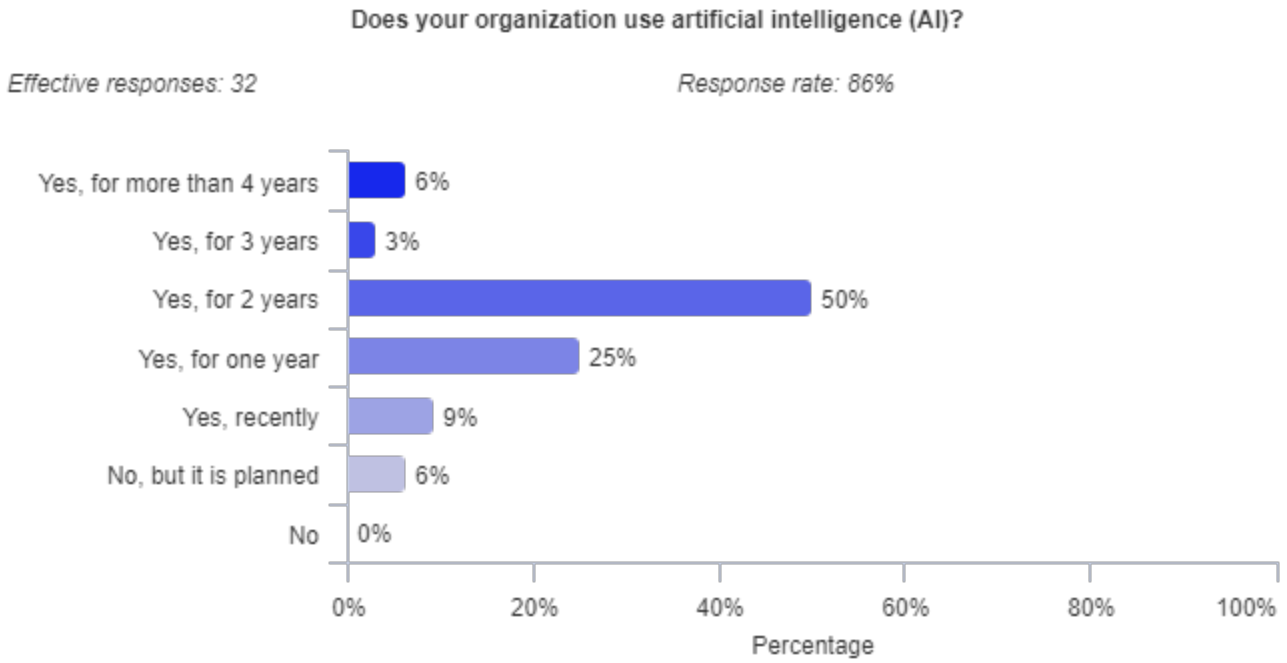
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2. Study Context
3. Method
4. Perception of the Impact of Artificial Intelligence
5. Level of AI Adoption in DMOs
6. Perceived usefulness of AI for DMOs
7. AI technologies used or considered
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10. Barriers and obstacles to AI adoption
11. Discussion and conclusions
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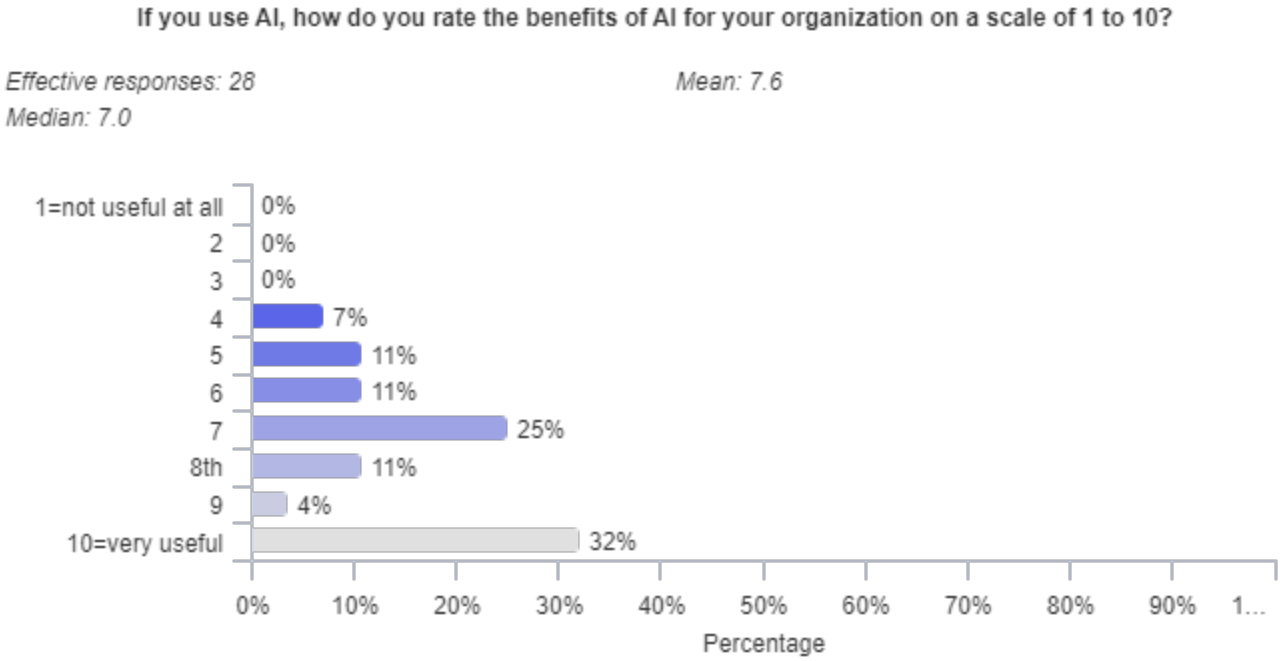
Austria: Perceptions of the Impact of Artificial Intelligence



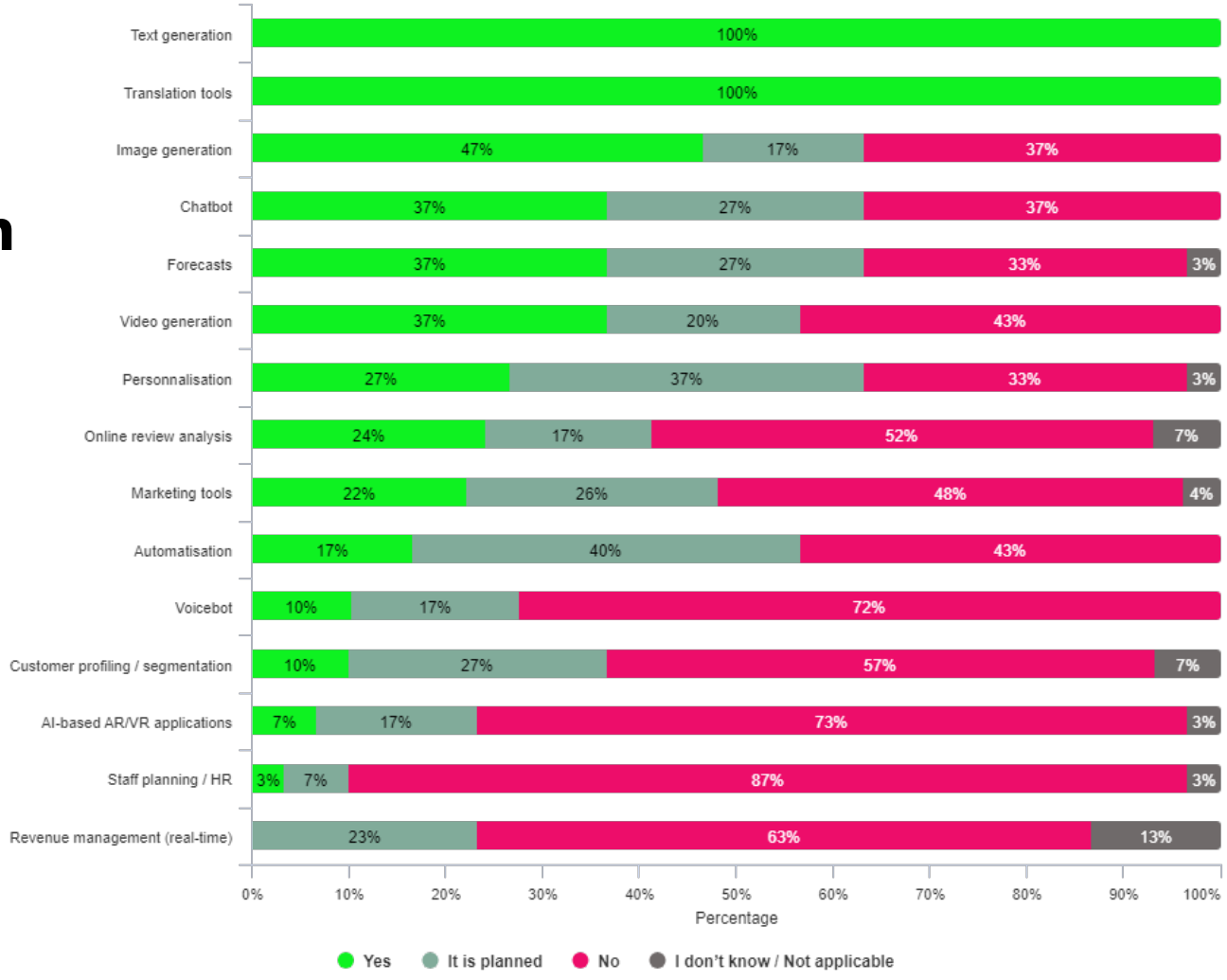
Austria: The Use of AI in DMOs



Austria: Perceived Value of AI for DMOs

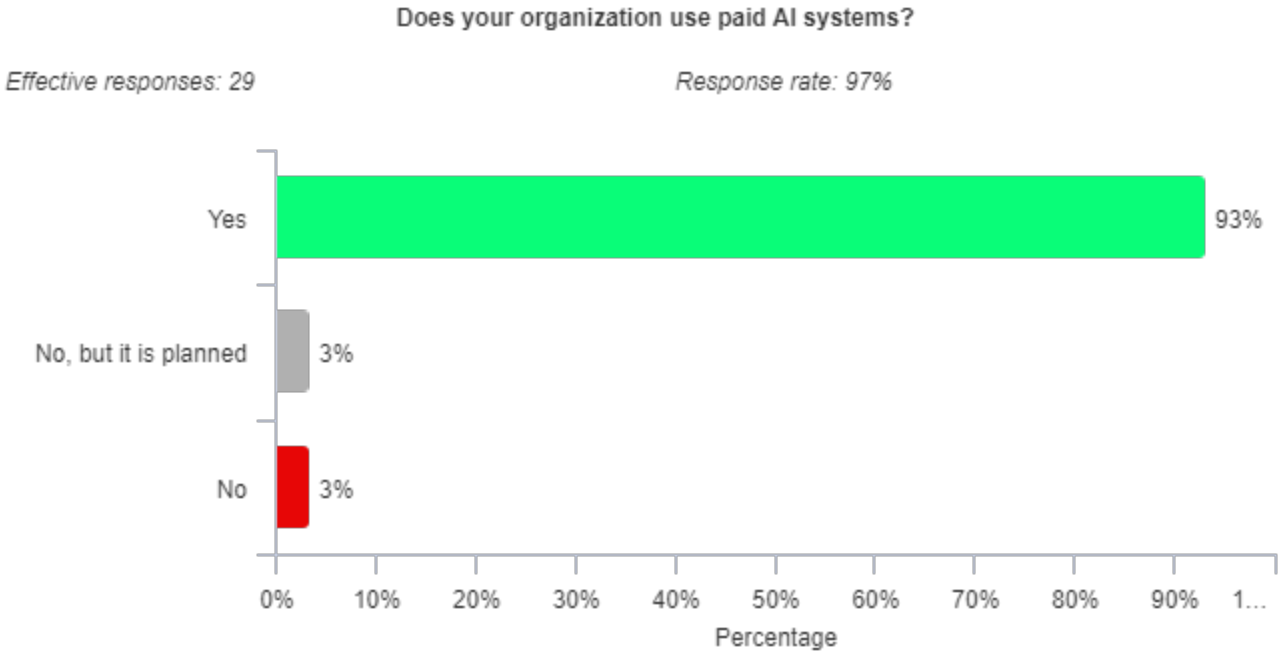


Austria: AI technologies currently in use or under consideration

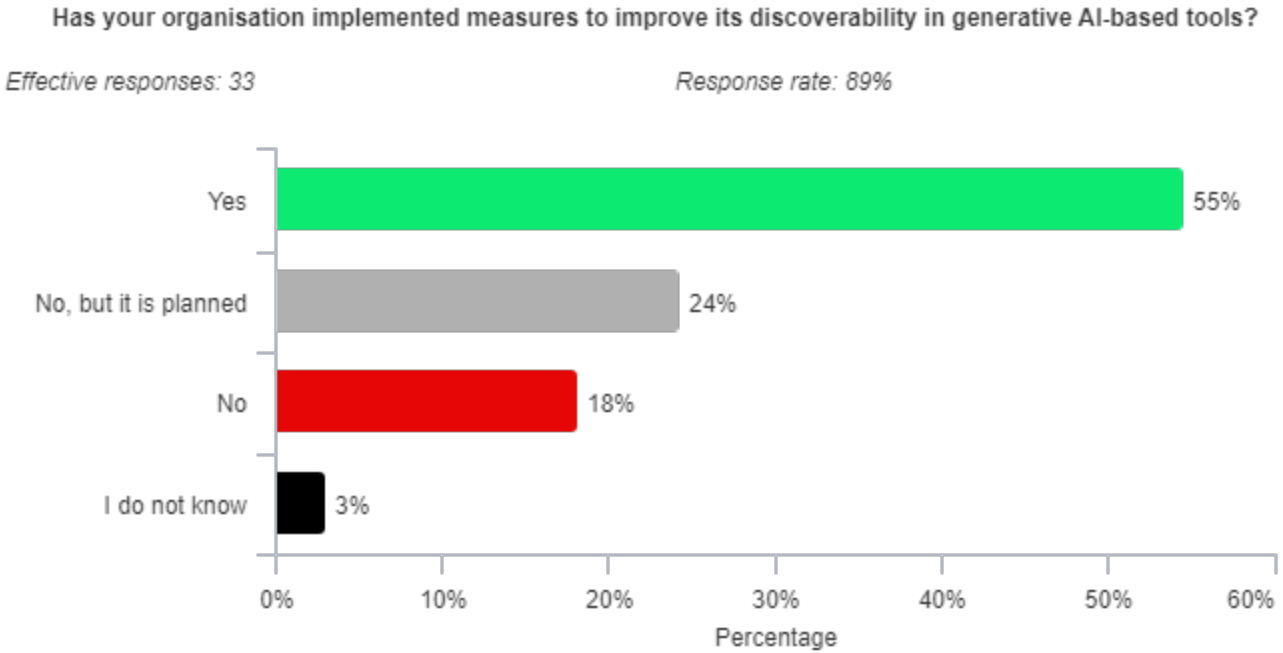


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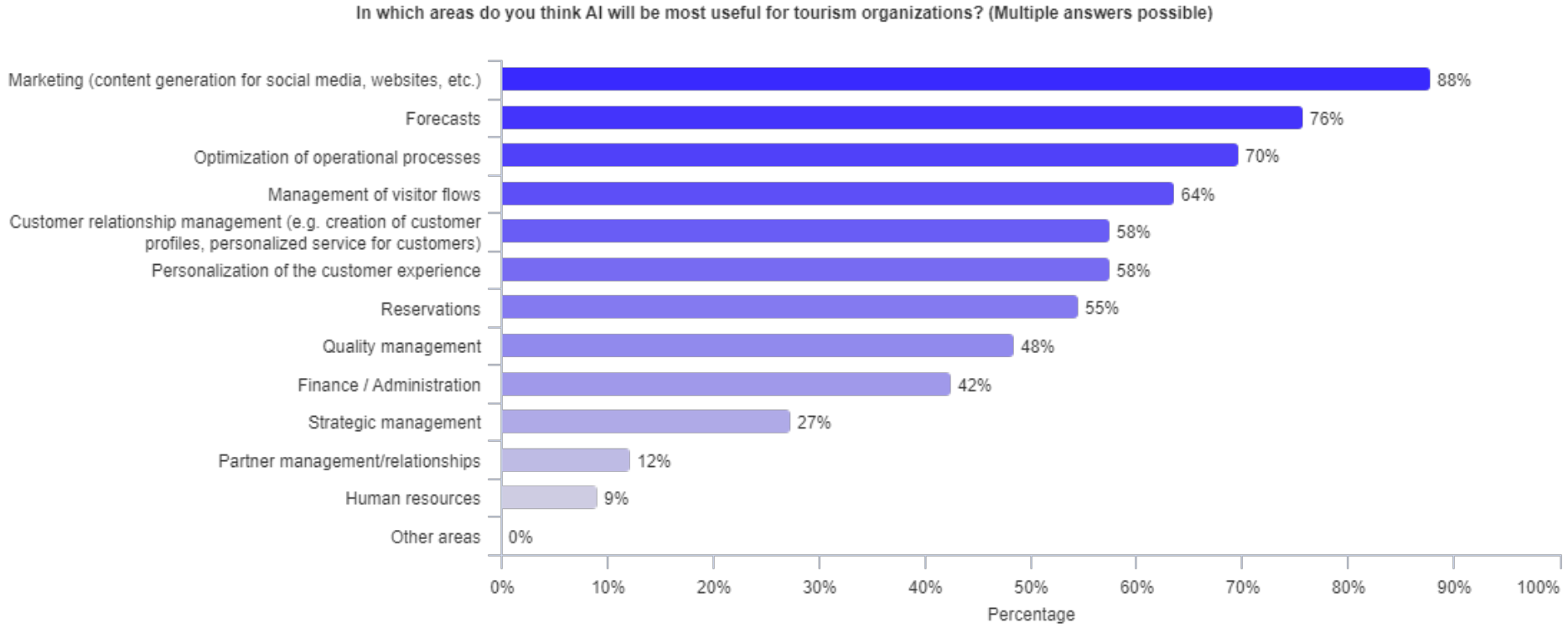
Austria: Paid AI tools



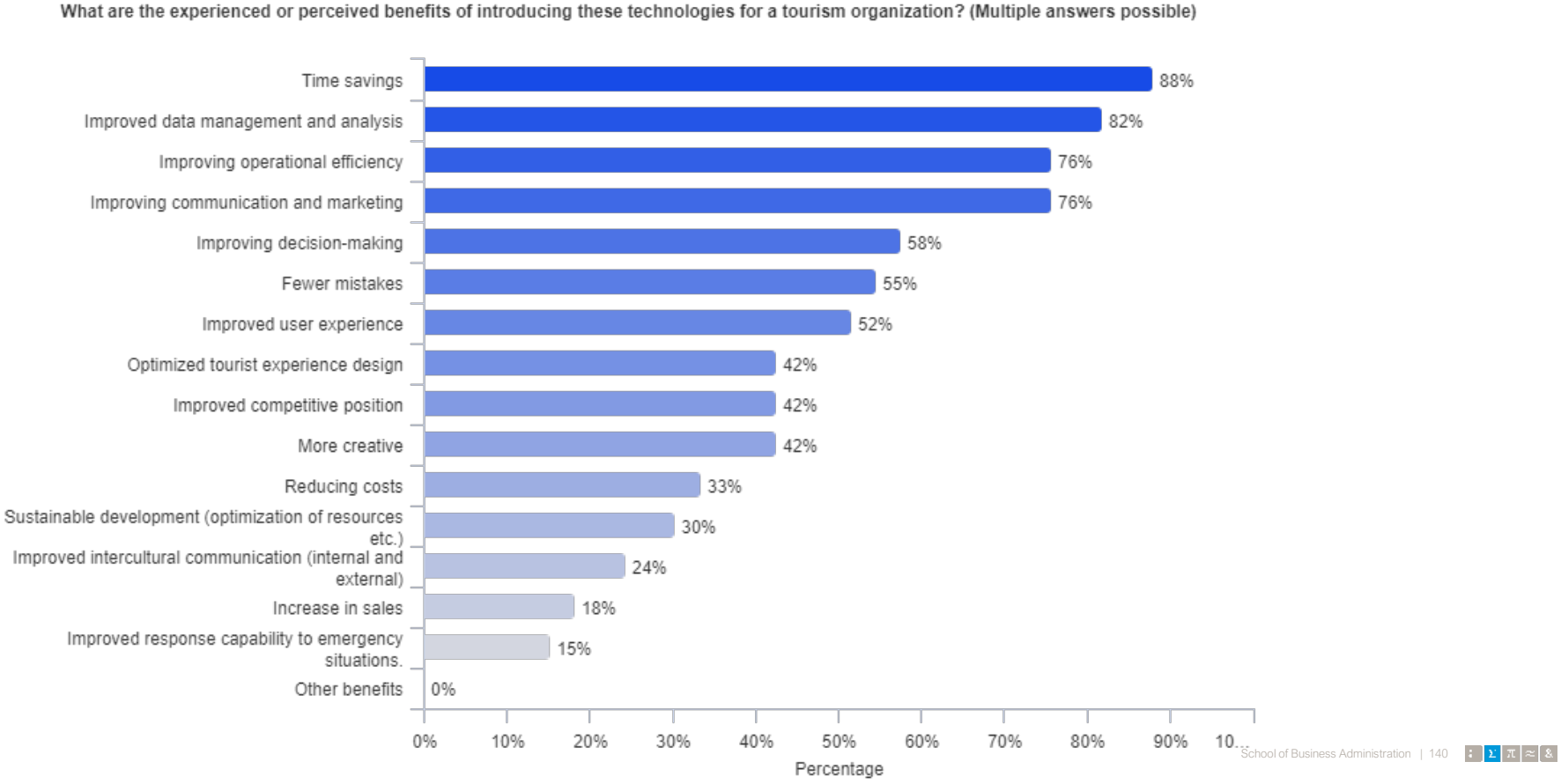
Austria: AI Visibility Strategy



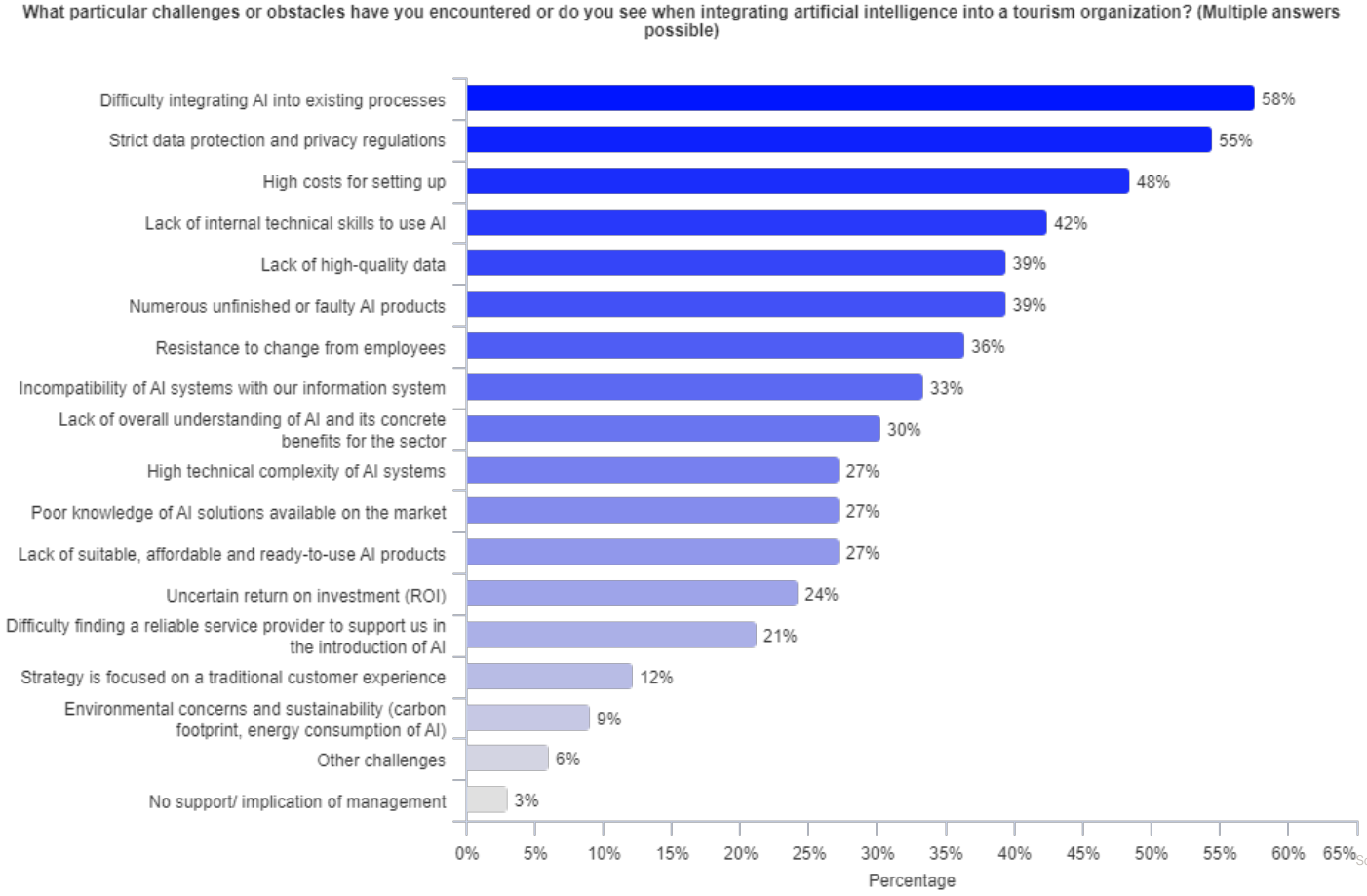
Austria: Key Use Cases for AI



Austria: Perceived Benefits of AI

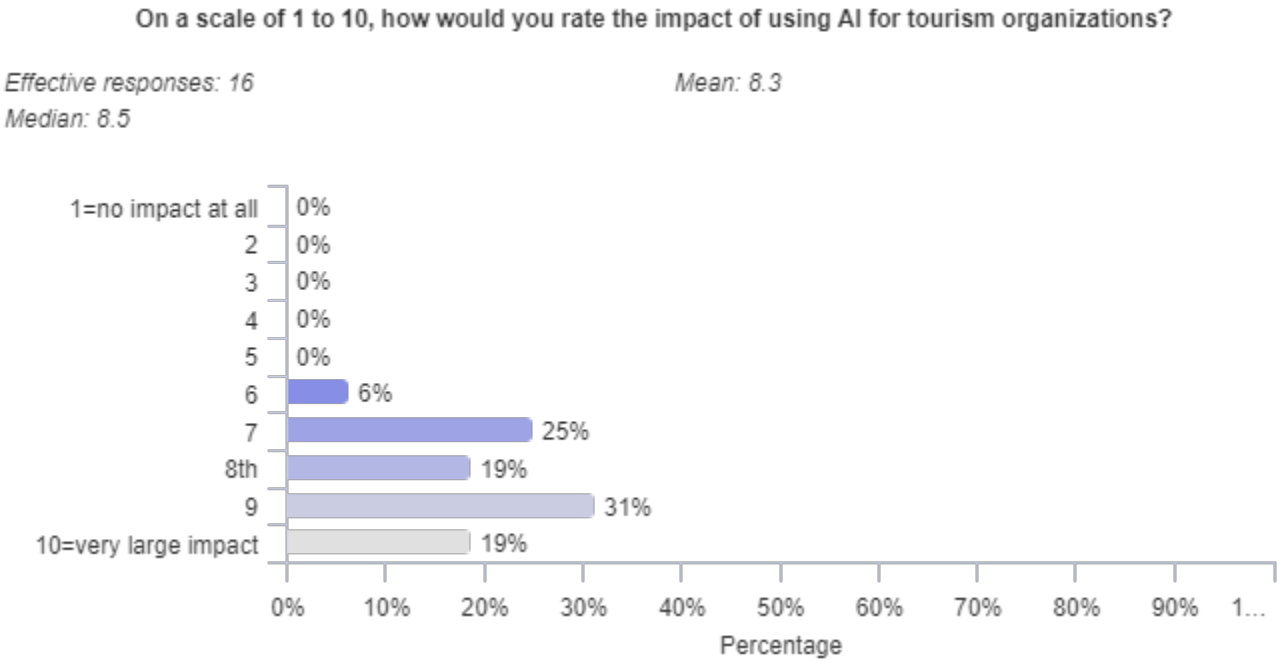


Austria: Barriers and obstacles to the adoption of AI

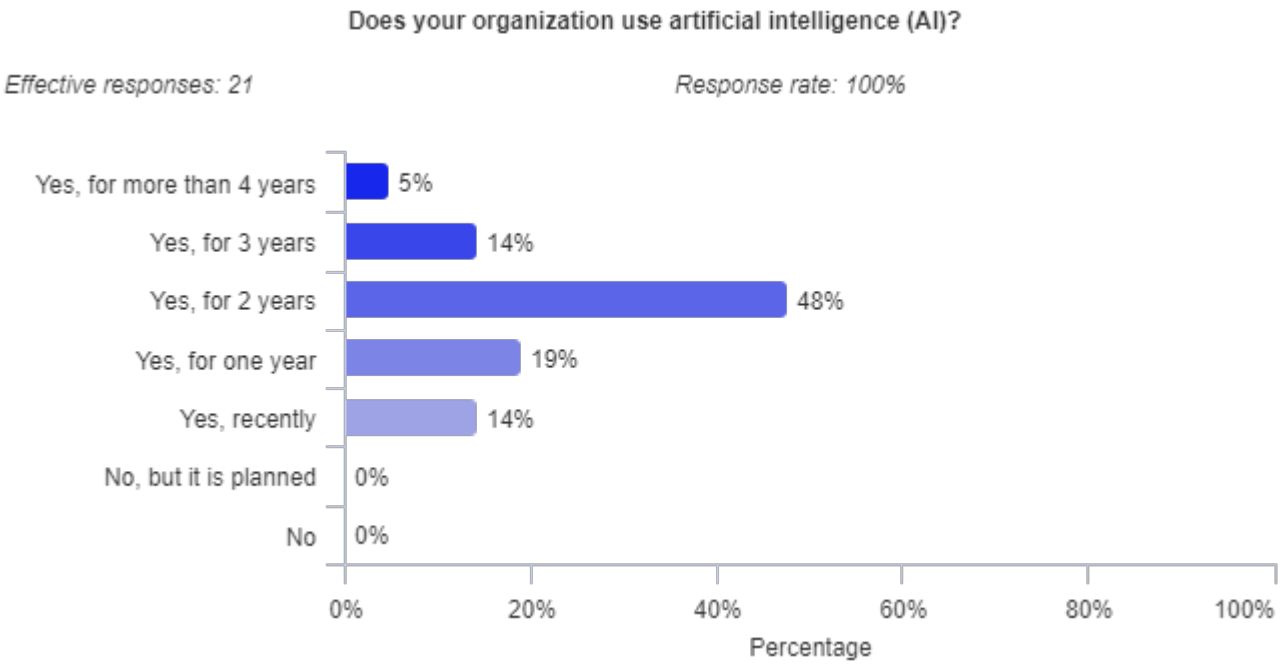




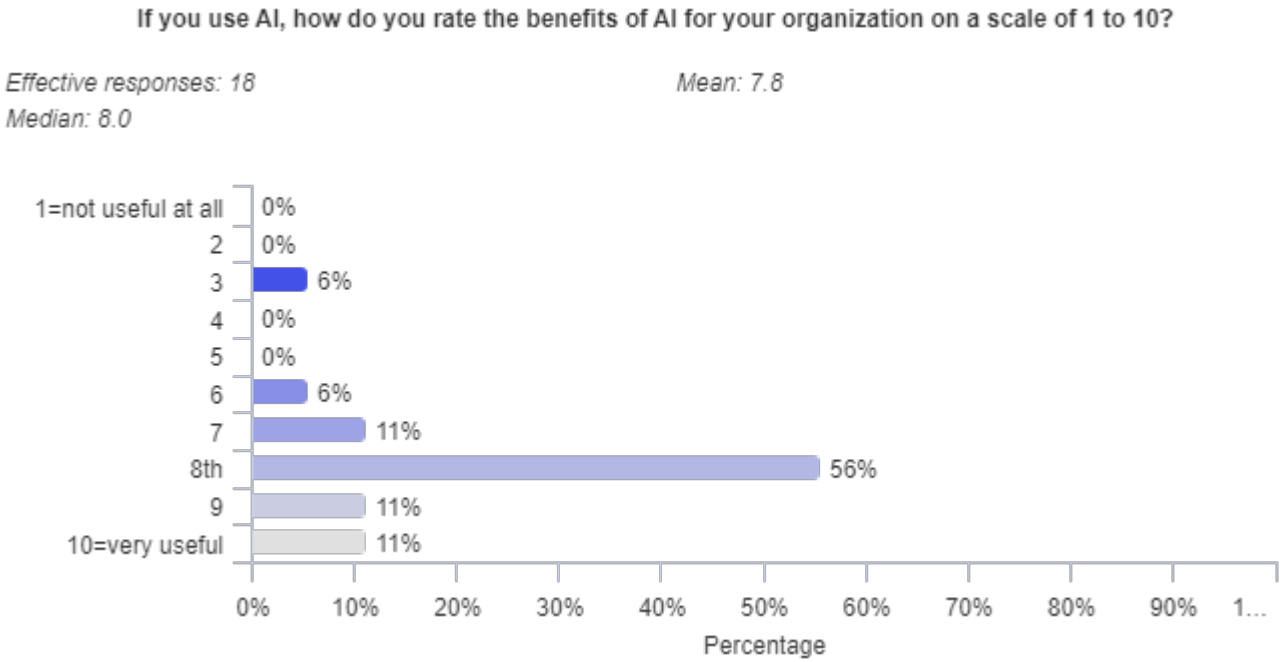
Canada: Perceptions of the Impact of Artificial Intelligence



Canada: The Use of AI in DMOs



Canada: Perceived Usefulness of AI for DMOs

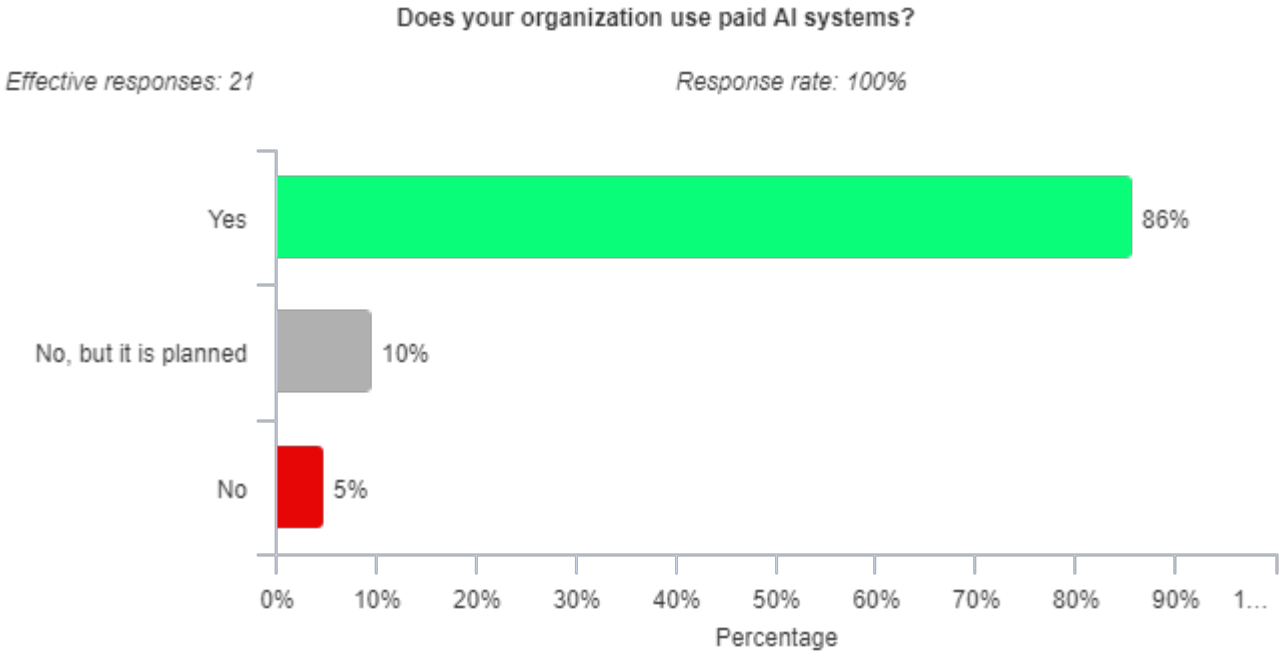


Canada: AI technologies currently in use or under consideration



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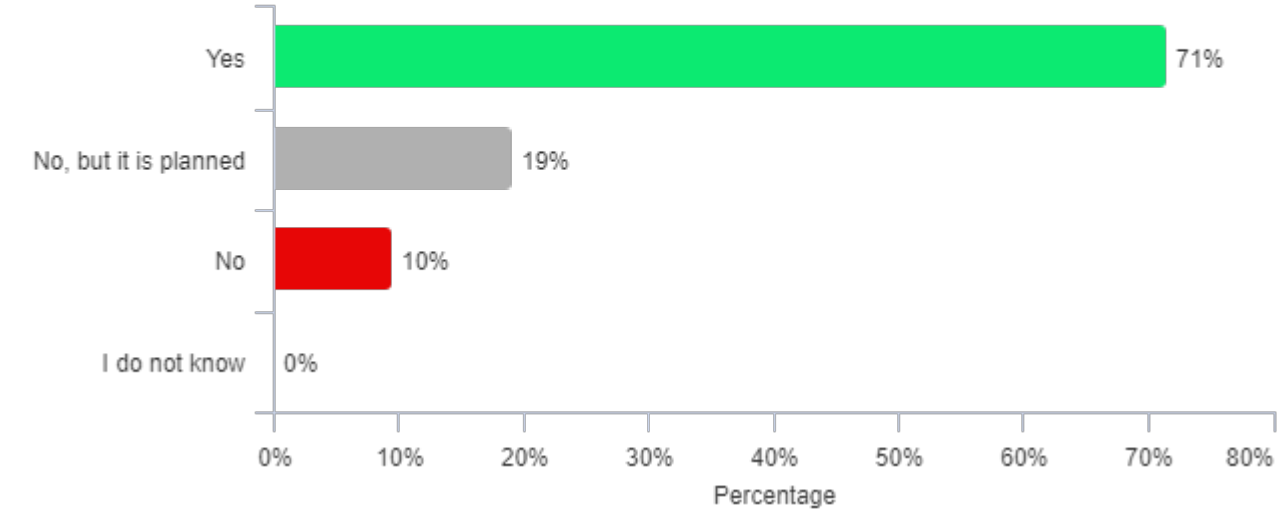
Canada: AI Tools for Beginners



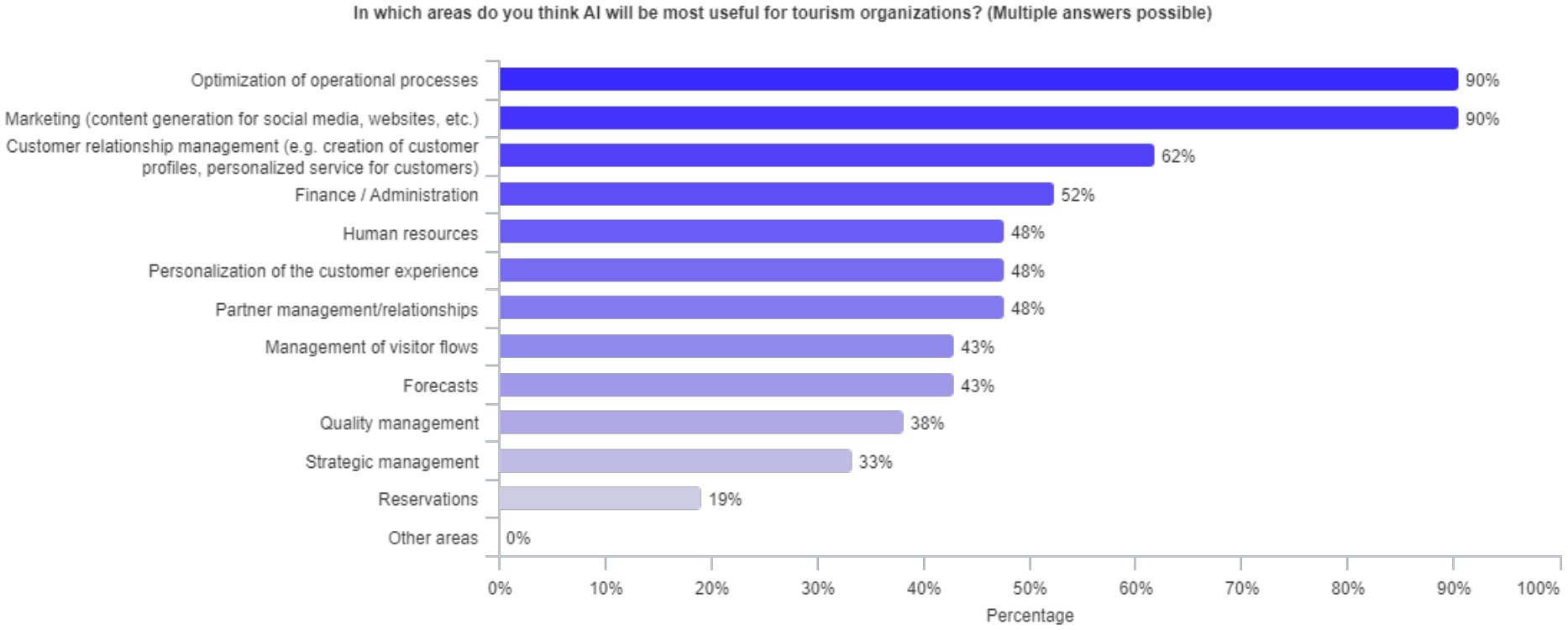
Canada: AI Visibility Strategy

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

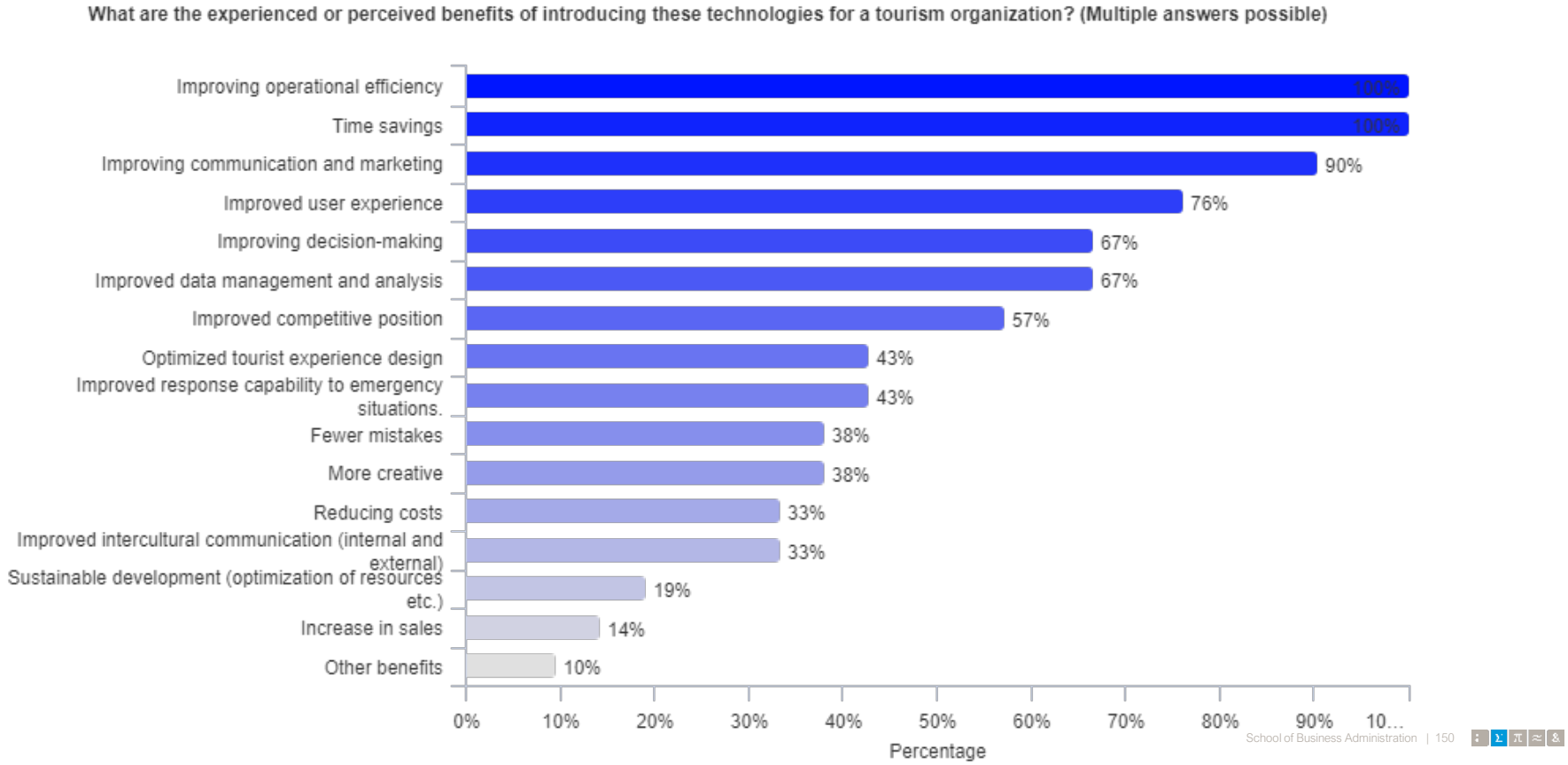
Effective responses: 21 *Response rate: 100%*



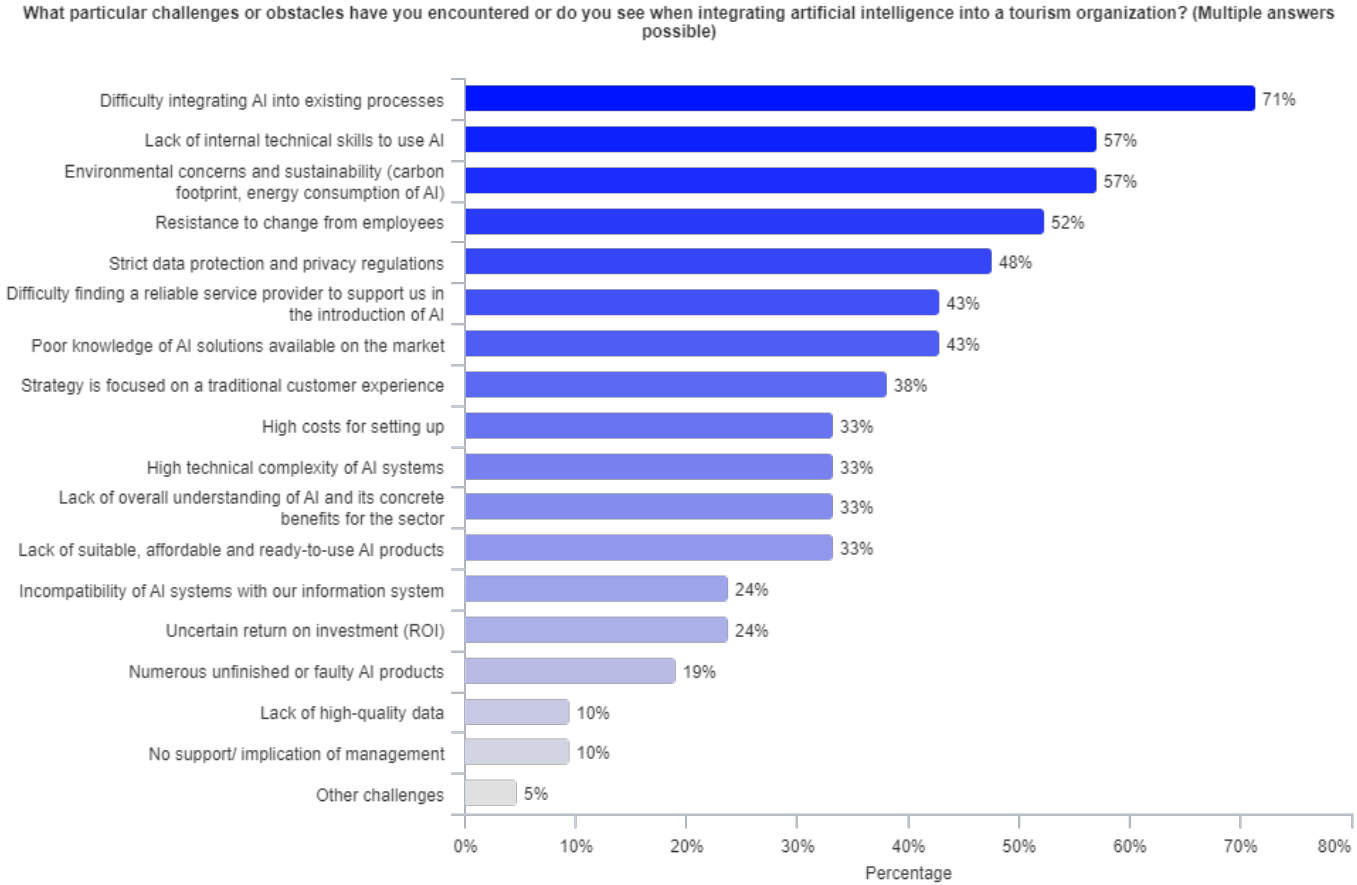
Canada: Key Use Cases for AI



Canada: Perceived Benefits of AI



Canada: Barriers and Obstacles to the Adoption of AI

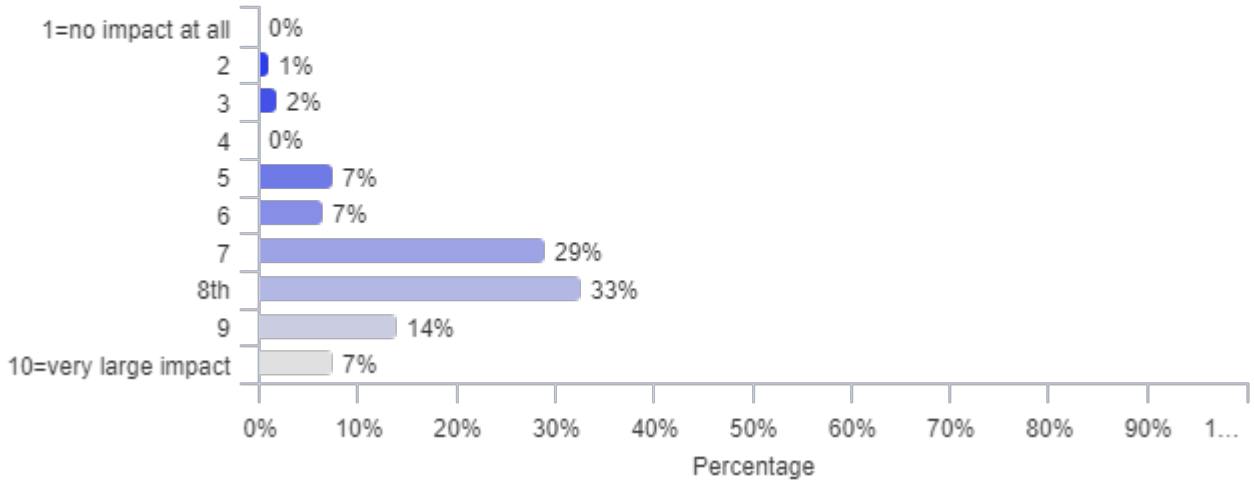




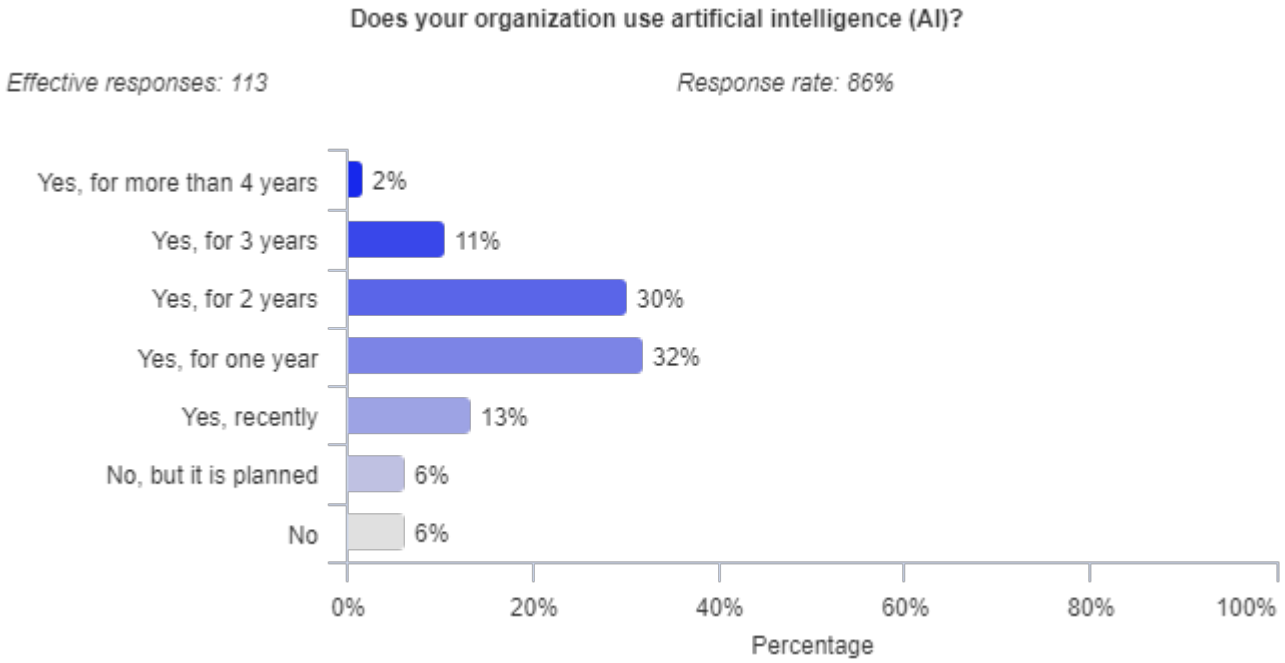
France: Perceptions of the Impact of Artificial Intelligence

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

Effective responses: 107
Mean: 7.5
Median: 8.0



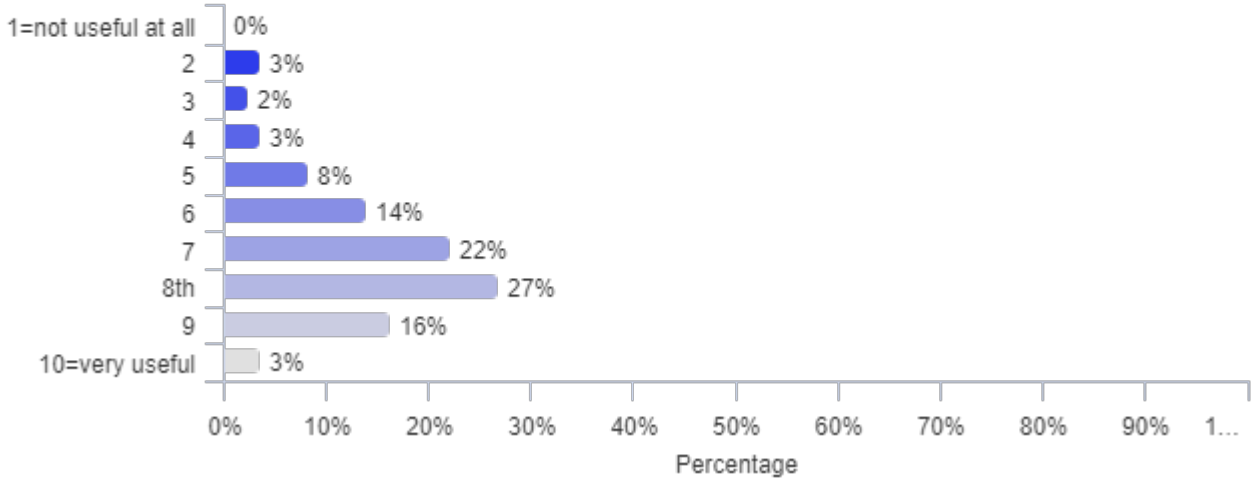
France: The Use of AI in DMOs



France: Perceived usefulness of AI for DMOs

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

Effective responses: 86 *Mean: 7.0*
Median: 7.0

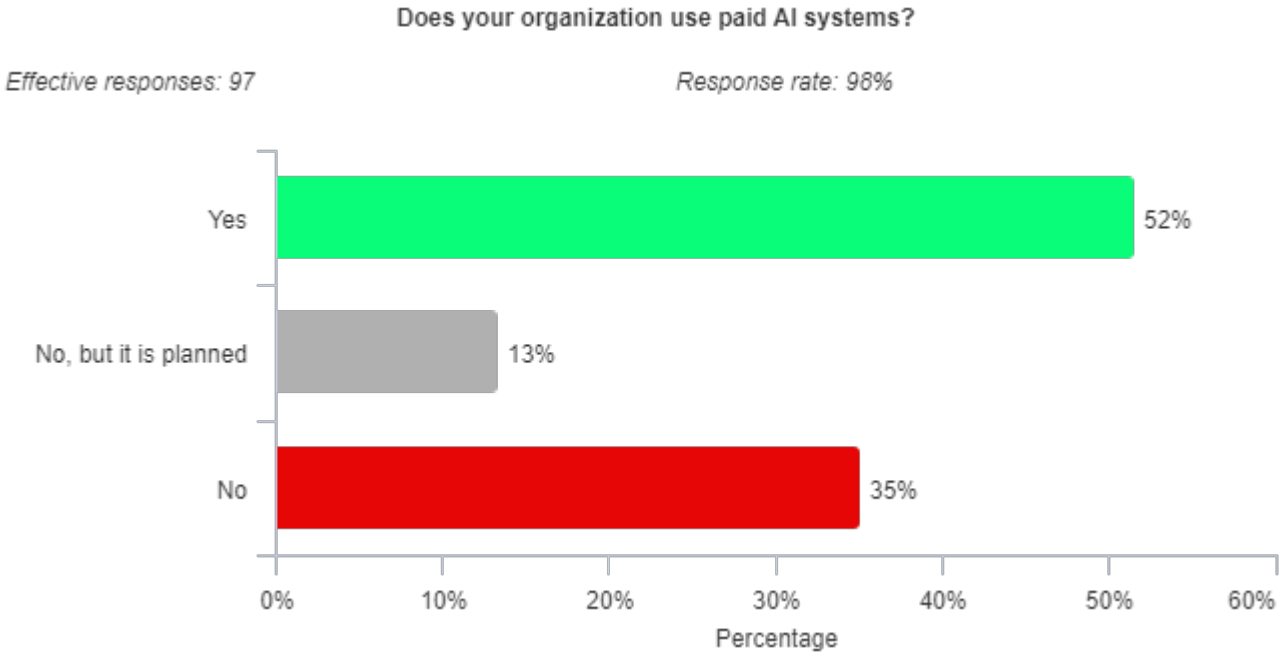


France: AI technologies currently in use or under consideration

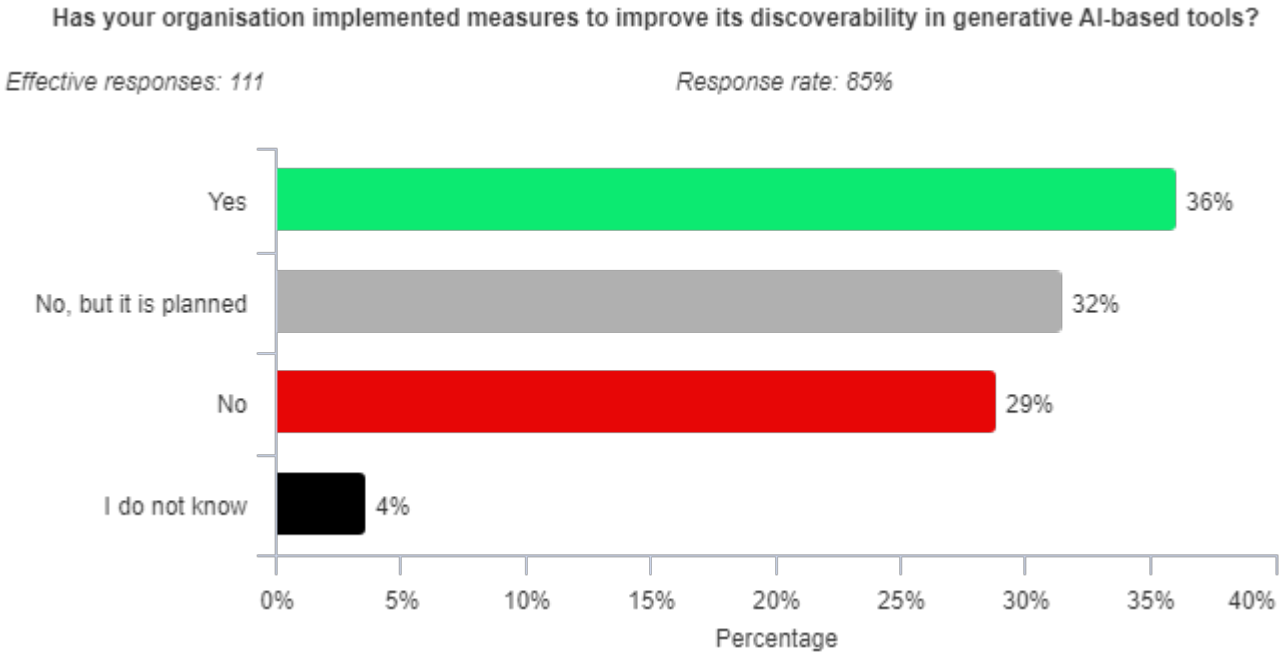


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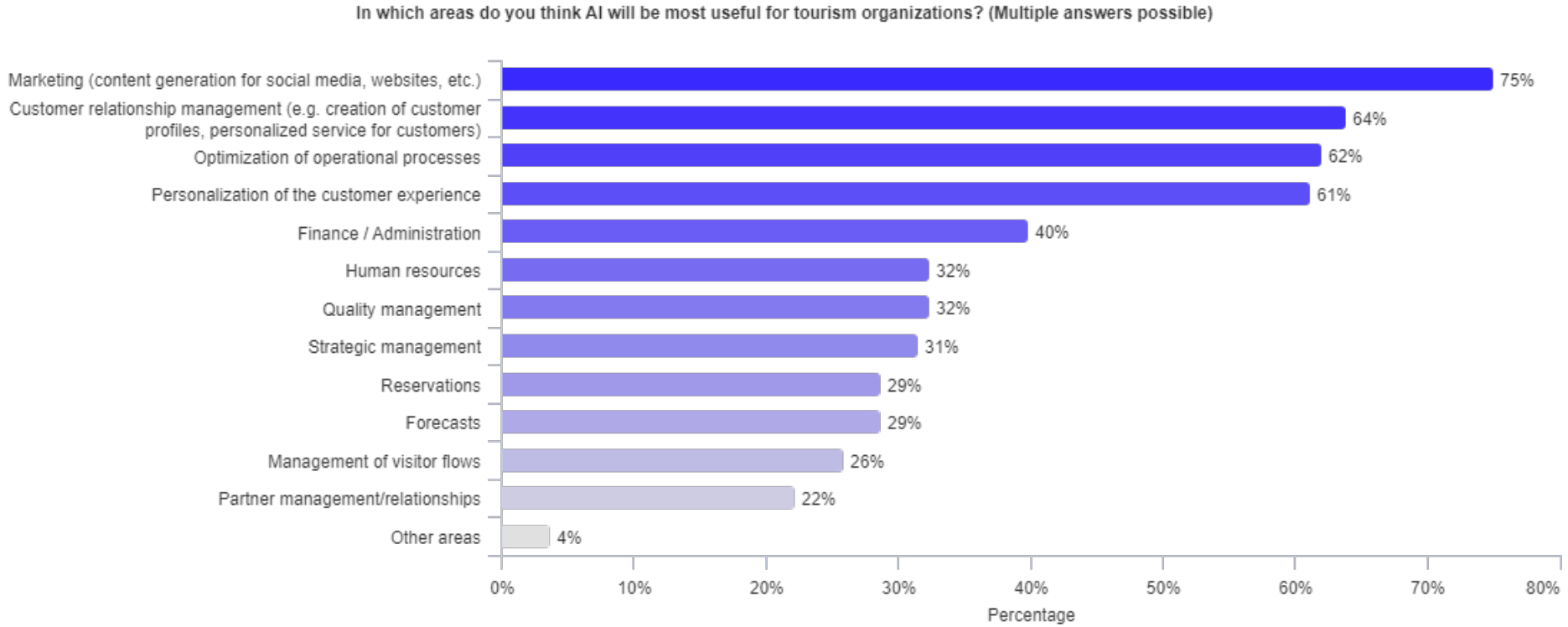
France: Paid AI tools



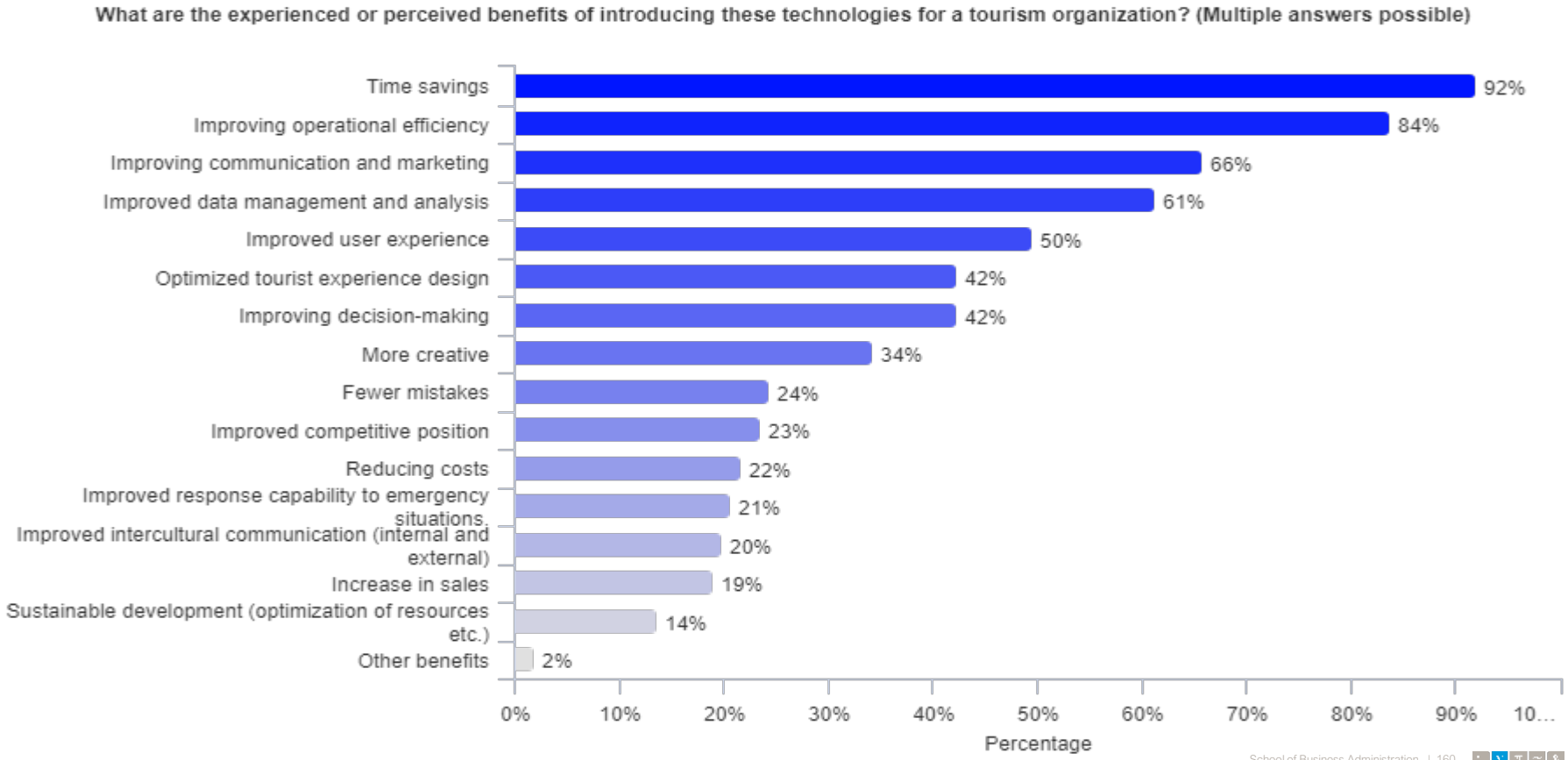
France: AI Visibility Strategy



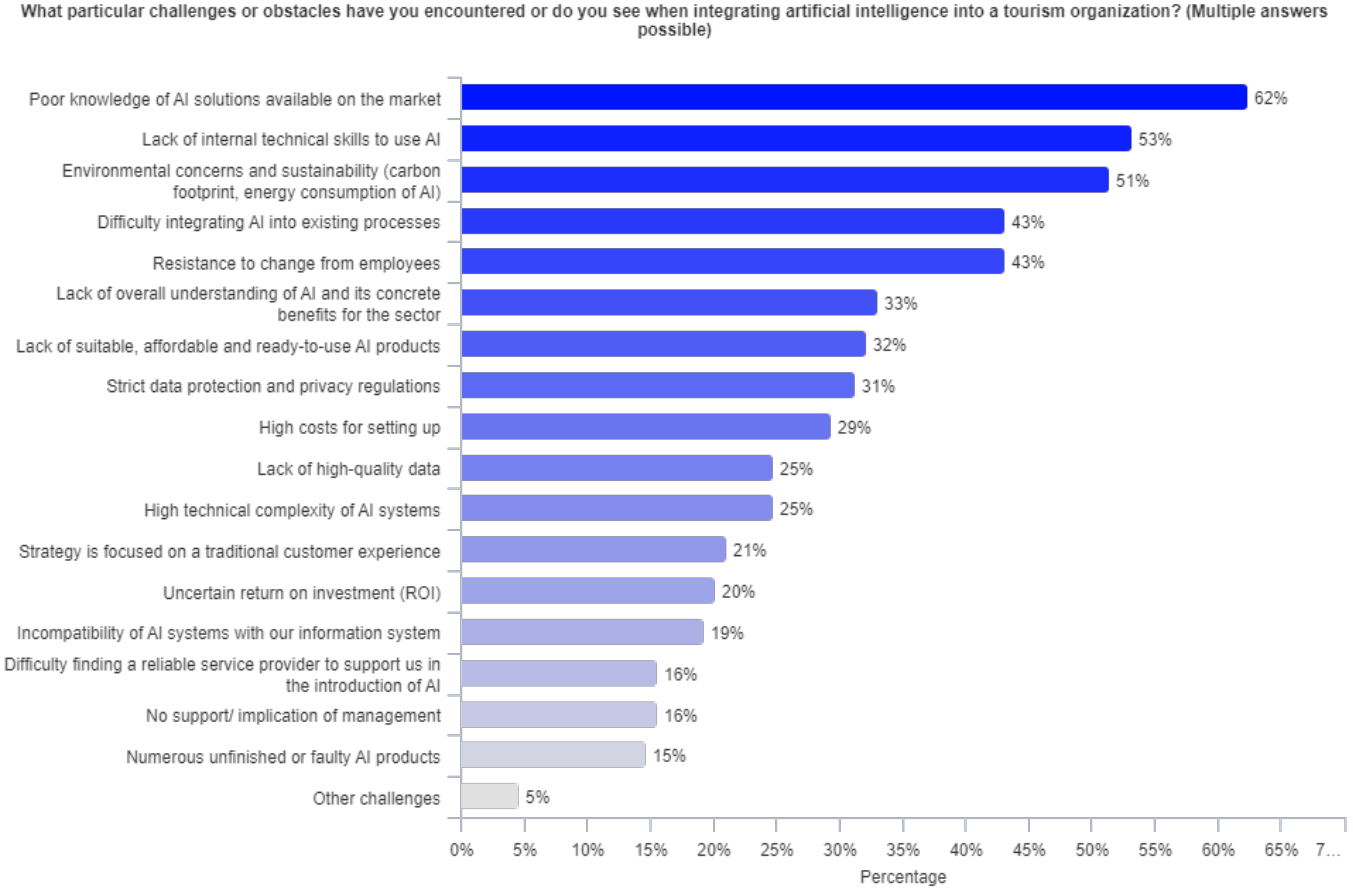
France: Key Use Cases for AI



France: Perceived Benefits of AI



France: Barriers and Obstacles to the Adoption of AI

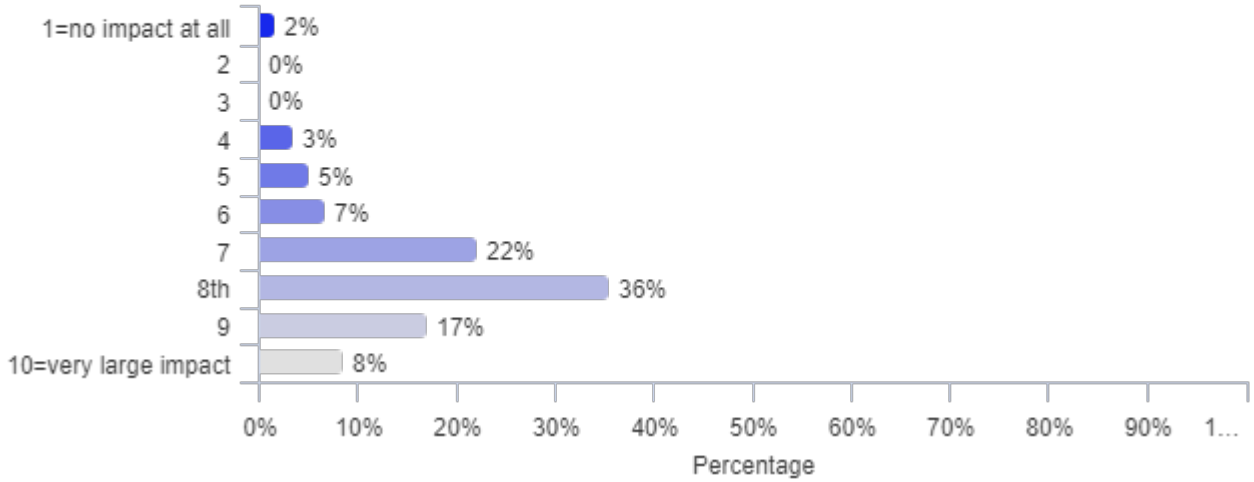




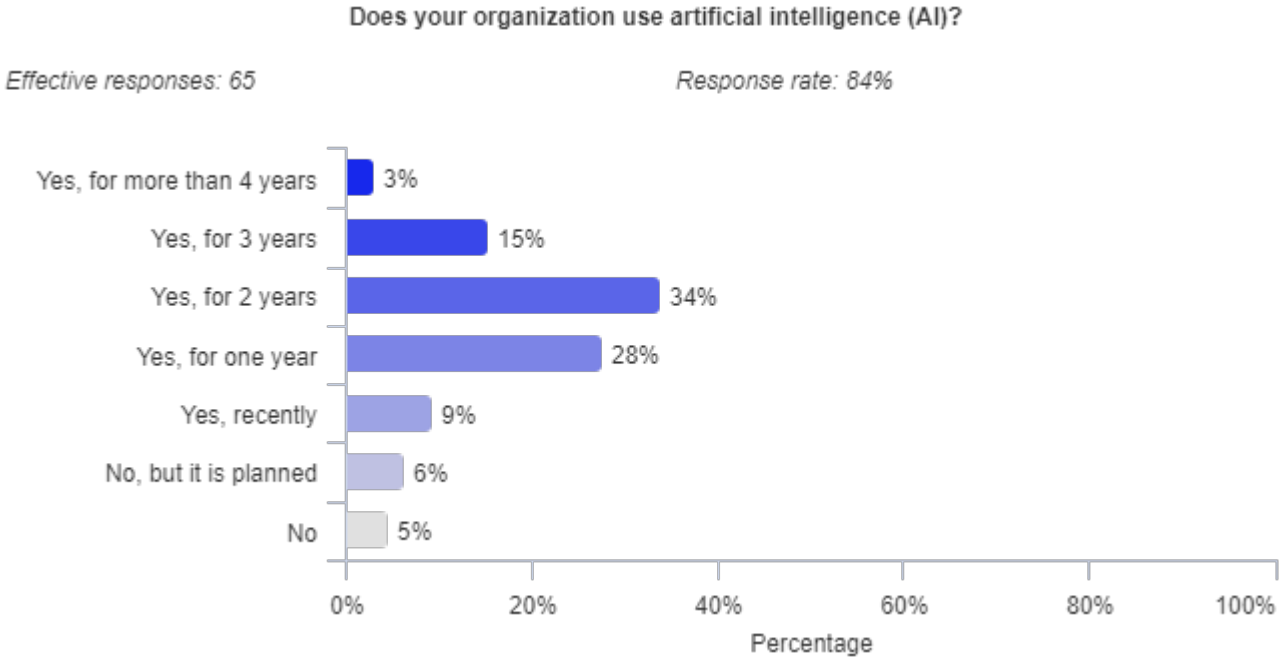
Switzerland: Perceptions of the Impact of Artificial Intelligence

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

Effective responses: 59
Mean: 7.6
Median: 8.0



Switzerland: The Use of AI in DMOs



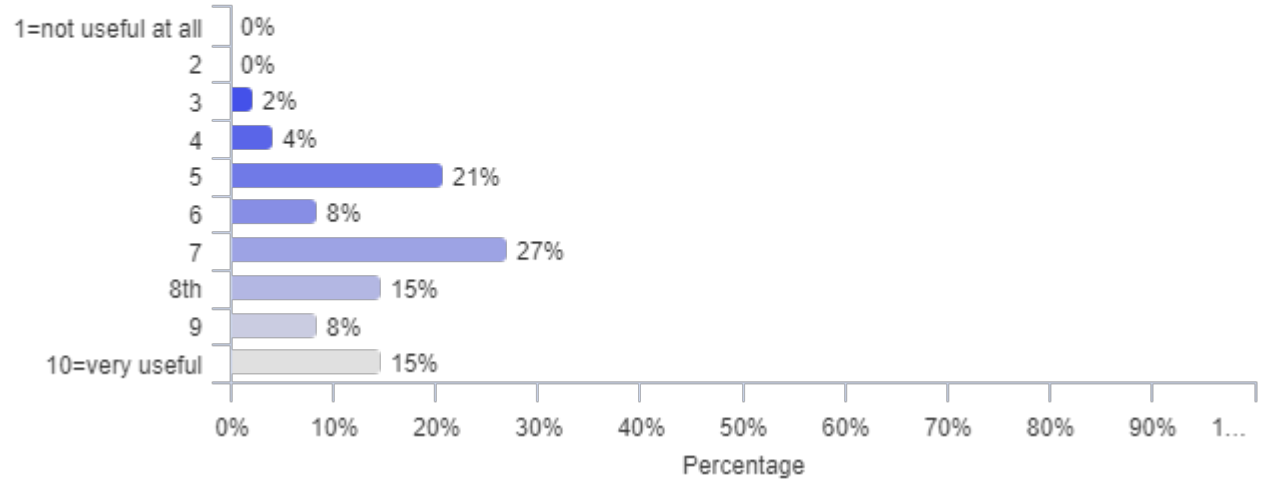
Switzerland: Perceived Value of AI for DMOs

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

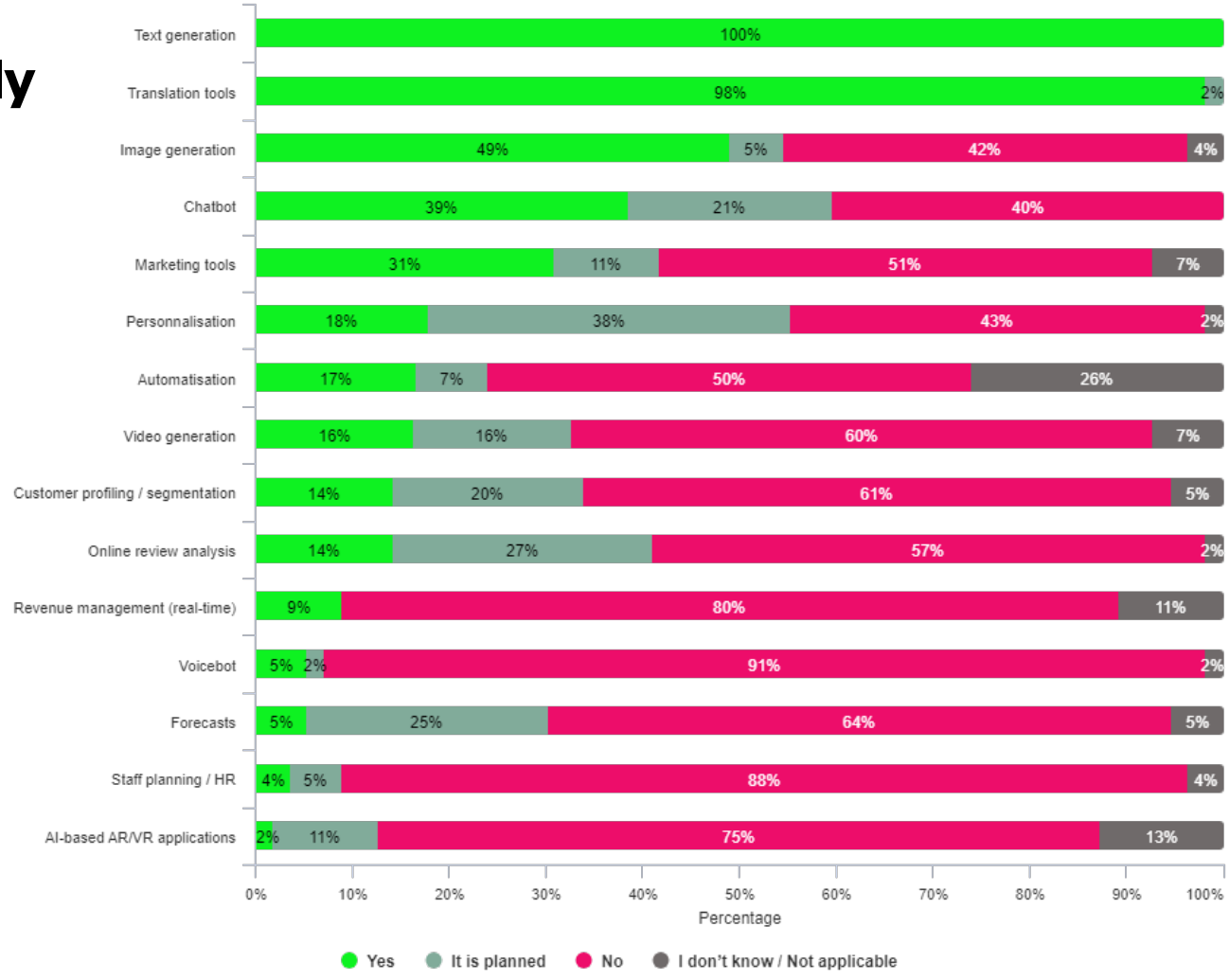
Effective responses: 48

Mean: 7.0

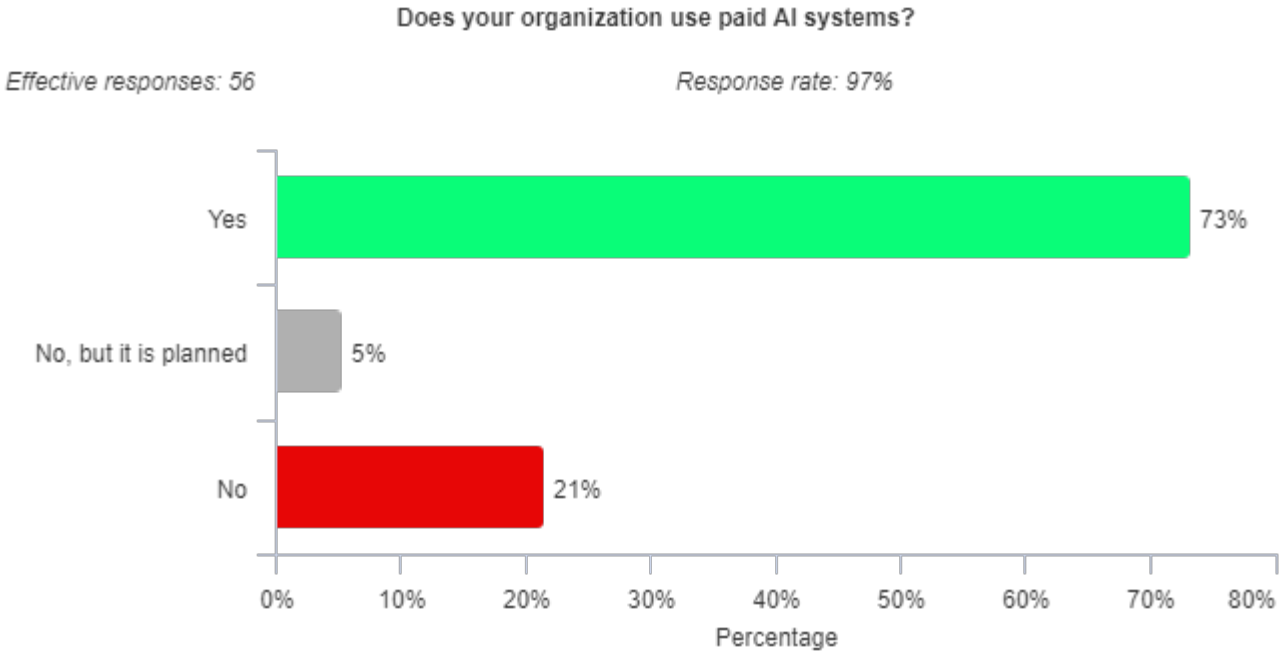
Median: 7.0



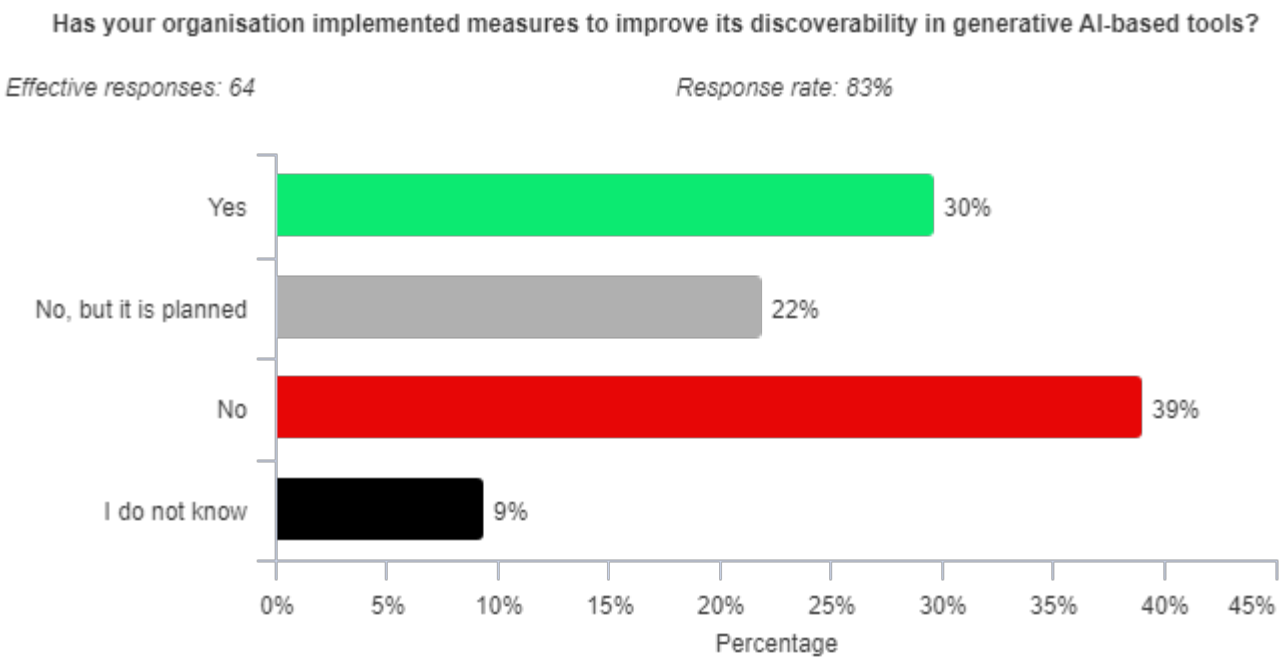
Switzerland: AI technologies currently in use or under consideration



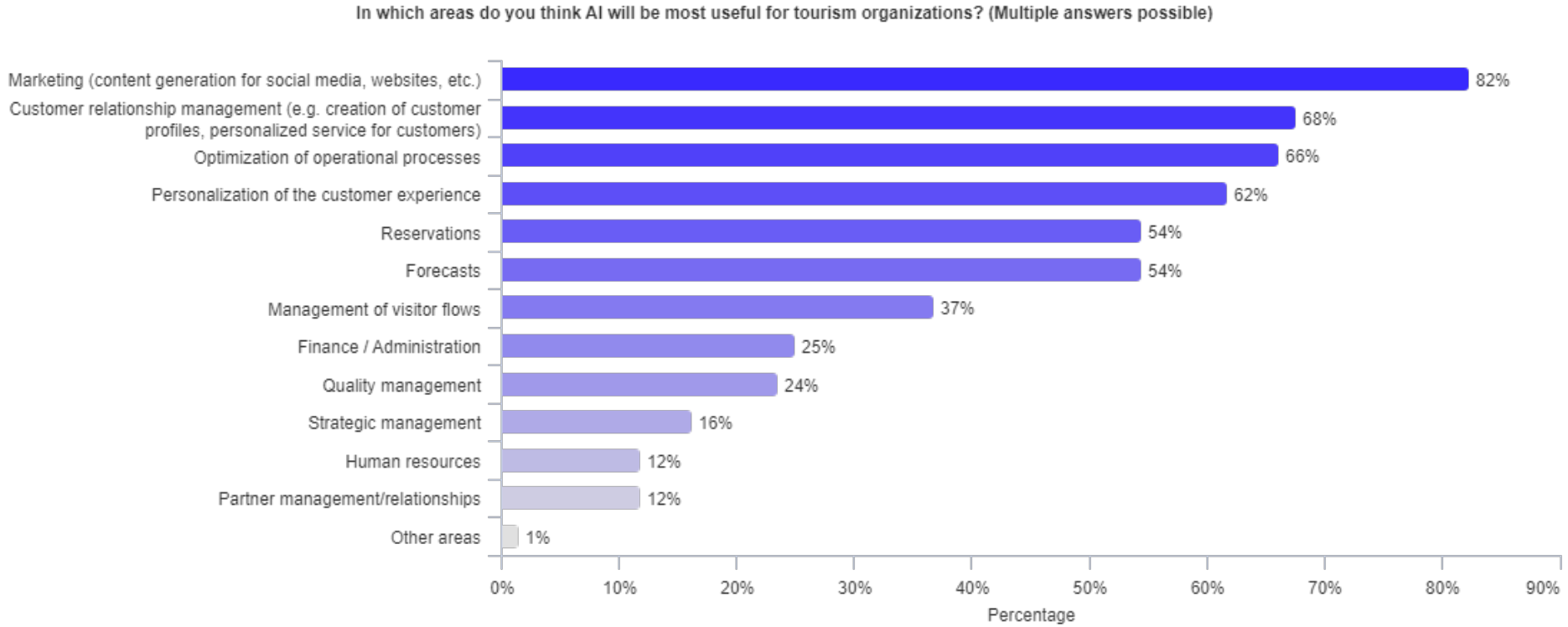
Switzerland: Paid AI tools



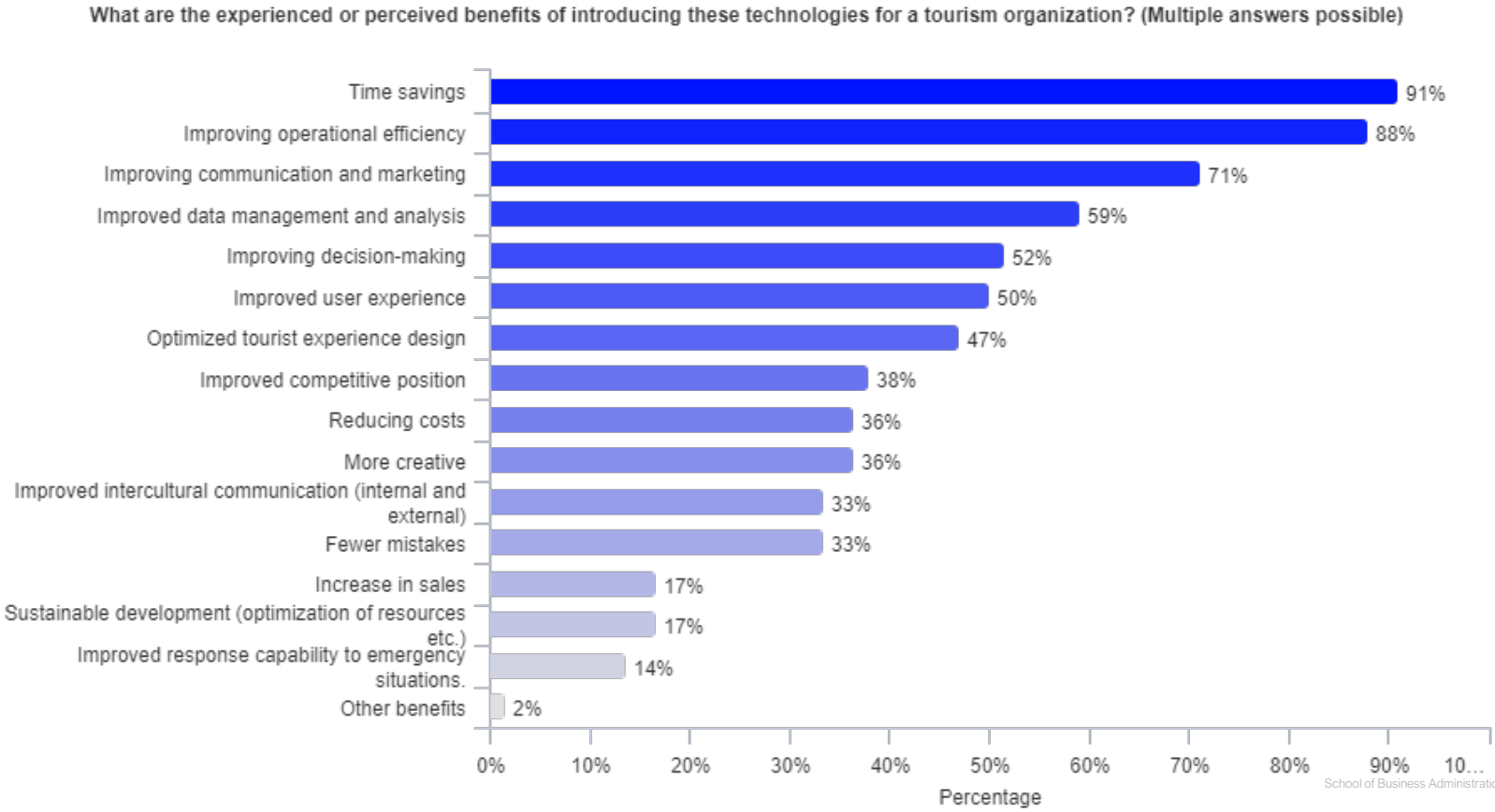
Switzerland: AI Visibility Strategy



Switzerland: Key Use Cases for AI



Switzerland: Perceived Benefits of AI



Switzerland: Barriers and Obstacles to the Adoption of AI

