BEYOND THE HYPE

TIME TO GET PRACTICAL

STRATEGIC PARTNER

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2025 SURVEY ON DESTINATIONS'
AI ADOPTION & IMPACT

AI Opener for Destinations
October 2025

FOREWORD

In 2025, the majority of destination professionals are using the most common AI tools in their daily work... and loving it.

Across Europe and North America, destination organisations are no longer asking whether AI matters. The question now is: how do we make it matter more?

In 18 months, the use of AI has moved from experimentation to integration — but not yet to strategy. For example, AI use for analytical and creative writing among destination professionals has risen from 33% to 81%.

With over 300 respondents from 157 destination organisations, the **2025 AI Adoption Survey of the AI Opener for Destinations programme** is a data-rich view of how destination professionals are working with AI – where confidence is growing, where structures are missing and where opportunities are slipping by. It charts a landscape where AI tools are multiplying faster than teams can keep up with, and where curiosity still outpaces clarity.

This is the second time Group NAO has launched this survey in collaboration with Miles Partnership, City Destinations Alliance and European Travel Commission in Europe.

Designed as a long-term knowledge effort, the study not only tracks change over time but also aims to support it. Our intent is very practical: to inform better conversations, better strategies and better capacity-building for AI in destinations and in tourism.

The report invites destination organisations to ask not just how far they've come, but what kind of future they want to shape with AI.

Thank you to Miles Partnership, our strategic partner in AI Opener for Destinations and leading the North American cohort, as well as to the AI Opener Collaborative partners in the European cohort, European Travel Commission and City Destinations Alliance.

Group NAO
October 2025

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CONTENT

EXECUTIVE SUMMARY

Compared to 2023, the key finding of this 2025-survey of AI adoption and impact across destination organisations is clear: It is time to get practical and strategic with AI adoption.

The 2025-survey reports the responses of 311 professionals from 157 destination organisations (at varying levels — from province to state, from region to national) across Europe and North America. It reveals a clear shift: AI familiarity has surged, practical use has spread, and playfulness and optimism are on the rise.

AI is now widely applied; only 1% say they have never used AI at work, and most destination professionals have engaged with AI for writing, translation and administrative tasks. While internal AI use is growing fast, very few have yet to launch consumer-facing AI tools.

Still, strategic frameworks does not seem to keep pace: Just 16% of respondents report having an AI strategy in place. While employees are sprinting ahead with AI experimentation, many destinations still report a lack in leadership, frameworks and strategic clarity to scale AI in meaningful, purposeful ways.

HERE IS WHAT STANDS OUT:

- **Confidence is up:** Familiarity with AI tools has jumped significantly from 38% in 2023 to 58% in 2025. Only 11% of DMO professionals still feel unfamiliar. Men, younger professionals, North Americans and top managers report higher confidence. Like in 2023, the gender gap persists — and so does the link between use and confidence.
- **AI usage is no longer experimental:** AI is now part of destination professionals' work life: 83% have used it for writing, 75% for translation, and nearly half for data and design tasks. The share of those, who have never used AI at work, has dropped from 21% to just 1%.
- **Mostly behind the scenes:** The vast majority of AI use among destination organisations is inward-facing. Very few have launched AI tools aimed directly at visitors or stakeholders. AI is not yet used to enhance the visitor experience at scale, and external-facing services remain rare, under-tested and often in pilot form.

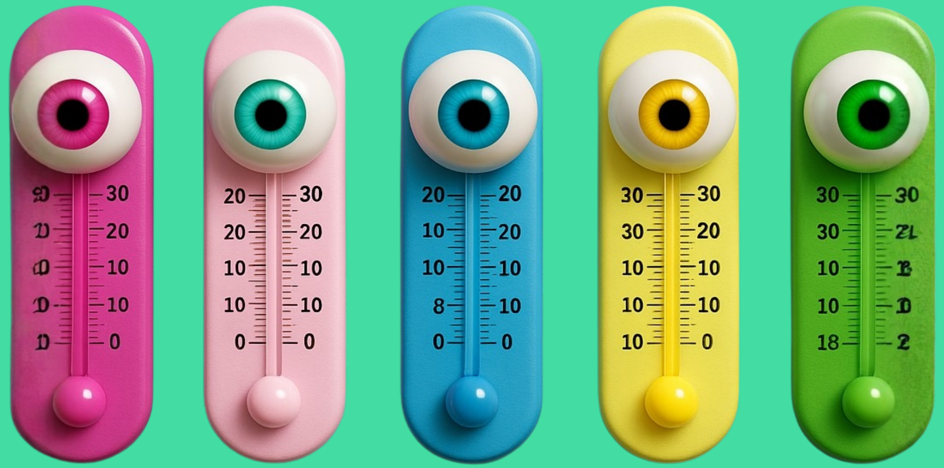
EXECUTIVE SUMMARY

- **AI is widely perceived as good, useful — and fun:** AI is widely seen as improving efficiency and workflow satisfaction. 75% say it has a positive impact on work life (up from 57% in 2023), and curiosity remains high. Only 9% now fear job loss due to AI, and most respondents enjoy experimenting with new tools.

- **Strategic structure and initiative are limited…** One third report that their organisation has neither a strategy nor any strategic work underway. Only 16% say their organisation has an AI strategy. Even when including those currently developing one, one third lack any form of strategic direction, and 1 in 8 don't even know if one exists. Among those with a strategy, only half include basics like a guiding vision or clear AI governance.

- **The ambition—implementation gap is wide:** Despite increased optimism (growing from 27% to 49% in 18 months), 2 out of 5 destination organisations haven't launched any internal or external AI solutions. Custom GPTs are the most common application (24%), followed by chatbots (19%). Still, most activity is early-stage, driven by a few individuals, not entire teams.

- **AI is expected to reshape the tourism sector:** There's broad agreement that AI will transform both how destination professionals work and how visitors plan and experience travel. Trends like automated trip planning, AI-generated content and search disruption are seen as inevitable. Yet despite this shared outlook, organisations are unevenly prepared. Outdated systems, rigid workflows and a lack of strategic direction are holding many back.



METHODOLOGY: WHAT WE DID

The purpose of this survey has been to assess the current AI adoption among destination organisations and what their outlook is for future adoption

Part of the survey is repeated from the **2023 AI Maturity Assessment of Destinations** to allow for comparisons.

The 2025 survey took place from April 28 to June 16, 2025, approximately 1,5 years after the 2023. 311 responses were gathered by email invitation via the AI Opener for Destinations Programme, as well as through invitation and reminders via various destination European networks — City Destinations Alliance and European Travel Commission. In North America, Miles Partnership distributed with direct email to destinations. Additionally, answers were gathered via LinkedIn. After completion, all entries have been reviewed to ensure relevance.

The survey was designed and distributed as an open link, only permitting one answer per respondent (per IP address). However, destination organisations were encouraged to get multiple colleagues to answer. Thus, the 311 different survey answers represent 157 different destination organisations. 84% from Europe (260), and 16% from North America (51).

The survey includes several background variables such as gender, job category, seniority, etc. However, due to the limited sample size (especially from 2023 with 210 answers), the results are only indicative when broken down across variables.

THE RESPONDENT PROFILE:

The respondent profile in the 2025 survey highlights continuity in demographics since 2023, with notable shifts towards more senior respondents, and increased representation from marketing & communications:

- **Predominantly female:** The 2025 survey respondents were predominantly women (71%), an increase from 62% in the 2023 edition of the survey. The age distribution remained similar with the majority between 30 and 49 years old (65% aged 30–49). Only 7% were under 30, and 5% were aged 60 or older.
- **DMOs dominate:** Most respondents (57%) work for a city-level DMO. National Tourism Organisations (NTOs) account for 14%, and Regional Tourism Organisations (RTOs) for 9% of respondents.

METHODOLOGY: WHO RESPONDED

THE RESPONDENT PROFILE (continued):

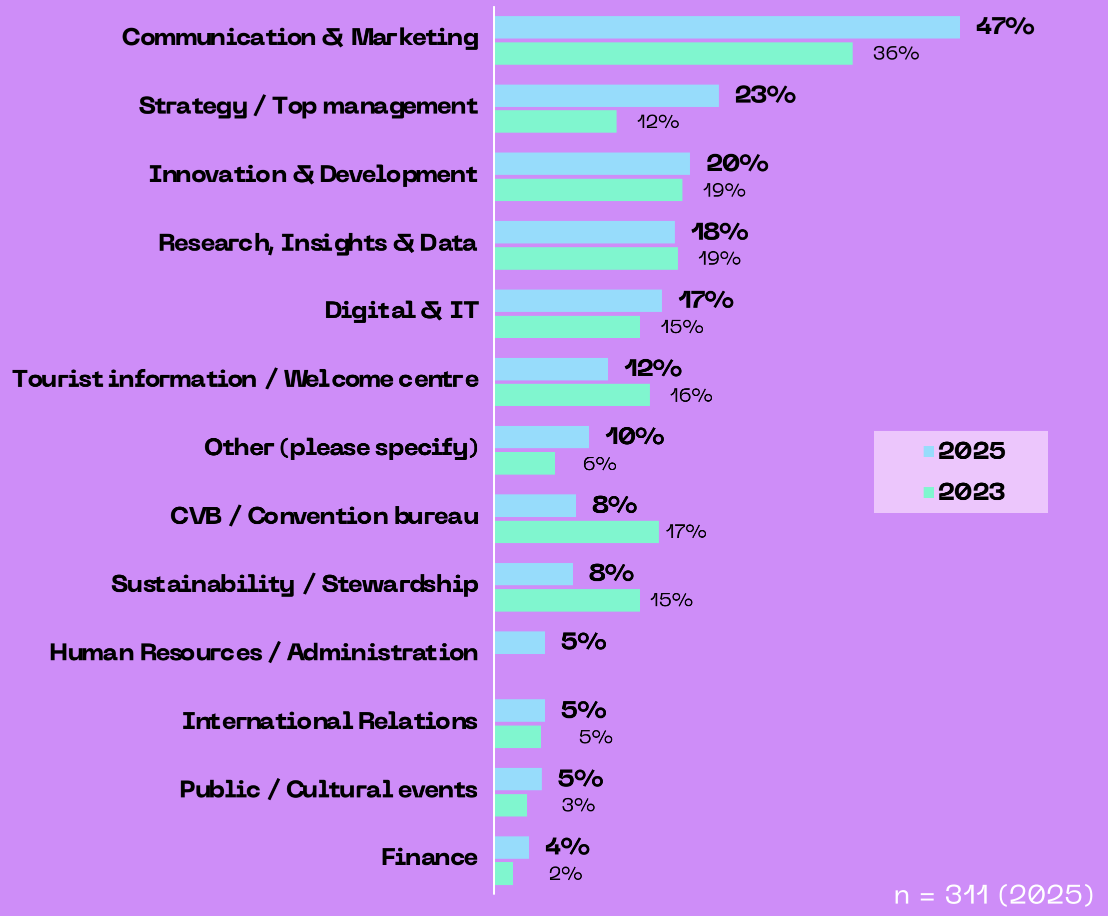
- **Generally small & medium-sized destination organisations:** The largest group work in organisations with 31–100 employees (40%), followed by those with 11–30 employees (29%). About 18% come from teams with 10 individuals or fewer.

- **Experienced respondents:** Tenure data shows that one in three respondents (32%) have worked at their organisation for 10 years or more. By contrast, only 23% have been at their workplace for two years or less.

- **Communications & Marketing dominate:** Nearly half work in Communications & Marketing (47%) – an increase from 36% in 2023. Representation from Strategy/Top Management also grew (23% vs. 12% in 2023). Fewer responses were recorded from CVBs and Sustainability departments compared to 2023.

- **Mostly mid-level employees:** The organisational roles of respondents skew toward mid- and senior-level. 45% of respondents are Group Leaders or Project Managers. Top Management made up 29%, and 10% came from entry-level staff.

RESPONDENTS' DEPARTMENT WITHIN DESTINATION ORGANISATION



CHAPTER 1

USAGE & PERCEPTION OF AI

CHAPTER PREVIEW: AI fluency familiarity is on the rise as 58% say they are "very familiar," up from 38% in 2023, and only 1 in 10 still feel unfamiliar. Where destination organisations set a clear direction and invest in upskilling, people flourish with AI; where the plan is more fuzzy, people miss out on the benefits. This chapter unpacks the patterns and surprises behind these numbers and more.

AI FAMILIARITY ON THE RISE

Familiarity has grown significantly: 58% say they are familiar with AI models & tools in 2025, up from 38% in 2023. Only 11% feel unfamiliar, compared to 38% in 2023.

Gender gaps narrow, but remain: Familiarity has risen for men (53% → 70%) and women (31% → 53%) since 2023.

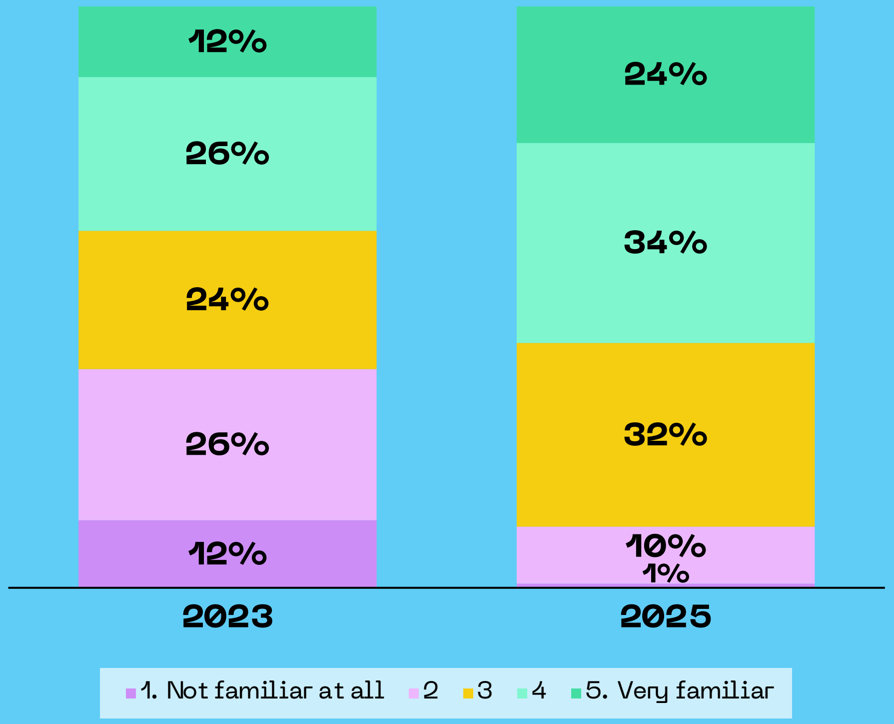
North America leads on familiarity: 73% of North Americans consider themselves familiar with AI tools and models vs. 55% of Europeans. However, the small North American sample means results are only indicative.

Position and tenure point in opposite directions: Familiarity increases with organisational level (53% at entry level; 60% at top management) yet declines with time in role (65% for ≤2 years; 49% for 10+ years).

Age & department make a difference: 68% of respondents aged 20–39 feel familiar, compared to around 50% in older age brackets. 88% of those in IT roles feel familiar with AI, the highest among all departments.

Strategy and structure matter: 75% of those with clear internal approaches to AI adoption feel familiar, dropping to 50% in organisations with unstructured AI upskilling.

INCREASE IN FAMILIARITY WITH AI MODELS & TOOLS



Q: Overall, how familiar are you with some of the widely popular AI models and tools – like ChatGPT, Claude, Copilot, Gemini, Perplexity, Canva, Midjourney, or any other similar tools?

n = 285

AI USE IN DESTNATIONS IS SURGING

Writing leads the way: 83% now use AI for analytical and creative writing, up from 31% in 2023 – a dramatic shift.

Non-users have vanished: Only 1% now say they've never used AI at work, down from 21% two years ago.

Social media is slipping: The only individual use in decline is social media distribution, falling from 15% in 2023 to 11%.

Younger users dominate detail work: Adults aged 20–39 are more likely to use AI for proofreading (66% vs. 53% of those 50+) and for translation and social tasks.

Translation shows a transatlantic gap: Just 27% of North Americans use AI for translation VS 80% of Europeans.

IT and AI enthusiasts go further: AI enthusiasts and those in IT/Digital roles report higher-than-average use across nearly all tasks.

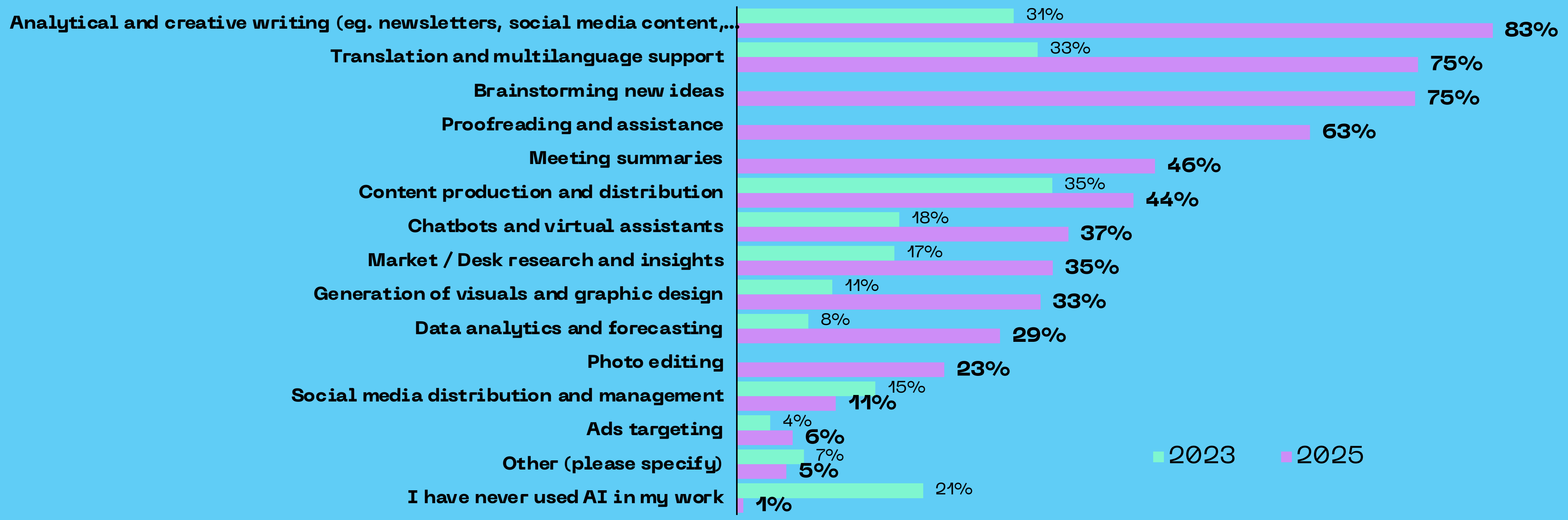
Leadership patterns mixed: 60% of top managers use AI for meeting summaries (vs. 26% of entry-level), but they lag on translations with 55% vs. 71%.

Strategy drives use: The results show that destination professionals are experimenting more when they come from organisations with an AI strategy in place, or working on one, or if they are from organisations where leadership treats AI as a priority.

AI USE IN DESTINATIONS IS SURGING

Nearly all forms of personal AI use are up since 2023; some have doubled – like chatbots and virtual assistants, while others have tripled, including visual design and data analytics.

FROM CHATBOTS TO ANALYTICS: USAGE IS UP!



Have you ever used any AI tools or solutions when working with any of the following tasks or objectives? *n = 285*

AI IMPROVES WORK LIFE OF DESTINATION PROFESSIONALS

Three perceptions of destinations professionals dominate: The most agreed-upon statements (all scoring above 4 out of 5) are that AI improves work life, increases efficiency and is enjoyable to explore.

Efficiency > creativity: 73% agree AI boosts efficiency, while only 52% say it enhances creativity. Support is the strongest among North Americans, top managers and those in communications, marketing or IT/digital.

Daily use is still somewhat limited: Just over half (53%) say they've integrated AI into their daily tasks. Among the least familiar with AI, only 14% say the same.

Gender differences in perception: 85% of men feel "curiosity" to explore AI vs. 65% of women. Women are also twice as likely to feel "sceptical" (17% vs. 8%).

Familiarity drives confidence: Those least familiar with AI are the most "sceptical" (21%), and less likely to see AI as useful for creativity or productivity.

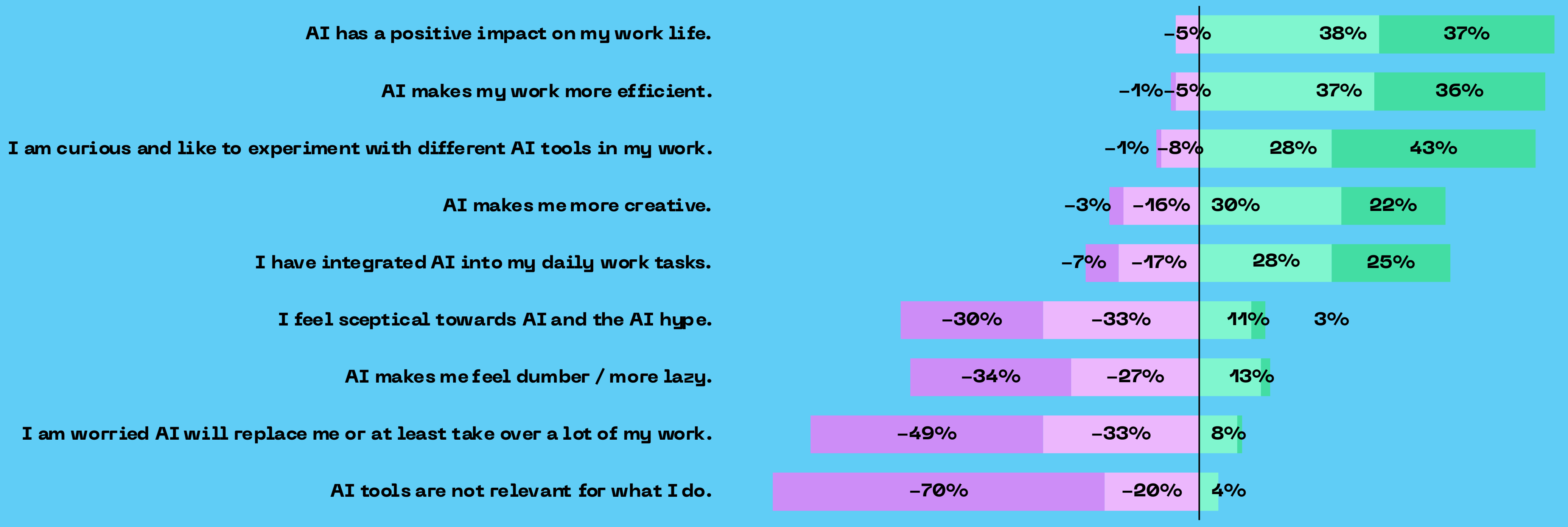
Culture and leadership shape sentiment: Where top management prioritises AI, respondents report higher impact on creativity, productivity and overall work experience, and less concern about laziness. Organisational stance on AI strongly influences how staff perceive its usefulness and risk

Overall optimism is rising: There is general agreement that AI positively affects work life, jumping from 57% in 2023 to 75% in 2025.

Job loss fears are low: Only 9% now worry about AI replacing jobs, down from 16% in 2023. Younger respondents are slightly more concerned than older ones.

AI IMPROVES WORK LIFE OF DESTINATION PROFESSIONALS

AI'S UPSIDE AT WORK: EFFICIENCY AND CURIOSITY LEAD, WORRY DECLINES



Q: Please let us know if you agree or disagree with the statements. n = 290

DESTINATION PROFESSIONALS ARE AI OPTIMISTIC

Optimism is growing fast: Sentiments are broadly consistent with the 2023 survey, but the share of respondents feeling optimistic or enthusiastic has nearly doubled.

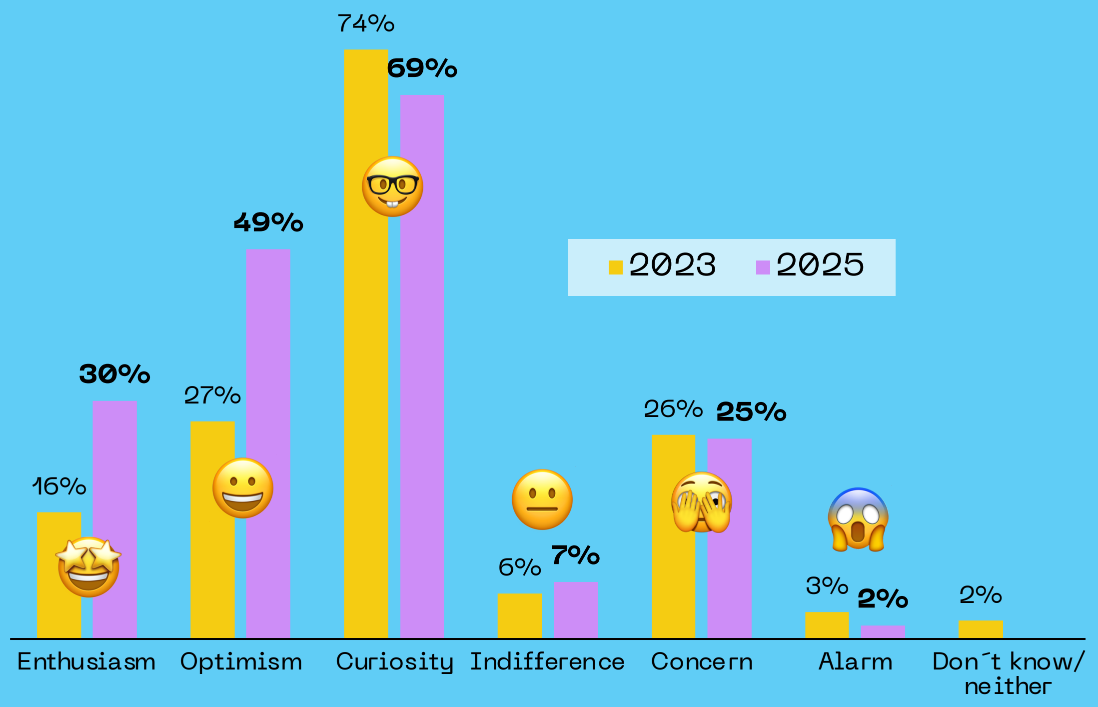
Curiosity holds steady: 69% express curiosity about AI's impact on tourism in 2025, nearly matching 2023's 74%.

Concern remains for some: 25% feel concerned about AI's tourism impact, similar to 2023 (26%). Concern is somewhat higher among top managers (32%).

NTOs lag in curiosity: Only 51% of National Tourism Organisation staff express curiosity, compared to 65% in DMOs and 71% in RTOs.

Enthusiasm spikes with structure: Enthusiasm is strongest among those in IT/Digital roles (44%), those with clear internal AI processes (41%), and those with an AI strategy in place (38%).

CLOSE TO DOUBLE-UP ON OPTIMISM AND ENTHUSIASM



Q: How do you feel about AI's overall impact on the tourism industry? Max 3 answers.

n = 293

TOO MUCH AI TO TRY, TOO LITTLE TIME

Time is the top obstacle: Only 2% report no challenges in working with AI. 62% say lack of time is the main challenge. This is more prevalent among national tourism organisation (NTO) employees (79%), and for those in Research/Data/Insights roles (72%).

Too many AI tools: 60% of NTO employees feel overwhelmed by the volume of AI tools vs 43% overall.

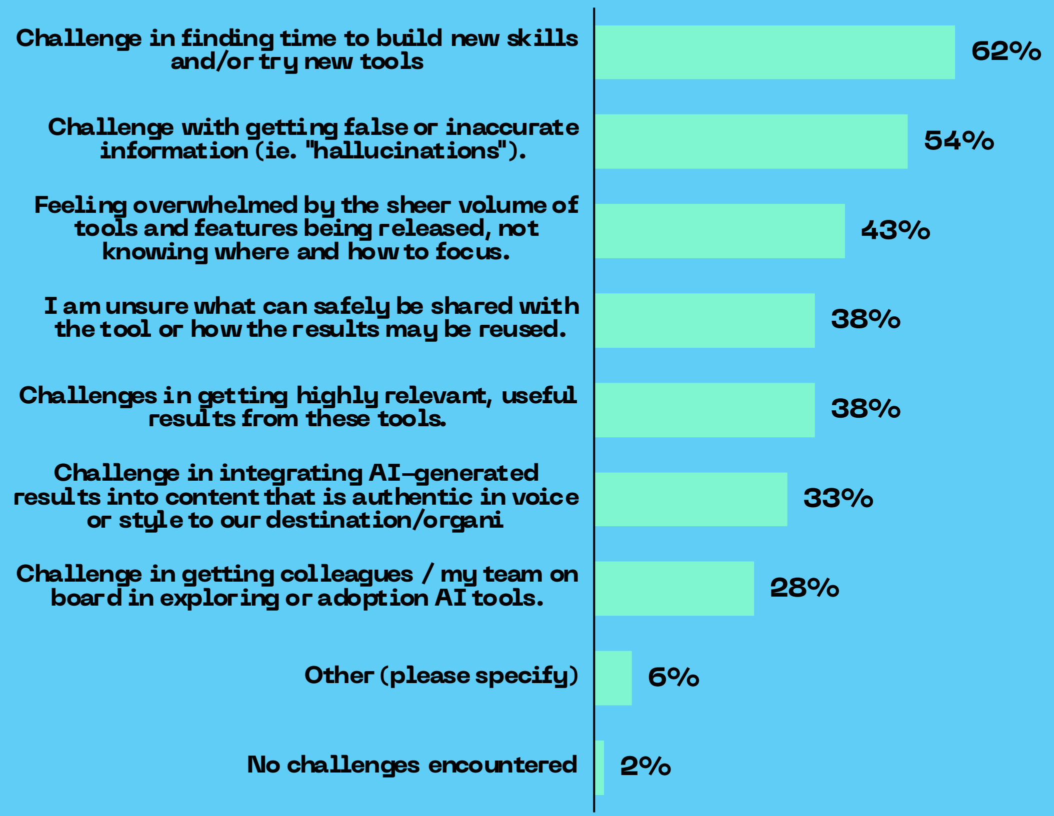
More experience, less time: 72% of those in their roles for 10+ years struggle to find time for AI, while the same applies to 50% of those with just 0-2 years in the role.

Unfamiliar users are less challenged by AI inaccuracy: Younger adults report challenges with inaccurate AI outputs, while those with low AI-familiarity report this as less of a challenges (37% vs. 54% overall).

IT struggles to engage the rest: 43% of IT/Digital team members find it difficult to engage colleagues in AI.

Authenticity is a communication challenge: 42% of communications & marketing professionals report challenges integrating AI-generated content authentically vs 33% overall.

CHALLENGES IN WORKING WITH AI



Q: What challenges, if any, have you personally encountered in working with AI models or tools? Choose all that apply.

n = 293

TOO MUCH AI TO TRY, TOO LITTLE TIME

REGARDLESS OF FAMILIARITY, THERE ARE MANY DIFFERENT CHALLENGES IN WORKING WITH AI

CHALLENGES IN WORKING WITH AI

FAMILIARITY WITH AI	Getting relevant, useful results from AI	Finding time to build new skills / try new tools	Feeling overwhelmed by volume of tools	Getting false or inaccurate information	Integrating AI-generated content that is authentic	Knowing what can safely be shared with AI	Getting colleagues on board with AI	No challenges encountered	Other (please specify)
Low	47%	57%	53%	37%	23%	40%	10%	0%	7%
Medium	38%	72%	43%	51%	36%	40%	12%	1%	10%
High	37%	59%	42%	58%	35%	38%	39%	2%	5%

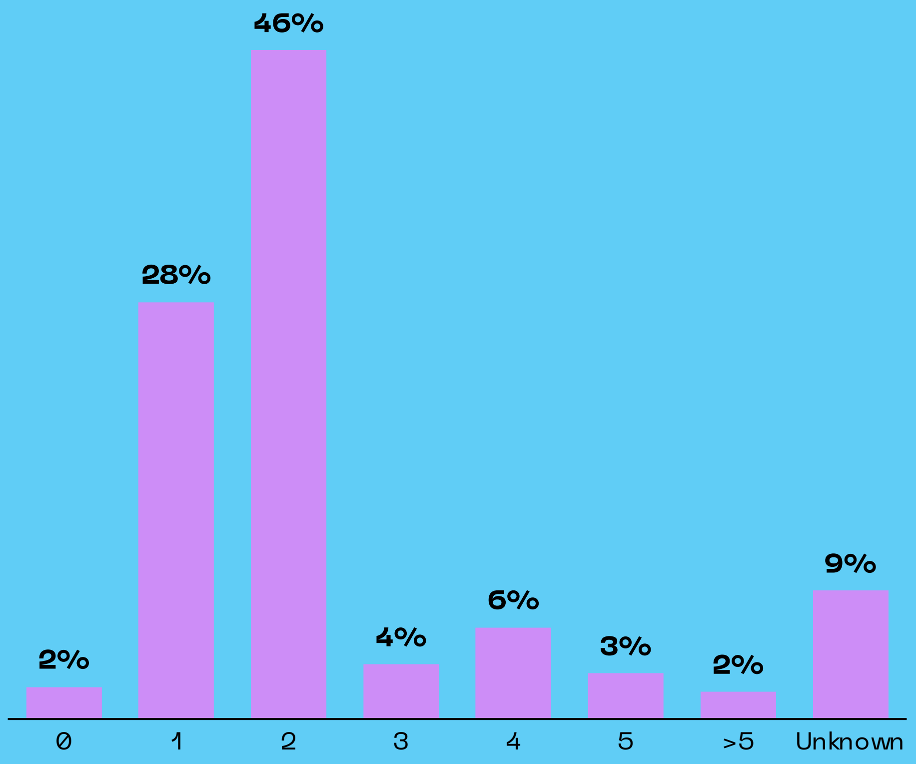
MANY TOOLS, FEW FAVORITES

Most respondents use one or two AI tools on a weekly basis: Half of respondents (46%) use two AI tools per week. 28% use just one tool. Only 18% use three or more AI tools. They're more likely men, IT/Digital team members, or AI-optimists. One in three women (33%) use just one AI tool, compared to one in five men (20%).

Newer employees tend to rely on fewer tools: While 28% of all respondents use only one tool, this rises to 42% among those with less than 2 years in their organisation

AI familiarity increases tool count: Among those with low AI familiarity, 57% use one tool, while among those with high familiarity, 78% use two tools or more.

TWO WEEKLY AI FAVORITES



Q: In general, how many different tools do you personally use over a week? Please estimate the number of AI tools you are using.

n = 298

WHAT?

- 58% now feel familiar or very familiar with AI (up from 38%); only 11% feel unfamiliar.
- Familiarity is strongest among IT teams (88%), senior roles, and North Americans, but drops with tenure and among older staff.
- 83% now use AI for writing and content creation, up from 31% in 2023, while non-users have nearly vanished (1%, down from 21%).
- Only 18% use three or more tools; most rely on one or two, showing that AI breadth remains limited.
- 62% cite lack of time as the top barrier, followed by tool overload and uncertainty about AI inaccuracy.
- Where AI strategies and clear processes exist, AI familiarity and enthusiasm are higher.

SO WHAT?

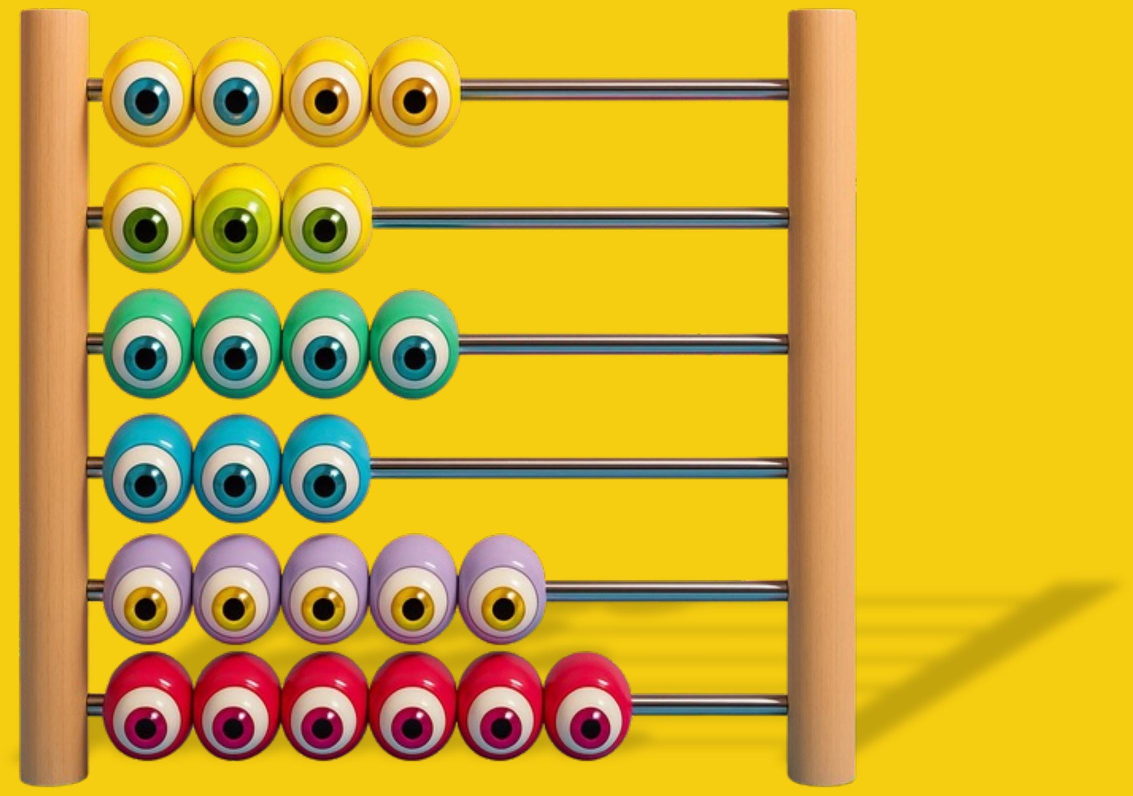
- **Start with clarity.** Publish a simple, living AI playbook; familiarity and enthusiasm correlates with structure.
- **Shift from use to capability.** Move beyond AI for simple writing to developing assistants, analytics, and workflow automation.
- **Protect time.** Leadership must ring-fence time for practice; don't leave upskilling to nights and weekends.
- **Build trust into the rollout.** Keep data privacy, ethics, and make guidelines visible and practical.

QUESTIONS TO ASK:

- *Where do we most need to free up time to turn curiosity and enthusiasm into skill?*
- *How can we turn uneven familiarity into a collective advantage?*
- *Which two indicators do we measure to track our AI progress?*

CHAPTER 2

TIME TO STRATEGISE



CHAPTER PREVIEW: Only 16% of destination professionals say their organisation has an AI strategy, and 12% aren't sure if one exists. Even among those with a strategy or developing one, 1 in 5 don't know what it includes. Where strategies do exist, AI-powered productivity and efficiency dominate over AI-powered services and products. This chapter unpacks what's behind the gaps in awareness, and what characterises the destination organisations with strategies in place.

AI STRATEGY DEFICIT

Strategy is still the exception: Only 16% of destination professionals say their organisation has an AI strategy. When we include those that are in the process of developing one, the number increases to 51%. 12% aren't sure if there is a strategy.

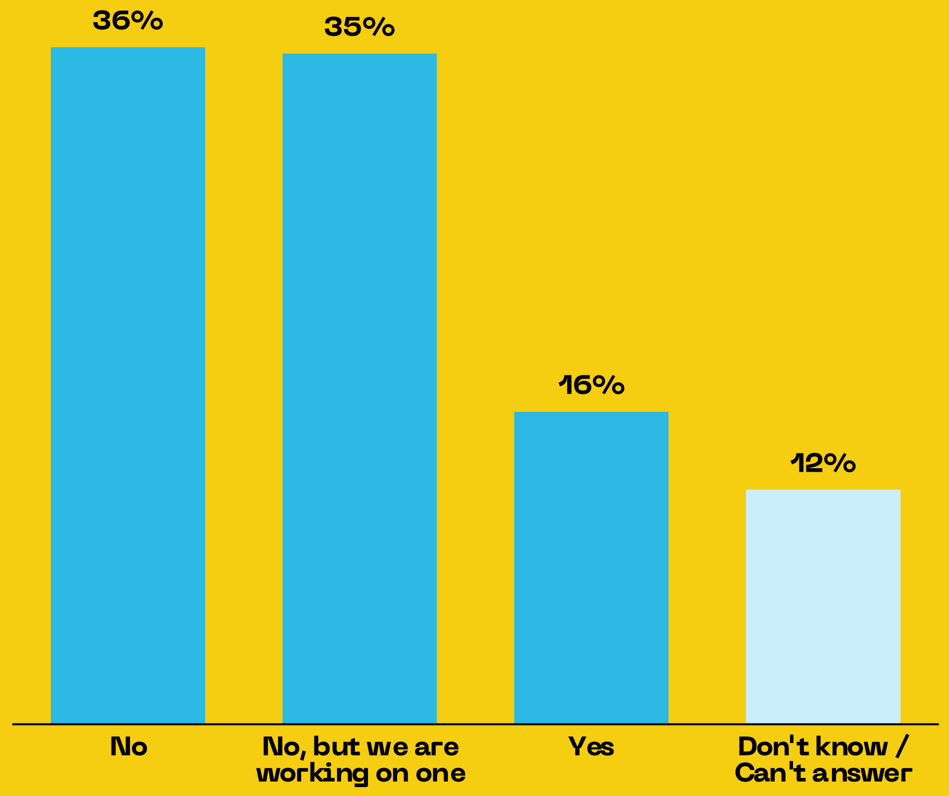
DMOs lead slightly: 19% of DMO employees report having an AI strategy, vs 15% in regional tourism organisations (RTOs) and 12% in national tourism organisations (NTOs).

Differing strategy awareness: 23% of top managers report having a strategy, vs. 11% of entry-level staff. 9% in Research/ Data/Insights say they have a strategy, vs 27% in IT/Digital.

Structure boosts strategy: Where clear internal AI adoption processes exist, 29% report having a strategy, compared to 12% in organisations without clear processes. Where colleagues are reported as AI-curious and engaged, the rate is 24%.

New staff often don't know: 23% of staff with ≤2 years in their organisation don't know whether an AI strategy exists. In contrast, none of the top managers express uncertainty about whether a strategy exists or not.

VAST MAJORITY DON'T HAVE AN AI STRATEGY IN PLACE



Q: Does your organisation have an AI strategy today? *n = 291*

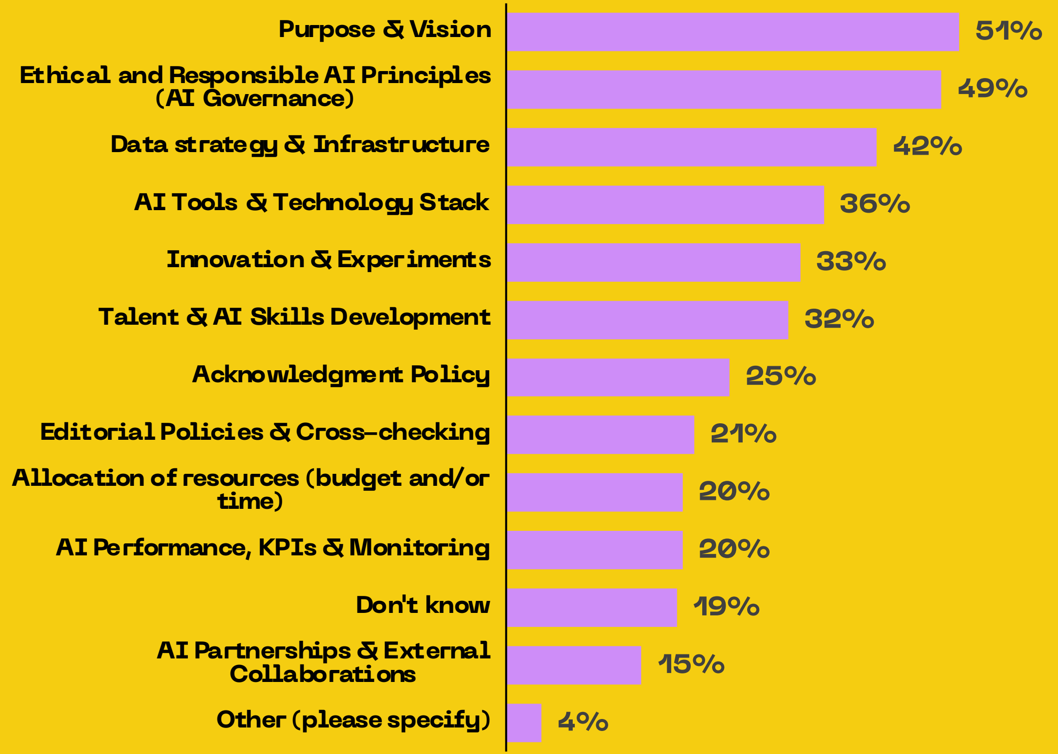
THE ELEMENTS OF AI STRATEGY

Even the basics aren't universal: Only 51% of destinations' AI strategies include purpose and vision, and 49% include ethical or responsible AI principles. These are the top two elements across the reported AI strategies, but these elements are still only included in half of the strategies.

Many don't know what's in their strategy: Among the respondents from destination organisations with an AI strategy or working on one, 19% don't know what it includes. The share is highest among DMO staff (25%) and lowest in RTOs (5%). Uncertainty is also higher among those concerned about AI in tourism (31%).

Clarity drives content: Among organisations with clear internal AI processes, 68% have included purpose and vision in their strategy. This drops to 38% where internal processes are unclear. The same pattern appears for leadership: 64% include purpose and vision where AI is perceived a strategic priority vs. 32% where it isn't.

KEY ELEMENTS INCLUDED IN DESTINATIONS' AI STRATEGIES



Q: To your knowledge, which of the following aspects are included in your organisation's AI strategy? Choose all that apply. *n = 151*

THE ELEMENTS OF AI STRATEGY

Strategic AI clarity and AI familiarity go hand in hand: The cross-data between those with high and low AI familiarity for elements included in the AI strategies suggests that clarity is closely connected with familiarity: Those with high AI familiarity seem to report stronger strategic clarity in terms of AI purpose and vision, data strategy and infrastructure, and ethical and responsible AI principles. This could of course also be because those with high AI familiarity also have stronger understanding of the strategic elements involved.

ELEMENTS INCLUDED IN AI STRATEGY

FAMILIARITY WITH AI	Purpose & Vision	Data Strategy & Infrastructure	AI Tools & Technology Stack	Talent & AI Skills Development	Ethical and Responsible AI Principles	AI Performance, KPIs & Monitoring	AI Partnerships & External Collaborations	Editorial Policies & Cross-checking	Acknowledgment Policy	Allocation of resources (budget, time)	Innovation & Experiments	Don't know	Other (please specify)
Low	29%	29%	21%	21%	21%	7%	14%	14%	0%	0%	14%	43%	0%
Medium	33%	33%	35%	28%	44%	16%	7%	14%	16%	16%	21%	33%	2%
High	64%	49%	40%	35%	57%	24%	20%	26%	34%	25%	42%	9%	5%

EFFICIENCY FIRST, INNOVATION NEXT?

Efficiency dominates strategy: 77% cite productivity and efficiency as the main drivers of AI strategy. The figure is higher among NTO employees (90%), and in organisations where AI is reported as a leadership priority (89%), as well as among top managers (88%).

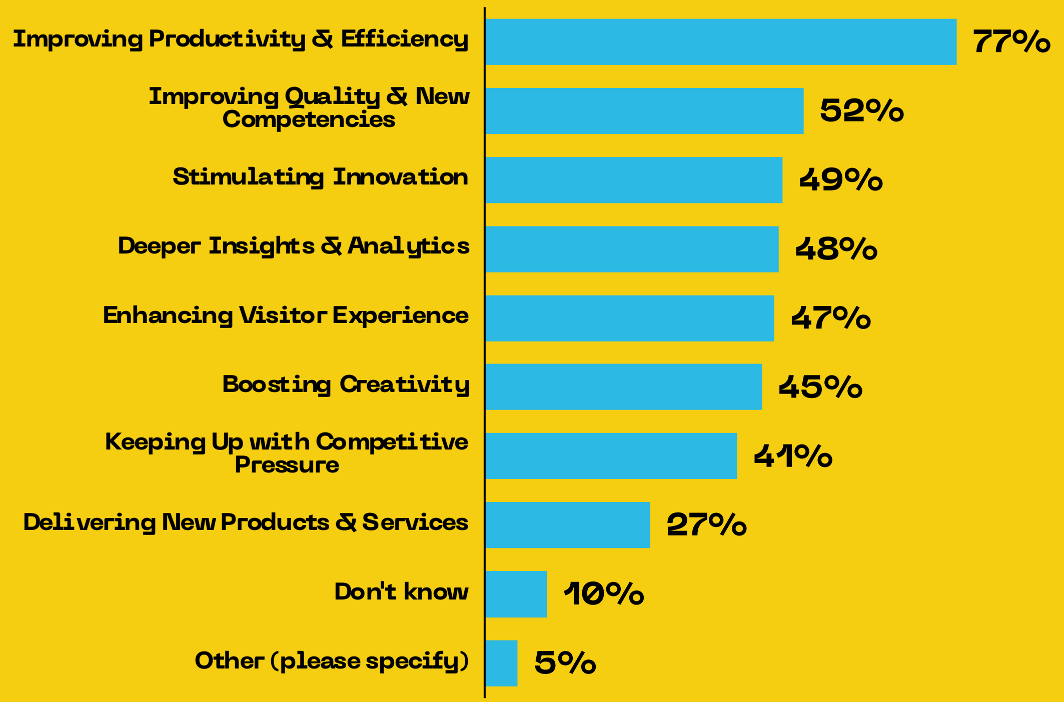
North America pushes insight and innovation: North American destination organisations are more driven by deeper analytics (61% vs. 43% in Europe) and innovation (61% vs. 46%, respectively).

New product development plays a minor role: Only 27% say their AI strategy aims to deliver new products or services, and 10% don't know the strategic purpose at all.

Seniority broadens purpose: The more senior the role, the wider the range of strategic motivations for AI.

Innovation goals are strongest in tech and development: 68% of IT/Digital staff and 60% in Innovation/ Development highlight stimulating innovation as a key objective, compared to just 45% overall.

PRODUCTIVITY AND EFFICIENCY ARE TOP STRATEGIC PRIORITIES FOR AI IN DESTINATIONS



Q: What is your organisation's strategic purpose and motivation for AI adoption? Choose all that apply.

n = 148

WHAT?

- Only 16% of destination professionals say their organisation has an AI strategy. 12% aren't sure if one exists.
- 35% are working on a strategy. 36% don't have one and are not working on one.
- Strategy awareness grows with seniority (23% of top managers vs 11% of entry-level staff), but clarity remains uneven: 1 in 5 don't know what their strategy includes.
- Most strategies focus on efficiency (77%), far less on innovation (49%) or new products (27%).
- Only half of existing strategies include basic elements like purpose, vision, or ethical principles.
- Those respondents with higher AI familiarity also report stronger strategic clarity.

SO WHAT?

- **Strategy lags behind enthusiasm.** AI has moved fast, structure hasn't caught up.
- **Efficiency is top priority.** Balance cost-saving with innovation and new value.
- **Clarity scales confidence.** A visible, living strategy creates shared language and reduces uncertainty.
- **Purpose first.** Half of strategies still miss a guiding vision. You could need it to link today's efficiencies to tomorrow's transformation.
- **QUESTIONS TO ASK:**
- *Does everyone know what's in our AI strategy – or only a few at the top?*
- *Have we defined the purpose and responsible principles that guide our AI decisions? Could we involve the rest of the organisation in this?*
- *How can we not only focus on automating tasks but also designing better (more innovative) outcomes?*

CHAPTER 3

DESTINATIONS' AI ADOPTION

CHAPTER PREVIEW: ChatGPT leads the toolbox, named by 68%, followed by Copilot 37%, Claude 14%, and Gemini 11%. In practice, most are still piloting: 24% have internal agents, only 4% offer external ones; 19% run chatbots, 11% use AI-generated content, and 5% run campaigns or trip planners. This chapter looks into the current state of destinations' AI adoption – and the differences in adoption within organisations.

ONE MODEL DOMINATES

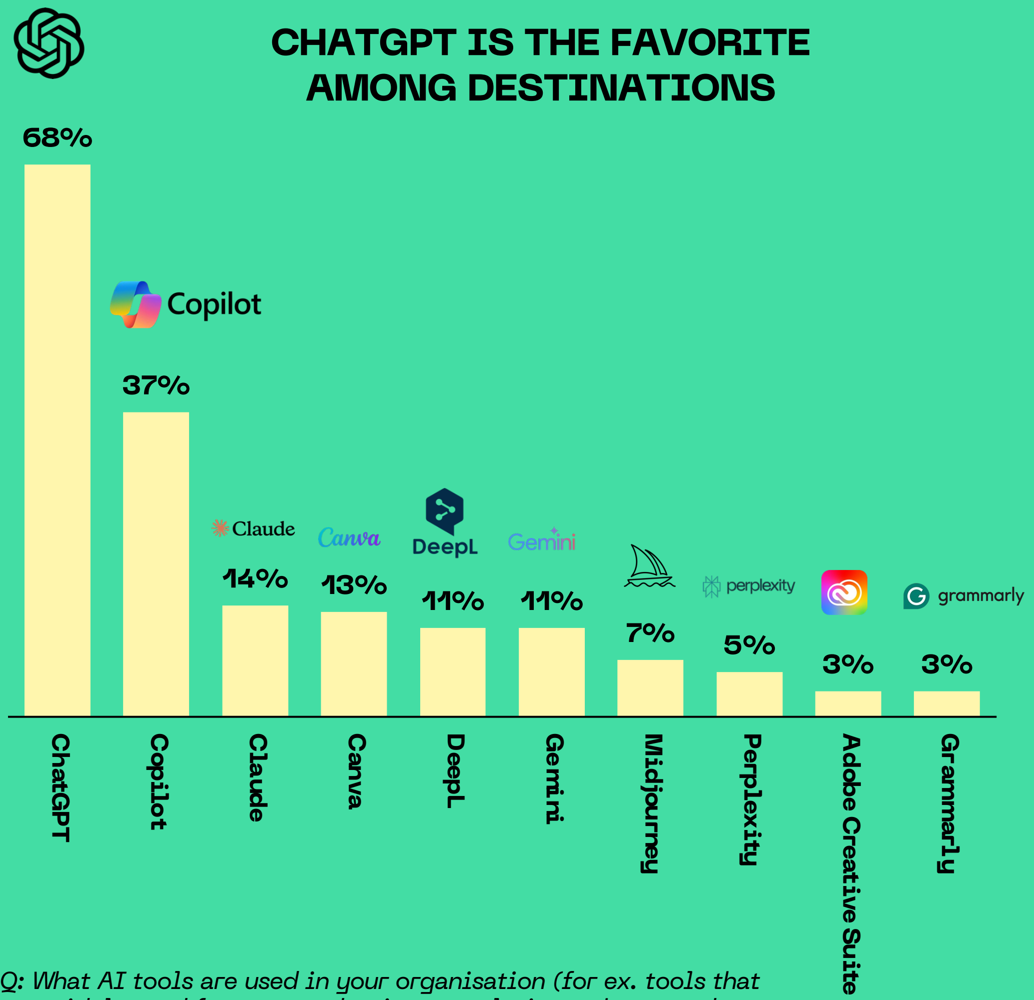
ChatGPT dominates the field: Over two-thirds (68%) of respondents mention OpenAI's ChatGPT, making it the clear front-runner among AI models and tools.

Other large language models lag behind: Claude (14%), Gemini (11%), and Perplexity (5%) are far less commonly used among destination organisations. The European LLM Mistral is mentioned by just one respondent.

General tools top the list: The most cited tools are broad-use tools and models. More specialised tools like Canva (presentations, graphics), DeepL (translations), and Midjourney (images, video) appear much further down the list.

Copilot holds second place: Microsoft's Copilot – powered by ChatGPT – is used by 37% of organisations — well behind ChatGPT, but far ahead of other models and tools.

CHATGPT IS THE FAVORITE AMONG DESTINATIONS



Q: What AI tools are used in your organisation (for ex. tools that are widely used for text production, translations, photos and graphics, data, meeting summaries etc.)? List as many as relevant.

n = 257

AI IS KEPT MOSTLY INTERNAL

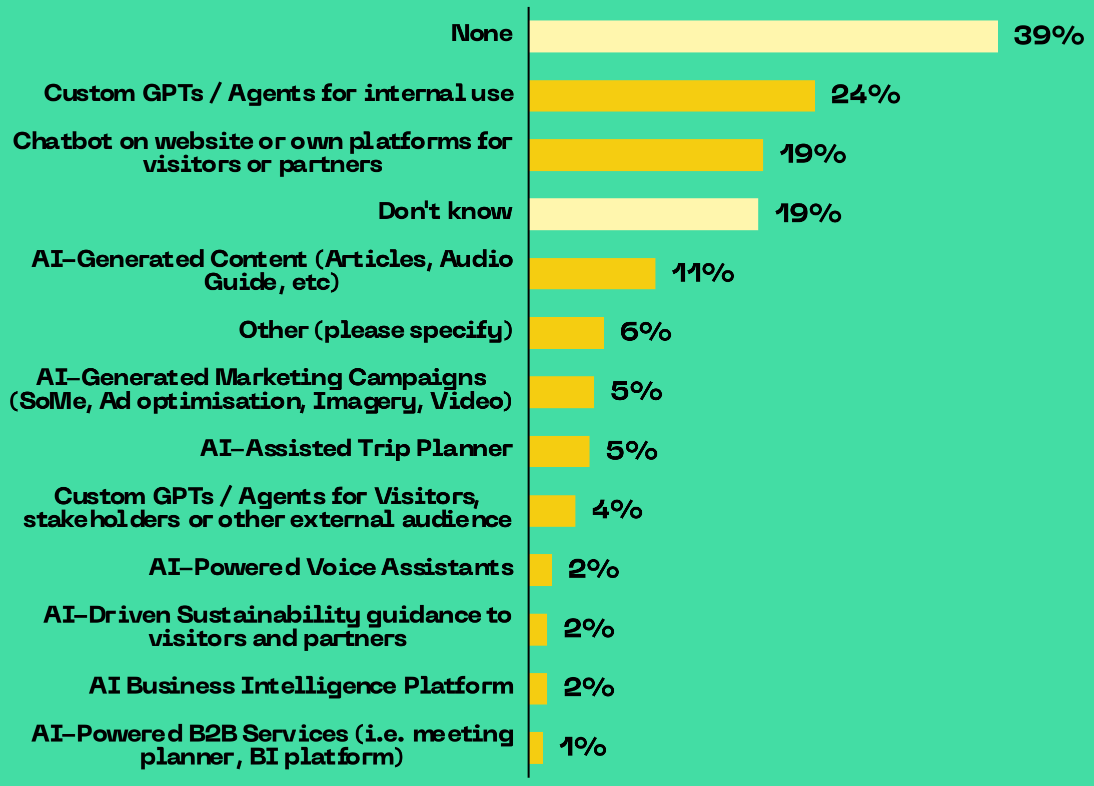
Few AI services launched: 39% of destination organisations haven't launched any AI services, neither internally nor externally (44% of RTOs and 26% of NTOs). Among those with an active AI strategy, only 22% report no services launched. 24% have developed custom GPTs or AI agents for internal use, while only 4% have done so for external audiences.

CustomGPT uptake: Top managers are more likely to have developed a CustomGPT (35%) than entry-level staff (15%). 0% with low AI familiarity have built one, while 31% with high familiarity have. For organisations with an AI strategy, 46% have developed CustomGPTs, while it's 40% of those from organisations, where AI is a leadership priority vs. 12% in organisations, where it is not.

One in five have launched a chatbot: 19% have launched a chatbot. 11% have introduced AI-generated content, and just 5% report using AI-assisted trip planners or AI-driven marketing campaigns.

North America slightly ahead: North American and European DMOs are broadly similar in adoption, but North Americans lead on chatbot use (25% vs. 18%) and internal agents (30% vs. 23%).

VERY FEW EXTERNAL AI SERVICES & PRODUCTS LAUNCHED



Q: Has your organisation launched any of the following AI services for external and/or internal use?

n = 257

ONLY FEW POWER USERS

AI use is still limited to a few: 60% agree that only a small group of colleagues use AI tools. Agreement is even higher among those that report their organisation has unstructured AI-upskilling (69%), unclear internal processes (71%) and having data privacy concerns (70%).

Data privacy concerns are widespread: 43% overall express concerns over privacy issues, but the concerns are lower among those with low AI familiarity (28%). It could seem that the less familiar, the less concerned.

Colleague curiosity varies by group: Overall, almost half think their colleagues are curious about AI. The percentage peaks among those with an AI strategy (67%).

Men and managers see more integration hurdles: More men than women report seeing challenges with AI integration (55% vs. 40%, respectively). NTOs (58%), RTOs (51%) and top managers (54%) also perceive these integration challenges more significantly.

Most feel unprepared: Across the different statements, many respondents *disagree* that their organisation has an AI strategy, has AI clarity, structure or skills. All these score under 3.0 on average (on a scale from 1–5).

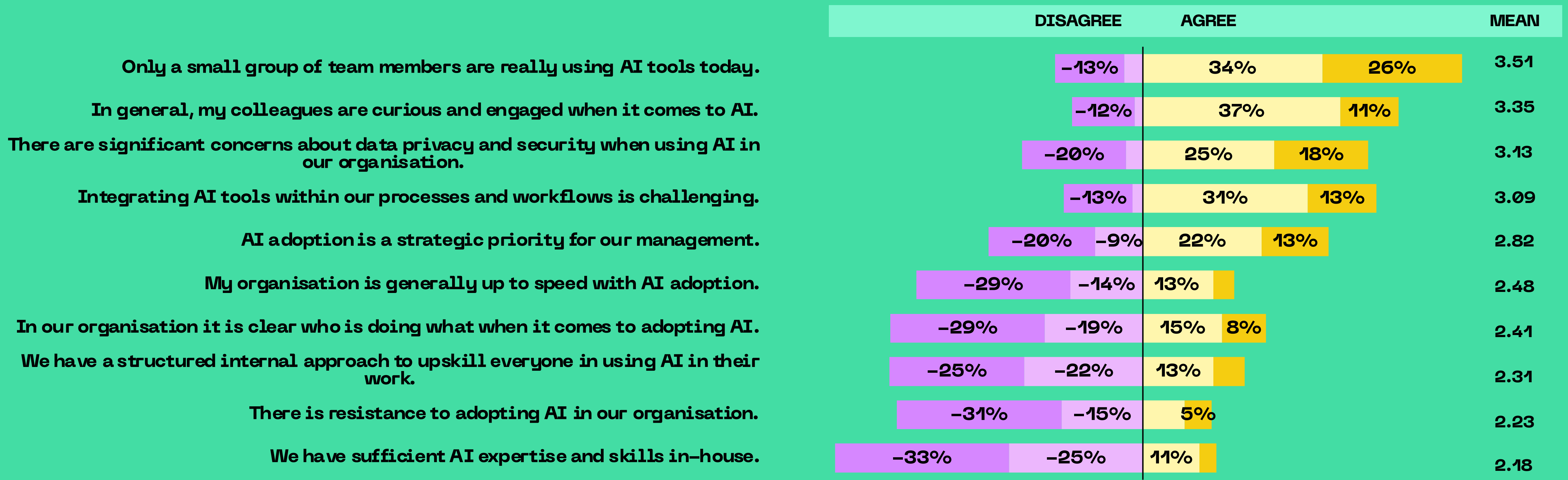
Structured upskilling is rare: Only 17% of Europeans and 29% of North Americans report that their organisation have structured upskilling for AI. Interestingly, it increases with seniority (30% for top managers, 13% for entry-level) and for organisations with overall AI strategies in place (44% vs. 13% in those not having one). Just 4% of low-familiarity users report that their organisations offer structured upskilling for AI.

Few feel their organisation is "up to speed": Overall, only 17% of destination professionals feel their organisation is up to speed with AI. Only 13% overall agree that colleagues resist AI. Taking into consideration that this survey also shows vast AI enthusiasm, one could guess that there must me some impatience in 'getting moving' from within organisations.

AI competencies lacking: 58% say their organisation lacks AI expertise. This number is higher in NTOs (71%). It drops to 39% for organisations with clear AI processes but increases to 74% in organisations without them. Where AI is a leadership priority, only 46% report lacking competencies in the organisation, vs. 67% where it is not.

CURIOUS COLLEAGUES, SLOW ORGANISATION

AI ADOPTION LIMITED WITH SKILLS AND STRUCTURE LACKING



Q: Please let us know if you agree or disagree with the statements below about AI adoption in your organisation. (Note that answers 'Don't know' & 'Neither Disagree nor Agree (3)' have been excluded from the dataset.

n = 254

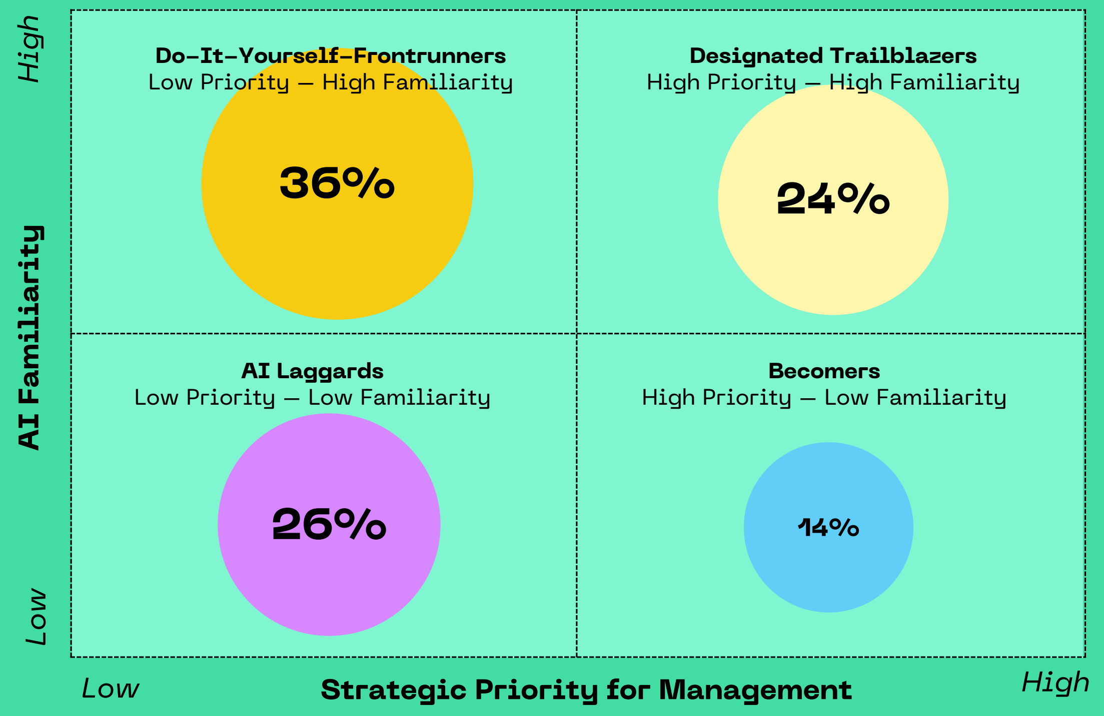
THE PARADOX OF HIGH FAMILIARITY AND STRATEGIC PRIORITY

A closer look across the dataset reveals a paradox between those that rate themselves high in terms of AI familiarity and their perception of organisational leadership's strategic priority of AI.

The cross-analysis shows that high AI familiarity doesn't equal high strategic priority from the organisation's leadership — in fact, it indicates the opposite, potentially pointing to a more bottom-up situation, where the individual familiarises itself with AI before the organisation catches up. The opposite case, where individual skills or familiarity need to catch up with organisational priority, is less prevalent (14% as seen in the chart to the right).

Mapping respondent familiarity against perceived organisational priority reveals four categories of respondents: From DIY Frontrunners (36%), highly AI-familiar in low-priority organisations. Trailblazers (24%), with both high individual familiarity and high organisational priority. Becomers (14%), with low familiarity, but high organisational priority, and Laggards (26%) of low familiarity and low priority.

PARADOX: HIGH FAMILIARITY, LOW STRATEGIC PRIORITY



WHAT?

- ChatGPT dominates: Named by 68% of respondents, Copilot (37%), Claude (14%), and Gemini (11%).
- Most AI use stays internal: 24% have built custom GPTs or internal agents; only 4% have external-facing AI services or solutions. 39% of destination organisations have yet to launch any AI services at all.
- Skills and structure lag: 58% say their organisation lacks AI expertise; only 17% in Europe and 29% in North America report structured upskilling in their organisations.
- 60% agree that only a small group uses AI. Half agree that their colleagues as curious and engaged — this increases to 67% for those in organisations with an AI strategy in place.
- Paradox: High individual familiarity doesn't equal high organisational strategic priority.

SO WHAT?

- **Adoption is uneven.** Enthusiasm is high, but structured rollout is not. Upskilling is the missing bridge. Without time and structure, a few become power users while most stay on the sidelines.
- **Internal first is fine,** but in time, internal pilots should evolve into real visitor- and partner-facing applications.
- **Observe the paradox.** Individuals appear to move faster than the organisation; with high familiarity and high enthusiasm, slow decision-making and organisational pace could create frustration and fragmentation from within.

QUESTIONS TO ASK:

- *In your DMO, who is leading AI adoption - individuals or the organisation?*
- *What's your next step beyond internal pilots and experiments? Could we work with our stakeholders and destination partners to develop together?*
- *How do we turn individual enthusiasm into shared, structured capability?*

CHAPTER 4

AI POTENTIALS AND RISKS

CHAPTER PREVIEW: Destination organisations point to lack of skills, strategy, and data privacy concerns as the main barriers to AI. These worries are strongest among top managers, long-tenured staff, and teams without a clear plan. Where an AI strategy or launched services exist, barriers fall, and few see unreliable output or cost as major obstacles. Even so, most expect AI to reshape daily work and visitor behaviour in the year ahead, however with worries about authenticity and control.

GAPS IN AI EXPERTISE

Top concerns are clear: The top three challenges for AI adoption are lack of AI strategy (58%), lack of expertise and skills (57%) and data privacy/security concerns (55%), pointing to gaps in structure and capability.

Lack of strategy felt most at the top: Overall, 58% see a lack of AI strategy in their organisation. 70% of top managers, 67% of those in Research/Data/Insights, and 66% of long-tenured staff (10+ years) report lack of strategy as a barrier for AI adoption.

Strategy and process ease concern about skills: Concern over AI skills is lower among those with an AI strategy (36%) and lowest among those with clear internal adoption processes (31%).

Concern differs between genders: Men are more likely to raise issues around cost and expertise, while women point to ethical concerns, customer trust, authenticity and policy gaps. 62% of women cite privacy/security concerns vs 37% of men.

... Also, a lack of tech skills with top management is a hindrance as they do not see the investment / resources needed to implement AI tools in the organisation as well as changing the working culture.

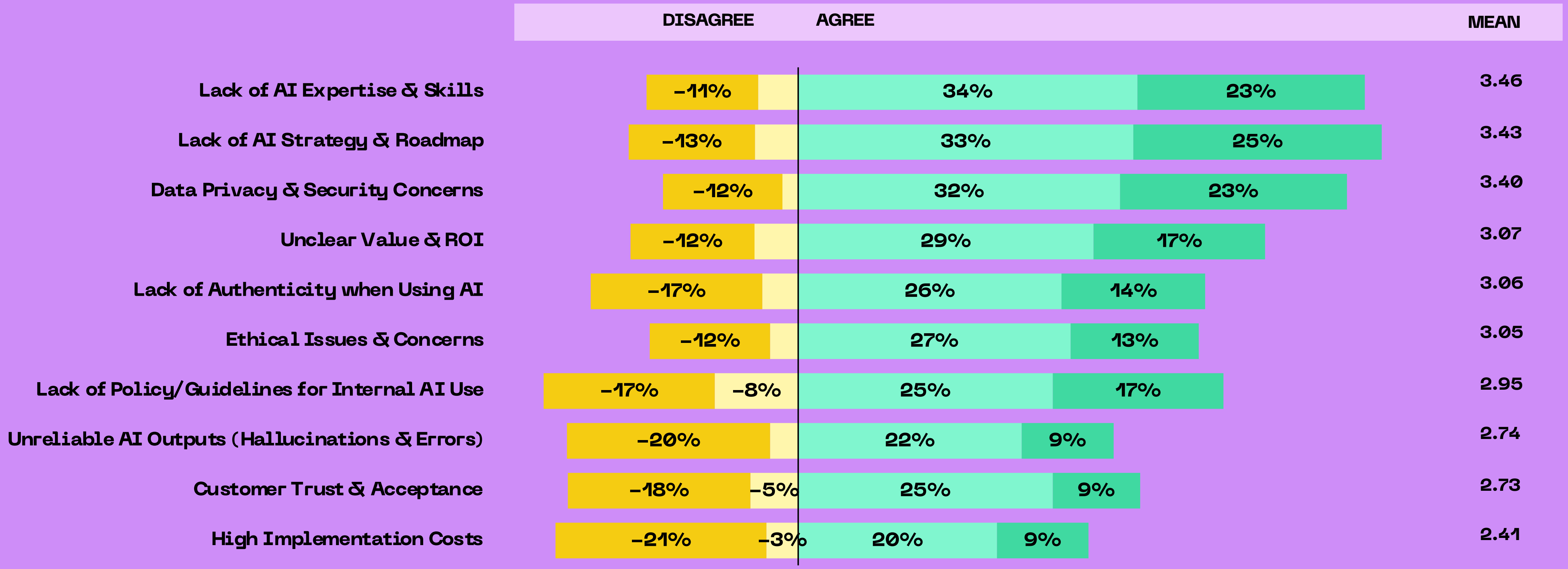
... Individual behaviours and resistance to changing the way we work. Some of us are trailblazers, while others are still not using Office 365 consistently .

[We] need better funding and strategy to be able to test and really get this going

Q: Open answers to what is holding respondents and their organisations back in the process of adopting AI

CHALLENGES & BARRIERS

LACK OF SKILL AND STRATEGY AS MAIN BARIERS



Q: What challenges and barriers do you see for AI adoption in your organisation? Note that answers 'Don't know' & 'Neither Disagree nor Agree (3)' have been excluded from the dataset.

n = 253

VALUE, NOT COST

No strategy, more doubt about ROI: Uncertainty about AI's value and ROI is reported by 47% of those without a strategy, and by 36% of those with a strategy already in place.

Action reduces fear: Interestingly, those who have actually launched AI services and solutions of any kind report fewer barriers. In contrast, those that haven't launched anything generally report more barriers and challenges, particularly when it comes to challenges and barriers regarding data privacy/security and lack of a strategy.

It's not really about the money: High implementation costs is ranked low as barrier across all respondent groups (below 3). Still, 35% of highly AI-familiar respondents agree it's a barrier (vs. 29% overall), while the same applies for only 19% of low-familiarity respondents. IT/Digital staff report the highest concern about cost at 45%.

Not enough workforce and time to review possible AI implementations.

No time to educate and to develop an appropriate way to use in our service.

Personally, I am interested but easily annoyed when results are inconsistent. Feels like with limited time, there is no time to waste on trial and error with AI.

Q: Open answers to what is holding respondents and their organisations back in the process of adopting AI

HIGH EXPECTATIONS FOR THE FUTURE WITH AI

AI impact seen as inevitable: The two highest-rated statements in the entire survey relate to AI's expected impact on daily work (avg. 4,12 on a five-grade scale) and on consumer behaviour (avg. 4,07).

High expectations are strongest among top managers and in North America: Expectations for AI's impact on destination management and marketing are highest among North Americans (89%), top managers (89%), and in the organisations with an AI strategy (93%).

AI seen as a value driver: 72% believe AI can create more value for visitors and stakeholders. IT/Digital staff are, perhaps not surprisingly, most convinced (86%), more than Innovation/Development roles (73%).

Automation expectations are high: 67% agree with the expectation that AI will automate many administrative tasks. Only 54% of low AI-familiarity respondents agree, vs. 79% of high AI-familiarity respondents.

... visitors will use more and more AI tools to plan and book their trip. It will be a challenge to provide them with the correct information about our destination since AI will search for information on different sources that we can not control.

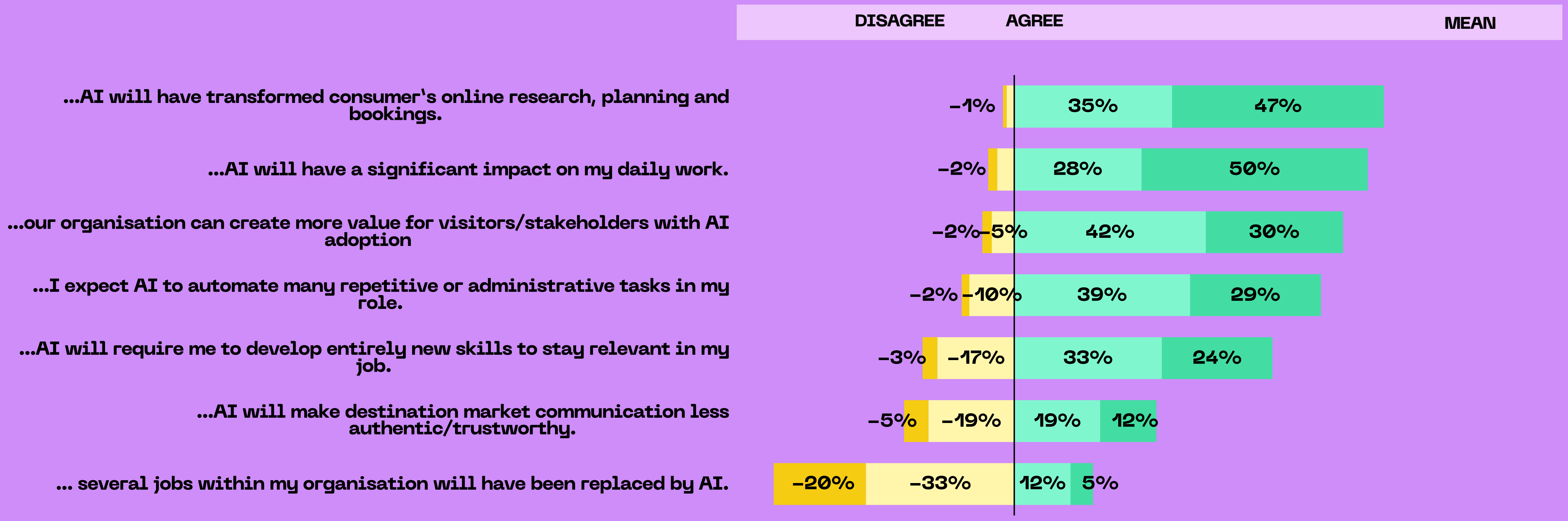
I believe that content creation using various tools such as ChatGPT, Midjourney, DALL·E and others will become much faster, more cost-effective and easier.

I'm afraid it will be the same as I've already seen –more text clearly written in ChatGPT and therefore making place-branding too similar and not authentic.

Q: Open answers to what emerging AI trends or technologies respondents believe will have the greatest impact on destination marketing and development in the next 12 months

HIGH FUTURE EXPECTATIONS

EXPECTATIONS FOR AI TO TRANSFORM CONSUMER BEHAVIOR AND DAILY WORK



Q: How do you see AI in the future of your work and in tourism in general? Note that answers 'Don't know' & 'Neither Disagree nor Agree (3)' have been excluded from the dataset.

n = 242

HIGH FUTURE EXPECTATIONS

Trust in content authenticity is mixed: 31% agree AI will reduce authenticity of marketing communication. Respondents without strategies agree more with the threat to authenticity (38%), while 26% of respondents from organisations with AI as leadership priority agree that AI will impact authentic and trustworthy communication negatively.

Job replacement seen as unlikely: Just 17% believe AI will replace many jobs. North Americans are the least concerned (9%) with job replacement vs 19% of Europeans.

Men are more confident about the future with AI: Across all forward-looking statements, men show stronger and more consistent agreement than women, especially around AI's potential for efficiency and rationalisation.

AI tools to plan and book actual trips will be the new shiny thing.

The disruption of travel planning will make the DMO website obsolete if it doesn't adapt.

AI-powered Chatbots and Virtual Assistants: To provide 24/7 support to visitors, helping them plan their visits, suggest attractions, and answer queries, thereby enhancing the overall visitor experience.

Q: Open answers to what emerging AI trends or technologies respondents believe will have the greatest impact on destination marketing and development in the next 12 months

AI IS WORK IN PROGRESS FOR DESTINATIONS

Answering the open question of what AI projects and initiatives the destination organisations are working on right, the majority shared work-in-progress within the below categories...

Chatbots & Assistants

Trip Planning: *Several respondents are developing AI-powered trip planners and recommendation systems.*

Workflow Automation: *Many are implementing AI to streamline administrative tasks, meeting summaries and repetitive processes.*

Custom GPTs and Specialised Agents: *Organisations are creating tailored AI solutions for specific internal use cases and industry needs.*

Content creation & optimisation

Many use AI for writing, social media content, translating, and optimising across platforms.

Some are preparing their databases and content to be AI-ready and searchable by AI systems.

Data analysis

Several report working on AI-powered analytics to understand visitor behaviour, track performance metrics, and make data-driven decisions.

Strategic initiatives

Many are in the process of creating organisational AI policies, strategies and training programmes for internal teams, in fact, numerous organisations are implementing AI literacy programmes and workshops for their teams.

Q: Open answers to what their organisations are working on right now in terms of AI initiatives.

WHAT?

- Barriers are more structural, not technical. Top challenges are lack of AI strategy (58%), lack of expertise and skills (57%), and data privacy concerns (55%). 70% of executives cite lack of strategy as a barrier, compared to 58% overall.
- Concern about skills falls to 31% in organisations with clear internal adoption processes.
- Women are more concerned about privacy and ethics; men point more often to cost and technical barriers.
- Less than one in three see costs as a major issue; the main constraint is time and internal capacity.
- 89% of top managers and 93% of those with an AI strategy believe AI will reshape their work.
- Trust and authenticity are under pressure. 31% fear AI will make market communication less authentic, especially those without an AI strategy in place.
- Few fear job loss. Only 17% expect AI to replace roles.

SO WHAT?

- **Data privacy and authenticity** will define long-term trust in destination marketing.
- **Leadership by doing and prioritising.** Lack of support and skill at the top slows progress across the organisation, even when tools are available.
- **Time is the real currency.** Without dedicated time for testing and reflection, enthusiasm could decrease.
- **Expectation outruns readiness.** AI will reshape destination operations and the traveller journey, so destination organisations must change to meet their own expectations.

QUESTIONS TO ASK:

- *What would it take to make AI safe, trusted, and transparent in our organisation?*
- *How do we turn enthusiasm and optimism into operational readiness?*
- *Which fears at the top are slowing innovation below?*

YOUR OWN AI BENCHMARK

Your own AI-powered benchmark report: By scanning this QR code or following this link: https://ai-opener-pulse.lovable.app/, you will be able to benchmark your own destination organisation against the results of the AI Opener for Destinations Survey (2025).

As you go through the questions to receive your very own benchmark, your responses will be compared to the general results of the AI Opener 2025 survey and report.

In the end, you will be given the opportunity to download your benchmark results with suggestions for next steps.

In the spirit of the AI Opener for Destinations programme, the Benchmark mini-site has been vibecoded using ChatGPT and Lovable.dev.

APPENDIX 1: COMPILED RESPONDENT GROUPS

Apart from obvious groupings (such as gender, departments, geography, etc.), some respondent groups have been merged for statistical reasons (to get more stable respondent groups). These are defined below.

Some respondent groups are linked to one single answer (no compilation) and is shortened in writing. An example is "AI enthusiasts" referring to respondents that "feel enthusiasm about AI's overall impact on the tourism industry" (Q12).

RESPONDENT GROUP	N	QUESTION	MERGED ALTERNATIVES
DMOs	179	Q2	DMO + City/Municipality
RTOs	47	Q2	State/Provincial + RTO + County/Rural
Entry Level	86	Q5	Beginner + Intermediate
Middle Level	137	Q5	Group Leader/Project Manager + Middle Management
Young Adults	113	Q6	20-29 + 30-39 years old
Older adults	78	Q6	50-59 + 60+ years old
Low AI Familiarity	29	Q9	1 + 2
High AI Familiarity	162	Q9	4 + 5
AI is not a Strategic Priority for Management	73	Q20, statement b	1 + 2 (Disagreeing)
AI is a Strategic Priority for Management	86	Q20, statement b	4 + 5 (Agreeing)
Having Engaged and Curious AI Colleagues	121	Q20, statement c	4 + 5 (Agreeing)
Unstructured Approach to AI Upskilling	120	Q20, statement e	1 + 2 (Disgreeing)
Insufficient AI Expertise Inhouse	143	Q20, statement h	1 + 2 (Disagreeing)
Significant Concerns about Data Privacy and Security	105	Q20, statement i	4 + 5 (Agreeing)
Unclear Internal Ways for Working for AI Adoption	118	Q20, statement j	1 + 2 (Disagreeing)
Clear Internal Ways for Working for AI Adoption	57	Q20, statement j	4 + 5 (Agreeing)

OH NO, YOU FINISHED READING ALREADY?

Don't worry. There is much more to explore on www.aiopenerfordestinations.com. Reach out to NAO@groupnao.com to learn how you can join a global community of destinations exploring the impact and potential of AI.

AI Opener for Destinations is initiated and designed by Group NAO – a Copenhagen-based global innovation company that charges transformative agendas across industries and sectors. We believe that the complex problems of today require playful creativity and courage to seek inspiration outside familiar territory. See more on www.GroupNAO.com.