

Press Release

AI Momentum Builds Across Europe's National Tourism Organisations

- National Tourism Organisations across Europe are already seeing AI reshape day-to-day work.
- Marketing functions are leading AI experimentation, while research teams are calling for clearer direction and tailored support to unlock full potential.
- Positive staff enthusiasm meets skill shortages and strategy gaps, calling for structured experiments and targeted training.

Brussels, 4 September 2025: The rapid development of emerging technologies is reshaping industries around the world, including the tourism sector. The European Travel Commission (ETC) has today published the findings of its European mapping study on artificial intelligence use within National Tourism Organisations (NTOs).

This spring, ETC members completed a comprehensive survey covering AI adoption, its benefits, and governance and investigating two factors: the readiness of national tourism boards for long-term success deploying AI, and current observed gains from AI use. This report was conducted by Kairos Future – an internationally operating futures research and strategy consultancy – which has been working with AI-driven analytics with ETC since 2010.

The study finds that AI is already reshaping day-to-day operations across Europe's National Tourism Organisations. A handful of European destinations have emerged as early adopters, high in readiness and perceived AI usefulness, reporting tangible productivity and quality gains. Significant insights from the study include:

- **Early movers, many testers** – A small cadre of NTOs act as early adopters, while the majority run short-term pilots designed to gauge feasibility rather than embed AI operationally.
- **Staff on board** – Employee sentiment is consistently favourable, with curiosity high and overt resistance low.
- **Marketing leads the way** – Marketing teams report clearer use-cases (such as automated content generation) and therefore higher maturity scores than research departments, who consider the technology useful but still exploratory.
- **Tailored investment could help drive usage** – Limited AI expertise, sparse training and the absence of a roadmap are some of the main barriers, with marketing teams also highlighting tighter budgets.

Practitioners in marketing report more immediate, visible value than research teams, with 72% of departments citing its use in copywriting. Marketing departments have also noted its usefulness in streamlining internal processes, such as brainstorming and testing content formats. While researchers tend to consider the technology exploratory, 72% of NTO's state that AI is valuable for desk research and used in areas like sentiment analysis, translation, coding, and transcriptions.

The report also focuses on how such technologies can be successfully applied within tourism marketing and research functions. It shares lessons from early adopters, outlines potential risks, and presents practical recommendations tailored to the specific context of NTOs. The following steps are recommended for the further development of AI adoption:

1. **Ring-fence time to experiment** – Hackathons, innovation sprints and workshop days let teams translate enthusiasm into concrete prototypes.
2. **Prioritise role-specific up-skilling** – Facilitate tailored courses, with internal early adopters as peer instructors, instead of generic awareness sessions.
3. **Scale budgets in line with results** – Incremental funding tied to pilot outcomes will help convert proof-of-concepts into sustained operations.

Commenting on the findings, **ETC President Miguel Sanz** said:

AI offers new opportunities for Europe's National Tourism Organisations to enhance their operations, particularly in areas like marketing and research. What we are seeing is a wave of experimentation driven by real enthusiasm, but also shaped by uneven capacity across organisations. This is why it is so important to create spaces for shared learning, build practical skills, and support structured innovation. The insights in this study aim to help NTOs confidently navigate this evolving landscape and unlock the value of AI for smarter, more responsive, and more resilient tourism strategies.

The report provides European NTOs with clear, practical tools to make the most of AI – from roadmaps for marketing, research and organisational use, to simple do's and don'ts, real-world case studies, and an overview of upcoming rules like the EU AI Act. It also offers a future outlook, reviewing trends and three scenarios for knowledge work in the next decade. To build on this, ETC will continue supporting members with hands-on workshops and peer-learning labs.

The full report can be downloaded from: <https://etc-corporate.org/reports/artificial-intelligence-ai-in-tourism-assessing-and-supporting-ntos-research-marketing-operations/>

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Note to editors

The **European Travel Commission** (ETC) represents the national tourism organisations of Europe. Established in 1948, ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to promote Europe in third markets. Its 36-member tourism boards work together to build the value of tourism for all the diverse European destinations through cooperation in sharing best practices, market intelligence and promotion. For more information, visit etc-corporate.org.

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