

MARKETING GREECE

# DESTINATION INSIGHT

THE OUTLOOK 2026

Turning global trends into local impact



## A new chapter for Destination Insight

Tourism is a field of constant change, where destinations exist within deeply interconnected socio-economic and environmental systems. Infrastructure, nature, culture and services are interdependent, while shared challenges increasingly cut across borders. This makes it more important than ever to shape a future where destinations are managed and marketed sustainably, inclusively and creatively.

Destination Insight was launched by Marketing Greece in December 2024 with the aim of turning global insights into local impact. It began as a bimonthly newsletter sharing innovative perspectives and global trends in tourism. And after seven well-received volumes, which together highlighted 67 destination cases from 23 countries, we are proud to present the next phase of our journey, continuing our commitment to informed decision-making and collaborative solutions for destination challenges.

The *Outlook 2026* offers a deeper analysis of the context and challenges associated with a selection of cases featured in our newsletters.

Within a research-led and values-driven framework, we explore how technology, responsible tourism practices, collaboration and storytelling are reshaping the way destinations position themselves, and how inclusivity, sustainability and innovation can deliver value to both visitors and residents.

In this context, tourism can be seen as contributing to the long-term quality and resilience of a place. Achieving this requires prioritising quality over volume, understanding traveller behaviour and its drivers, and thoughtfully embedding existing and new tools – notably AI – to support better decision-making, all of which you will read about in the pages of this report.

We hope it benefits tourism stakeholders and professionals in co-shaping destinations that thrive, responsibly and collectively.

**Nikos Diamantopoulos**  
**General Manager, Marketing Greece**



## How we turn global insight into local impact

The *Outlook 2026* report is our effort to bring together curated insights and global best practices in tourism, grounded in widely recognised and trusted sources. By combining established frameworks with emerging signals and real-world destination cases, our aim is to capture not only what is changing in tourism, but why it matters and how destinations can respond in practical, meaningful ways.

To set the scene, we open with a 'Traveller Pulse' section, where we take a look at the traveller behind the trend. We frame the motivations, expectations and friction points that shape behaviour and influence how travellers can be meaningfully included in destination-making.

The heart of the report is the 'Destination Cases' section, explored through four interconnected lenses – *identity* (what a destination stands for and how it expresses itself); *rhythm* (pace, seasonality, matching tourism to the natural flow of your destination); *belonging* (who tourism is for, and how residents and visitors are included); and

*responsibility* (what a destination-first mindset actually means). These guide our deeper dive into representative destination cases from around the world.

An 'In Focus' section follows, exploring the growing role of AI in travel. Within it, we look at the realities of AI adoption at both individual and organisational levels, and include interviews that discuss AI strategy and our own experience of launching an AI chatbot.

Reflection points appear throughout to encourage pause, discussion and exchange. And we conclude by describing the methodology followed in compiling the report, along with details of the references and sources, and a feedback space that encourages you to share your perspectives, challenges and cases with us.

We hope you find the report insightful and helpful in your strategy-building and in your day-to-day work.

**Marilena Kalachani, Insights Analyst**  
**Thrasy Petropoulos, Head of Editorial**  
**Marketing Greece**



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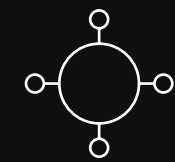
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# TRAVELLER PULSE

## The Traveller Behind The Trend





## The interconnected lenses of travel decision-making

Before we can start looking at destination-level trends, we need to consider the traveller – their intentions, needs and constraints, and how people actually plan and experience travel today. Drawing on insights from multiple sources, we look at what visitors hope to get from a trip, what reassures or inspires them, and where friction quietly creeps in.

Travel decisions are rarely driven by a single factor. Cost, congestion, climate realities and an increasingly complex planning environment shape how choices are made. The same traveller may seek trust and inspiration, value and ease, meaning and restoration – often within the same journey. A single trip becomes a negotiation between these overlapping forces.

To make sense of this, we read traveller behaviour through three interconnected lenses that shape how destinations are chosen and experienced. Each lens captures a different driver, but none exists in isolation.

The question that runs through this section is not simply how destinations should respond to trends, but how design, messaging and optimisation can actively reduce friction and build clarity, confidence and trust for travellers.



# Purpose and identity

## Why travel matters to me

In an industry increasingly shaped more by *why-first* rather than *where-first* travel, people are choosing places that feel aligned with their values, interests and sense of self – and with what they want to take home from a trip.

Personalisation here is less about tailoring itineraries and more about recognising intent. This is the shift witnessed in story-driven travel, from screen-inspired trips to journeys built around cultural festivals, sports fixtures and music events.

At the same time, wellbeing moves from an add-on to a core travel intention: to reconnect, recharge mentally and physically,

pause, celebrate, explore, or pursue a passion. Visitors increasingly aspire to quiet-seeking stays, sensory simplicity, movement-based restoration and connection through time, place and everyday local life – often in rural or nature-led settings. Destinations are chosen not only for what they offer, but for what they allow travellers to be or feel while they are there.

*Sources: Destination Insight synthesis. Based on ALL Accor x Globetrender, Experiential Travel Trends 2026; Booking.com, Travel Predictions 2026; Expedia Group, Unpack '26; Hilton, Hilton's 2026 Trends Report; Skyscanner, Horizons 2025-2026; Trip.com Group x Google (2025), Why Travel?; World Travel Market (WTM), WTM Global Travel Report 2025.*

## Point of friction

### When reset becomes aesthetic

If destinations package restoration as a lifestyle cue but the experience is overstimulating, congested or performative, the promise breaks – especially when the whole trip is meant to restore, not drain.

### REFLECTION POINT

**What are the simplest destination conditions we can design for and protect that genuinely enable restoration and reconnection – such as walkability, access to nature and unhurried time, space, quiet, shade etc.?**



# Trust and validation



## How I decide what to believe and what fits

Travel has always involved uncertainty. You can't fully test the experience before you arrive, and outcomes depend on timing, weather, conditions on the ground and personal expectations. What's changing is how much of the travel journey now revolves around building trust. As planning environments fragment across platforms and formats, and as new tools scale both guidance and noise, travellers increasingly take validation into their own hands.

Decisions are shaped less by a single authoritative source and more by a triangulation mindset – cross-checking social content, reviews, word of mouth, peer communities and digital tools to assess what feels real, current and right for them.

Travellers look for consistency across sources rather than perfection in one. Anything that feels over-curated, excessively hyped or exaggerated can quickly undermine confidence and push them away.

*Sources: Destination Insight synthesis. Based on ALL Accor × Globetrender, Experiential Travel Trends 2026; Amadeus × Globetrender, Travel Trends 2026; World Travel Market (WTM), WTM Global Travel Report 2025.*

## Point of friction

### When verification becomes a burden

If travellers have to work too hard to confirm basics or decode what's genuine, the destination story loses authority. Trust gives way either to scepticism or to defaulting to the safest, most familiar choice.

### REFLECTION POINT

**Where do travellers still need to “do the work” of verifying our promise – and what would make the experience feel reliably true without becoming overly managed?**



# Pragmatism and constraints

How cost, capacity, climate, and disruptions shape a trip

Pragmatism and constraints reflect a traveller who still wants the trip, but is navigating trade-offs. Economic considerations are reshaping what feels possible, increasing sensitivity not only to overall cost, but to the perceived value of both money and time.

As a result, decision logic often shifts. Visitors become more selective, more timing-aware and less tolerant of friction – from surprise costs and potential delays and safety risks to the sense that a place (or landmarks within it)

may be too congested to enjoy. Many adjust by shifting travel months, seeking milder temperatures, checking possible disruptions more closely, or choosing destinations associated with greater predictability and comfort.

*Sources: Destination Insight synthesis. Based on ALL Accor x Globetrender, Experiential Travel Trends 2026; Amadeus (2025), Connected Journeys: How Technology Will Transform Travel in the Next Decade; European Travel Commission (ETC), Monitoring Sentiment for Intra-European Travel - Wave 21 (Spring & Summer 2025) and Wave 23 (Autumn 2025 & Winter 2026); Expedia Group, Unpack '26; World Travel Market (WTM), WTM Global Travel Report 2025.*

## Point of friction

### When the trip becomes a stress test

If value is promised but the experience is defined by hidden costs, queues, excessive heat or disruption, travellers feel they have paid more to get less. This erodes satisfaction and weakens the likelihood of repeat visits.

### REFLECTION POINT

**Where do travellers face the sharpest trade-offs in our experience today – cost, climate, capacity pressure, access or disruption – and what would genuinely reduce friction without diluting what makes the place worth choosing?**

# DESTINATION CASES

## Building A Case For The Future Of Your Destination



## Tourism as an act of delicate and deliberate alignment

What visitors increasingly seek from travel is closely aligned with what destinations themselves need in order to thrive. Wellbeing, meaning, belonging, care and authenticity are no longer peripheral, but have become central drivers of visitor choice. At the same time, with visitor numbers rising, destinations are grappling with growing pressures around balance, liveability, legitimacy, environmental limits and long-term resilience. This convergence marks a critical turning point: tourism is no longer only about attracting demand, but about actively shaping quality and long-term health of a place.

This section examines how destinations are responding to this shift through four interconnected lenses:

**Identity** > pinning down what a place stands for beyond its landmarks;

**Rhythm** > syncing the visitor experience with the natural flow of the destination;

**Belonging** > achieving meaningful inclusivity by determining who shapes and benefits from tourism, and

**Responsibility** > translating sustainability needs into everyday practice.

Highlighting featured cases from the 2025 *Destination Insight* newsletters, we explore how destinations are addressing challenges related to tourism, from identity-building and seasonality to visitor behaviour and long-term place management.

We focus on the *how* and *why* of each case: the challenge being addressed, the shift in thinking it signifies, and what this might mean for your own destination. Throughout, we invite reflection and dialogue – internally, and with the stakeholders and communities that shape place.



# Identity beyond icons

How to build your destination identity in ways that are both modern and true to your roots

Destination identity is not shaped by campaigns or “must-see highlights” alone. It is increasingly defined by what a place chooses to stand for and by the everyday decisions that shape local life, culture and the visitor experience on the ground.

When identity building is treated as a continuous design process — grounded in lived local realities and the voices that shape them — it influences not only who a destination attracts, but how visitors relate to and move through the place.

In this context, storytelling becomes a tool for listening and adaptation rather than just promotion. It allows destinations to intentionally (re)frame perceptions – turning constraints into character, overturning preconceptions, and amplifying overlooked strengths.

When done well, this translates lived identity into meaningful reasons to visit, while helping protect places from landmark and stereotype overexposure that can gradually turn culture into a commodity.





## A Bubble Full of Life By Luxemburg City Tourist Office

### What it is

A video campaign that reframes Luxembourg through a human-scale narrative, using humour and everyday encounters to show how the city feels rather than listing its landmarks.

### The challenge

Overcoming a narrow, externally imposed stereotype of the city as purely institutional and transactional, which limits its emotional appeal and relevance for international audiences.

### How it works

By overturning a fixed perception and focusing on lived experience through a witty dialogue between two “unintentional” visitors, the campaign establishes a clear, contemporary identity that residents recognise and visitors can connect with, strengthening the city’s positioning without relying on iconic imagery.

[Watch the video](#) →



DESTINATION INSIGHT

## Copenhagen is Warmest When it’s Coldest By Visit Copenhagen

### What it is

A destination identity campaign that reframes Copenhagen’s winter season by focusing on social warmth, everyday rituals, and shared experiences with locals despite the weather or seasonal limitations.

### The challenge

Turning a perceived weakness – cold, dark winter conditions – into a compelling reason to visit, while supporting year-round demand and reducing seasonal concentration.

### How it works

By flipping a negative into a defining identity trait, the campaign anchors Copenhagen’s positioning in lived culture and human connection, creating an emotionally resonant narrative that residents recognise and visitors actively seek out.

[More here](#) →

## Waltz into Space By Vienna Tourist Board

### What it is

A high-concept cultural storytelling initiative that reinterprets Vienna’s musical heritage by broadcasting Johann Strauss’s *Blue Danube* into space, turning a historic anniversary into a modern global narrative.

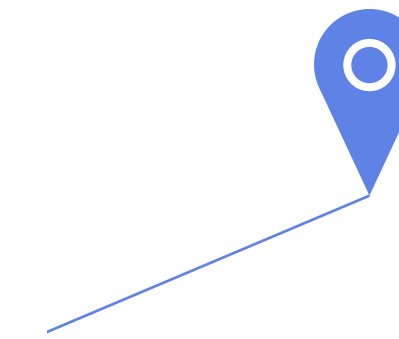
### The challenge

Keeping world-famous cultural heritage relevant in a media-saturated landscape, without reducing it to nostalgia or static iconography.

### How it works

By anchoring the initiative in a historical moment – the 200th anniversary of Johann Strauss and the absence of *Blue Danube* from NASA’s Voyager Golden Record in 1977 – the project creates a purposeful narrative. The collaboration with the European Space Agency elevates local heritage into a globally resonant story, reframing culture as something living and shareable. In doing so, Vienna extends its identity beyond physical landmarks, while reinforcing its position as a contemporary cultural capital.

[More here](#) →



## Philly Love Stories (and more) By Visit Philadelphia

### What it is

An always-on, resident-led destination storytelling strategy made up of multiple initiatives – from neighbourhood stories and social content to public billboards and local media – that positions everyday Philadelphians as the city’s primary ambassadors.

### The challenge

Generating demand in a city where travel decisions are shaped less by landmark-based messaging and more by visits to friends and relatives and social recommendation.

### How it works

By focusing on residents as the primary audience, the strategy strengthens local pride by turning everyday life into the destination’s story, positioning locals as ambassadors and activating trust-based, informal narratives that drive word-of-mouth at scale.

[More here](#) →





## REFLECTION POINT

**If visitors arrived with only your destination's story in mind, would what they encounter on the ground feel consistent with how the place is actually lived today?** Consider different seasons, neighbourhoods and everyday realities.



# Matching flow to rhythm



How to achieve tourism that aligns with the natural pace and balance of your destination

Places under constant pressure – whether from seasonality, crowding or intensity of use – gradually lose their capacity to recover, host visitors and sustain everyday life.

It is vital to match the flow of tourism – not only in terms of numbers, but also direction, timing and style – to the rhythm of a place. This allows destinations to protect their environment and cultural heritage, support local communities, and create space for restoration and renewal. In doing so, destinations are then able to prioritise balance over volume and pace over acceleration, allowing more meaningful experiences to follow naturally.

In practice, this means designing tourism in ways that sync the visitor experience with the natural flow and long-term wellbeing of the destination, without exhausting the places that make this possible.



## Ireland Unrushed By Tourism Ireland

### What it is

A destination campaign that encourages travellers to slow down and stay longer, using curated slow-travel itineraries to explore Ireland’s lakes, rivers, coastlines and cultural sites by train and bicycle.

### The challenge

Managing visitor flows and seasonality in a way that protects quality of life while shifting demand away from fast, checklist-driven travel.

### How it works

By reframing time as a core part of the experience and promoting low-impact ways of moving through the destination, the initiative aligns visitor behaviour with Ireland’s famous laid-back way of life, supporting deeper engagement and more balanced tourism across regions and seasons.

[More here](#) —>



## The Cultigen Project By City of Copenhagen

### What it is

An urban visitor-management initiative developed in collaboration with Aalborg University, the National Museum of Denmark, StoryHunt, We Do Democracy and Wonderful Copenhagen, which explores how tourism can be redistributed toward lesser-known neighbourhoods while remaining in balance with residents’ quality of life.

### The challenge

Managing visitor concentration in a way that protects liveability and social acceptance, while avoiding top-down dispersal strategies that overlook local capacity, identity and community readiness.

### How it works

Combines community participation through citizen assemblies and open dialogue and utilises digital and AI tools, collecting and analysing data including photos, impressions and sentiment. Visitor flow is, therefore, treated as a shared urban issue.

[More here](#) —>

## The Swedish Prescription By Visit Sweden

### What it is

A national destination concept that positions Sweden as a place that can be “prescribed” for everyday stress, linking its renowned nature and lifestyle habits to physical and mental wellbeing through a playful yet evidence-led medical framing.

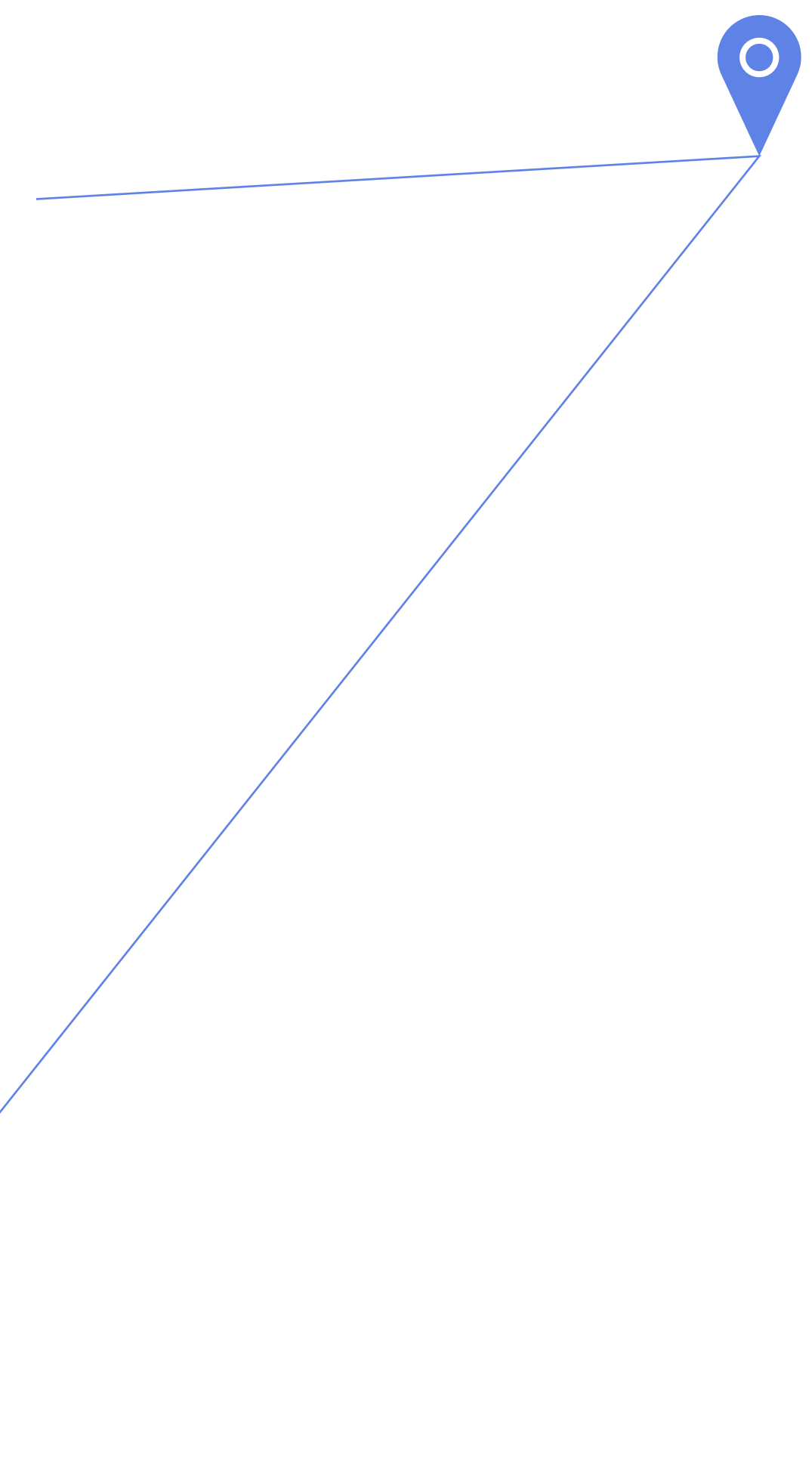
### The challenge

Responding to rising demand for restorative travel without reducing wellbeing to vague wellness claims, while also encouraging slower, more meaningful engagement with place across seasons.

### How it works

By grounding wellbeing research and everyday Swedish practices (such as saunas, cold dips and fika), the initiative turns pace, routine and cultural habits into defined destination assets, shaping visitor expectations toward longer stays, deeper connection, and lower-intensity experiences.

[More here](#) —>





## REFLECTION POINT

**Where is tourism moving faster than the everyday rhythm of your destination – and where could a change of pace improve both visitor experience and quality of life?**

Look at timing, routes and travel styles: When people arrive, how long they stay, how they move through places, and which experiences encourage slowing down rather than speeding up.



# Belonging by design



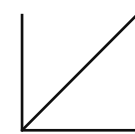
DESTINATION INSIGHT

How tourism can benefit from inclusion, trust and a shared sense of legitimacy

As destinations face growing pressures around liveability and social acceptance, inclusivity increasingly determines whether tourism is welcomed or resisted.

At its core, inclusivity is about who tourism is for, who gets to shape it, and who benefits from it – and therefore whether tourism earns the legitimacy needed to continue.

Therefore, by engaging meaningfully with diverse local communities, stakeholders and visitors, destinations can move beyond simplified assumptions and gain a more nuanced insight into lived realities and emerging tensions. Put another way, when people can see themselves reflected in how tourism is designed and governed, a sense of belonging is created – and belonging becomes the condition that allows destinations (and all aspects of tourism within them) to adapt and remain prosper over time.





## Accessible Tourism By Destination British Columbia

### What it is

A region-wide accessibility initiative that integrates barrier-free travel into destination infrastructure, information, and business support. It provides detailed guidance on accessible accommodation, transport and adapted experiences – particularly outdoor activities – alongside suggested itineraries and first-hand stories, while offering tourism businesses practical resources to develop and promote accessible offers.

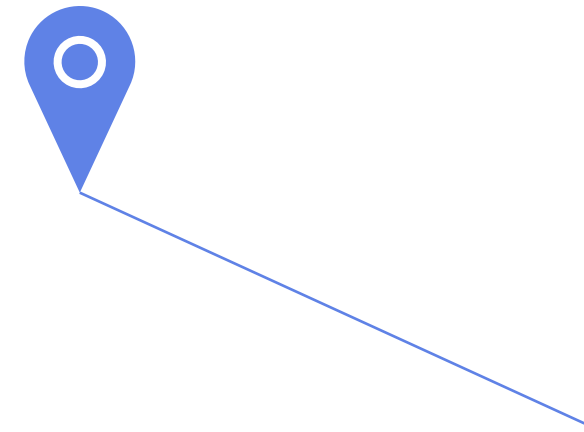
### The challenge

Ensuring that tourism is genuinely accessible to people with different abilities, ages and needs, while moving beyond fragmented or symbolic accessibility measures.

### How it works

By embedding accessibility into destination design and supporting both visitors and tourism businesses, the initiative builds inclusion at scale and with consistency, strengthening trust and participation, and the sense that the destination is designed for everyone – not just a few.

[More here](#) —>



## STEP UP Walkability for Women By Transform Transport

### What it is

A participatory urban research project that maps how women experience walking in Milan at night, combining lived experience with spatial and technical data to understand safety as part of everyday mobility.

### The challenge

Addressing safety as a prerequisite for inclusion and liveability, recognising that perceptions of risk vary by gender, age, mobility and context, and directly shape how both residents and visitors move through a city.

### How it works

By combining participatory insights from local women with spatial and technical data – such as visibility, ease of movement, sidewalk width, lighting, and mobility patterns – the project translates complex perceptions of safety into actionable planning intelligence. This evidence-led approach shows how resident-focused safety improvements can become a destination asset.

[More here](#) —>

## Because of us, Ljubljana is... By Ljubljana Tourism

### What it is

A storytelling campaign that highlights everyday actions by residents – shopkeepers, creatives, gardeners, guides, volunteers – showing how their care, creativity and behaviour shape what visitors experience. It invites them to complete the open-ended phrase “Because of us, Ljubljana is...”, reinforcing shared ownership of the city’s identity. It coincided with Ljubljana Tourism Week, an annual programme that invites locals to rediscover the city as visitors through guided tours, tasting experiences, and hands-on workshops.

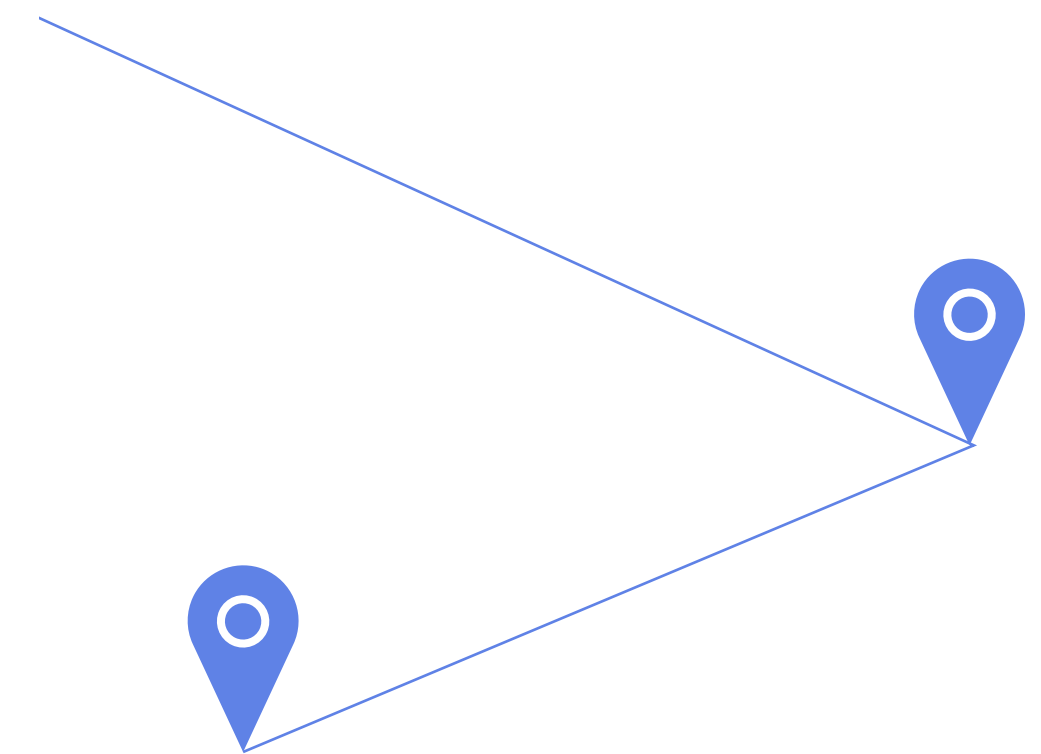
### The challenge

Ensuring tourism is understood not as something created for visitors alone, but as a shared asset that tangibly supports everyday life in the city – from jobs and local creators to infrastructure, green spaces, and cultural vitality – and therefore earns broad social acceptance.

### How it works

By clearly linking tourism to visible benefits funded and sustained through visitor activity, the initiative makes residents visible co-creators of the destination and active participants in how the city is experienced and valued. In doing so, it strengthens belonging, pride and trust and reinforces tourism’s long-term legitimacy as something created because of the people who live there.

[More here](#) —>





## Helsinki Participatory Budgeting Programme

### By the City of Helsinki

#### What it is

A city-wide participatory budgeting programme that enables residents to propose, vote on, and co-develop projects shaping public spaces, services, and everyday experiences. Collaboration and inclusive participation are supported through an online platform where residents submit ideas and vote on proposals, alongside a card game – with accompanying digital resources – that brings residents and experts together to develop ideas into viable projects.

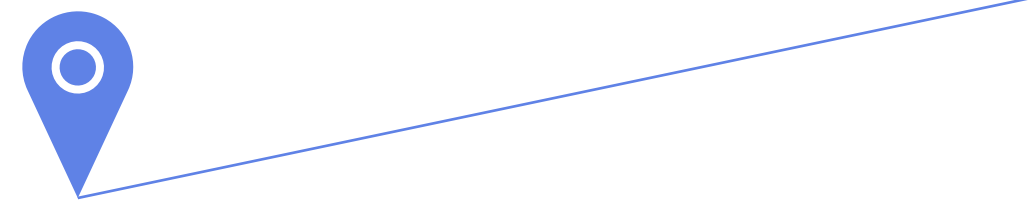
#### The challenge

Moving beyond consultation to meaningful participation, ensuring residents have real influence over decisions that affect liveability and how tourism intersects with daily urban life.

#### How it works

By allocating decision-making power and resources directly to communities, the programme embeds co-creation into everyday governance. With more than €22 million invested in 164 resident-led projects – including upgraded parks, year-round accessible swimming areas, and additional public toilets – the outcomes are tangible and visible. This makes shared benefits clear, strengthens trust in public institutions, and builds long-term support for how the city evolves for both residents and visitors.

[More here](#) →  
[See the projects](#) →



## Nordic Guidebook for Tourism Innovation

### By Nordic Innovation

#### What it is

A shared methodological guide published as part of XNTC, a cross-Nordic collaboration project bringing together tourism organisations, businesses, researchers and local authorities. The guide compiles case studies, tools and insights from across the region, showing how destinations are experimenting with more sustainable tourism models. It provides a systemic framework showing how innovation in tourism extends beyond business to include local authorities, research organisations and cultural institutions.

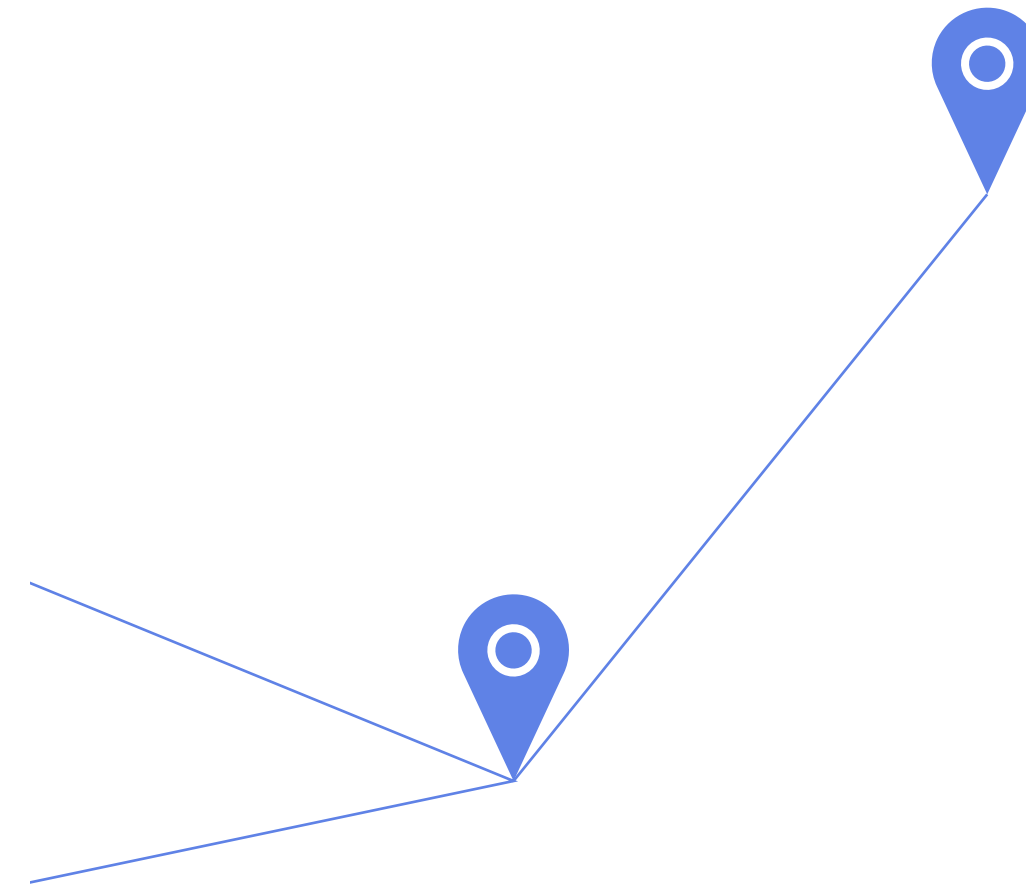
#### The challenge

Addressing complex, long-term destination issues – such as climate transition and digital change – that no single organisation or sector can tackle alone.

#### How it works

By encouraging shared recognition of challenges and providing a common framework for critical thinking and collaboration, the guide supports a more inclusive approach to innovation. It broadens tourism transformation beyond business-led solutions, enabling destinations to build shared understanding, ownership and capacity for practical, long-term change. Rather than prescribing solutions, it offers a structured way for destinations and stakeholders to collectively map challenges, test approaches, and co-design responses grounded in real-world practice.

[More here](#) →





## REFLECTION POINT

**Whose perspectives are absent or underrepresented when priorities, experiences and shared benefits are being defined – and what is this costing your destination?**

Consider different voices: Not just residents, local authorities and businesses, but also groups whose everyday life intersects with tourism yet are often overlooked or marginalised, such as women, younger and older voices, the LGBTQ+ community, people with disabilities, farmers etc.



# Everyday shared responsibility



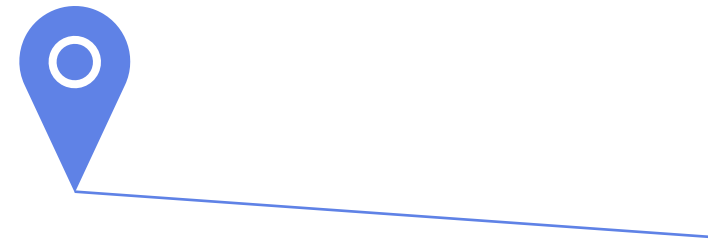
How sustainability works when it is measured and embedded in daily practice

Sustainability in tourism increasingly fails not for lack of intent, but because it remains abstract and detached from the lived reality of places.

As pressure on ecosystems, communities and cultural heritage grows, destinations can no longer rely on universal frameworks alone. This increases the need to define and measure what truly sustains the life of a place, human and more-than-human.

In this way, sustainability is translated into everyday choices, social norms and locally meaningful indicators, becoming a shared

practice rather than a stated value. This shift reflects a deeper convergence: what travellers increasingly value – care, meaning and responsibility – is exactly what destinations must protect to remain healthy and alive.



## CopenPay By Wonderful Copenhagen

### What it is

A gamified, app-based incentive system that rewards visitors for making responsible choices by linking sustainable actions to cultural experiences. Initiatives have included offering free kayaking tours to participants in canal clean-ups and inviting people who bring plastic items for recycling to the National Gallery to work with artists to transform waste into works of art.

### The challenge

Moving sustainability from stated intent to everyday behaviour, by making responsible choices easy, attractive and rewarding for visitors.

### How it works

By aligning incentives with desired behaviours and capturing data on participation, CopenPay turns sustainability into a lived practice while generating insights that help the destination refine and scale its approach.

[More here](#) →

## First Mile By the EU Single Market Programme

### What it is

A European project that supports 80 tourism SMEs across four countries (France, Italy, Norway and Slovenia) in applying behavioural science to test low-cost interventions that make sustainable choices easier, more attractive, and often the default option for travellers. It examines 29 behavioural tactics related to energy, water, waste, mobility, and the promotion of local gastronomy. Indicative results include a 24% reduction in energy consumption per guest through lower default room temperatures, and a 46% reduction in waste on marine excursions through “smart” pre-trip shopping prompts.

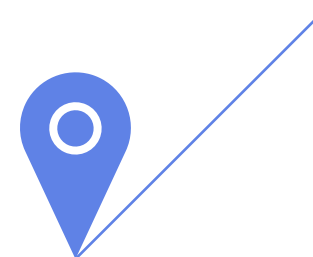
### The challenge

Translating sustainability goals into measurable, everyday operational change for small tourism businesses with limited resources.

### How it works

First Mile delivers immediate, measurable impact, helping businesses design and implement low-cost interventions that make sustainable choices easier, more attractive and often the default option for travellers.

[More here](#) →



## Loloma Hour By Tourism Fiji

### What it is

An initiative that coordinates the national commitment of local tourism bodies to safeguard the sustainability of the destination by inviting visitors to devote one hour of their stay to activities that support local communities and ecosystems. In the local language, *loloma* expresses the islanders’ bond with their surroundings – encompassing gratitude, love, care and responsibility towards place.

### The challenge

Ensuring sustainability is experienced as meaningful, shared responsibility – rather than an abstract principle or optional add-on – between both stakeholders and visitors.

### How it works

By translating local values into simple, participatory actions, Loloma Hour turns responsibility into a lived practice, strengthening visitors’ connection to place while delivering tangible benefits for communities and nature.

[More here](#) →

# DESTINATION CASES

## Don’t Love it to Death By the Sea-to-Sky Corridor Destination Management Council, British Columbia, Canada

### What it is

A behaviour-change initiative that uses clear messaging and humour (including the Good House Guest short video series) to encourage residents and visitors to care for the region’s natural and cultural heritage, reframing responsible actions as a shared social norm. The DMO surveyed 600 people – including tourism bodies, local communities and residents – identifying respect for nature and people’s behaviour towards it as top priorities.

### The challenge

Addressing the cumulative impact of everyday visitor behaviour on fragile places, where formal rules alone are insufficient to protect quality of life and ecosystems.

### How it works

By treating the destination as a shared home and appealing to social norms rather than enforcement, the initiative makes responsibility relatable and actionable, helping translate sustainability values into everyday conduct for both locals and visitors.

[More here](#) →  
[Watch the video series](#) →



## REFLECTION POINT

**If you were to define sustainability KPIs that are aligned with the health of your place, which indicators would genuinely reflect its environmental, cultural and social wellbeing — and which ones are you currently not measuring?** Look beyond standard performance metrics. Consider everyday behaviours, social norms, and local signals of care – from how people move through spaces and interact with nature to how cultural practices are supported and shared, or quietly eroded over time.

**IN FOCUS**

# Travel In The Age Of AI



## The times they are AI-changin'

The potential of AI in tourism is unmistakable. For visitors, it is already embedded across the travel experience, shaping how trips are discovered, compared, planned and experienced. For tourism professionals - at both individual and organisational levels - AI has the capacity to improve productivity and scale, save time and resources across workflows, and support insight generation and decision-making.

But beyond the hype, where are we really in terms of AI adoption? To what extent has the rapid evolution of LLMs translated into everyday, meaningful use? And how far has experimentation with generative AI moved into consistent practice?

This section explores these and related questions through insights from key market reports. We consider whether personalisation around choice, price, timing and relevance is already changing visitor behaviour - and what this means for how destinations are discovered, chosen and remembered across the booking funnel.

At the same time, questions of trust remain unresolved. Where do organisations and travellers stand on issues of accuracy, bias, legitimacy and loss of control - particularly as AI moves from supporting decisions to actively shaping them?

For destinations and tourism organisations, these questions are strategic, not technical. How much value is being created - and for whom? Where is AI used internally, and where is it genuinely visible to visitors? How do we develop AI strategies or launch tools such as chatbots responsibly and effectively?

While it is too early to be conclusive on these questions, they are among those we should all be considering now to stay on the right side of the AI adoption curve.





# Personal choice is the key to traveller AI adoption

At the heart of AI adoption is the ability for consumers to personalise their travel experience through seeking inspiration, choosing tailored experiences, price comparisons, and saving time by automating parts of their journey.

## A traveller-first approach to AI

“The traveller must be at the center of everything we do and particularly so when designing Generative AI applications, many of which will define the traveller’s interaction with a travel company.”

**Rodrigo Acuna Agost**  
Head of Research & Generative AI Center of Excellence, Amadeus

DESTINATION INSIGHT

How helpful do you find AI tools for each of the following travel planning components?	Very helpful
Finding inspiration or destination ideas	72%
Comparing and booking flights	57%
Finding and booking accommodation	60%
Itinerary planning	54%
Understanding visa or local entry requirements	58%
Budgeting and cost estimation	58%
Discovering and booking activities and tours during their trip	59%
Customer service or trip issue resolution	53%

McKinsey & Company x Skift Research (2025), Remapping Travel with Agentic AI (U.S. Travel Tracker Survey, Jun–Jul 2025, sample=1002 U.S. travellers)

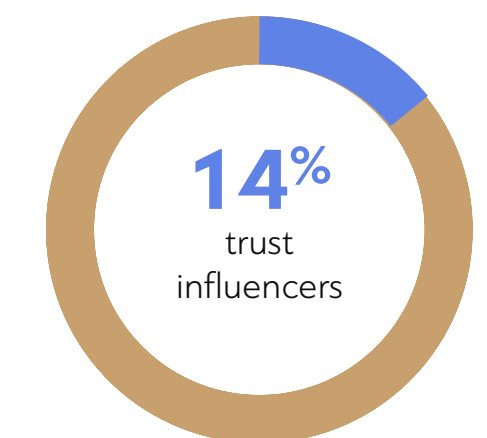
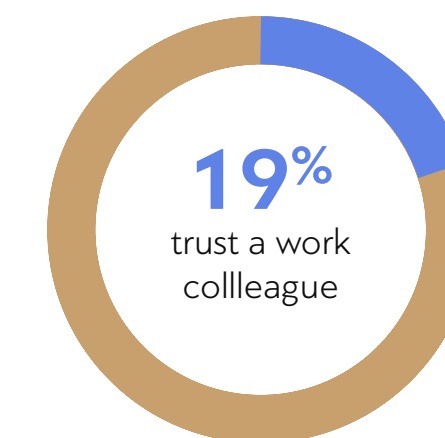
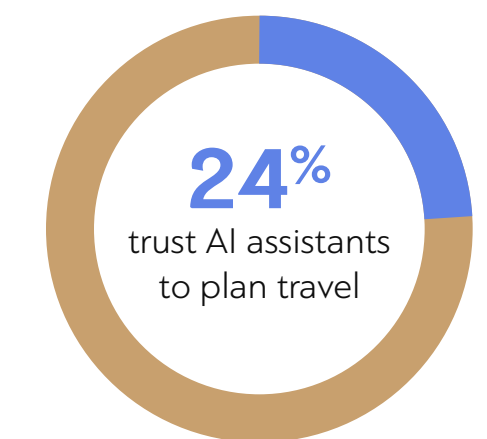
## Chatbots are on the rise

Used by 18% of travellers planning or booking international trips.

World Travel Market (2025), WTM Global Travel Report 2025

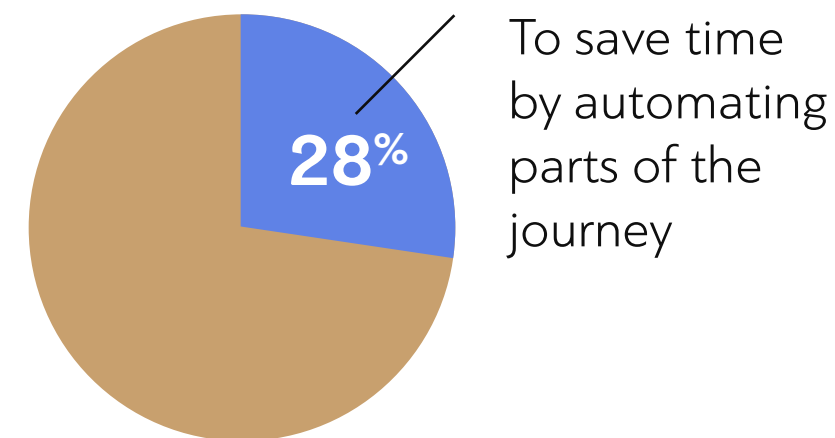
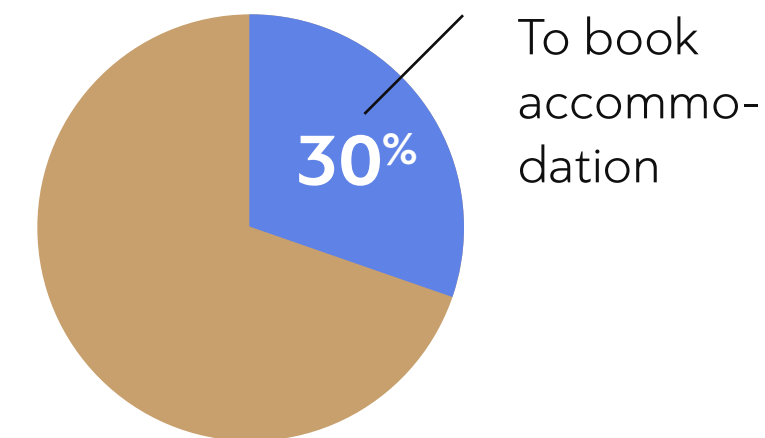
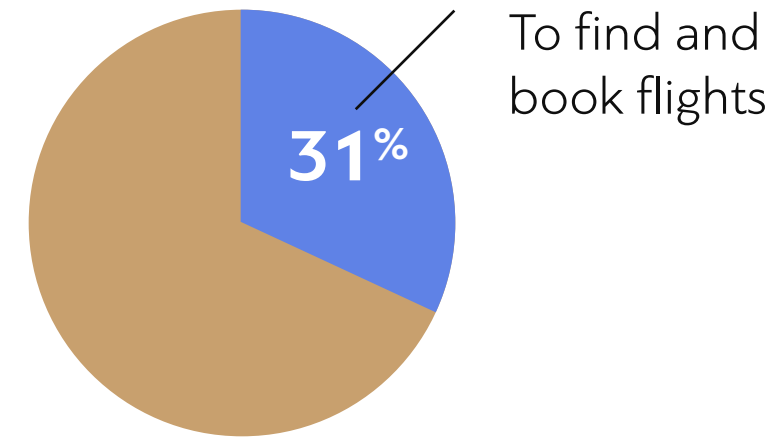
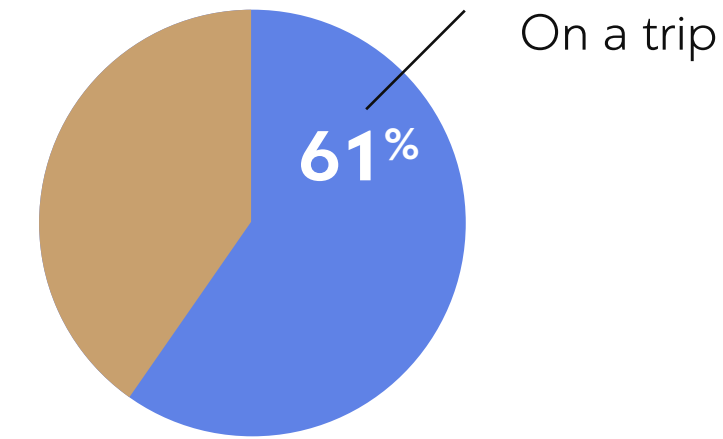
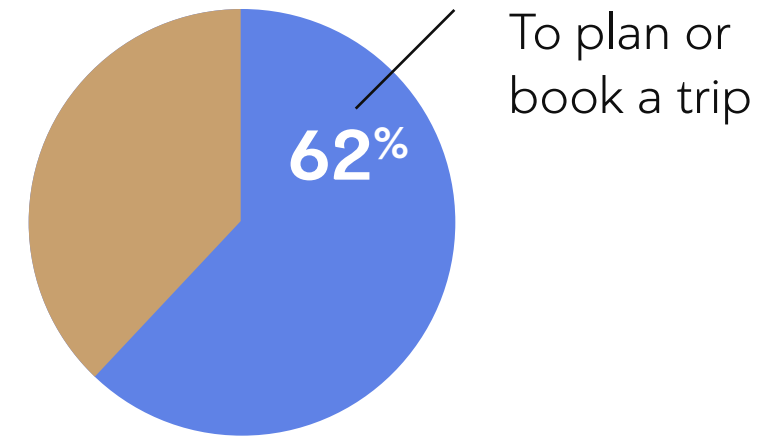
## Who do we trust when travel planning?

Booking.com (2025), The Global AI Sentiment Report

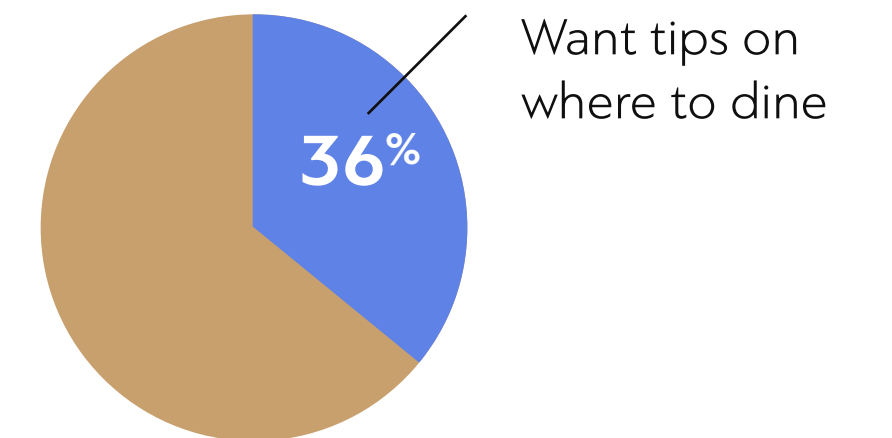
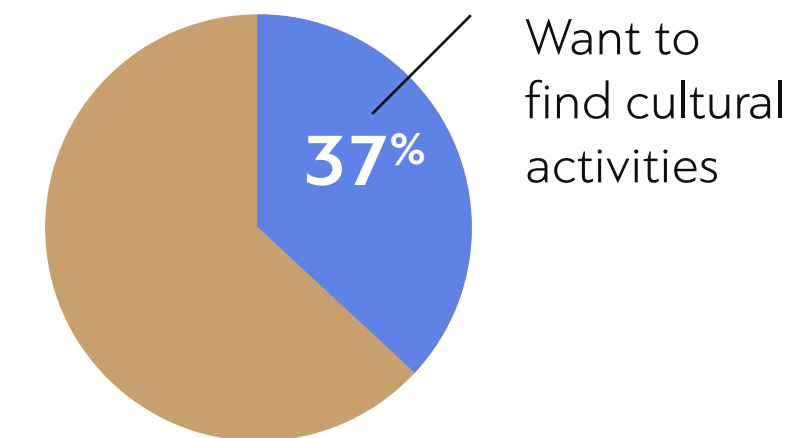
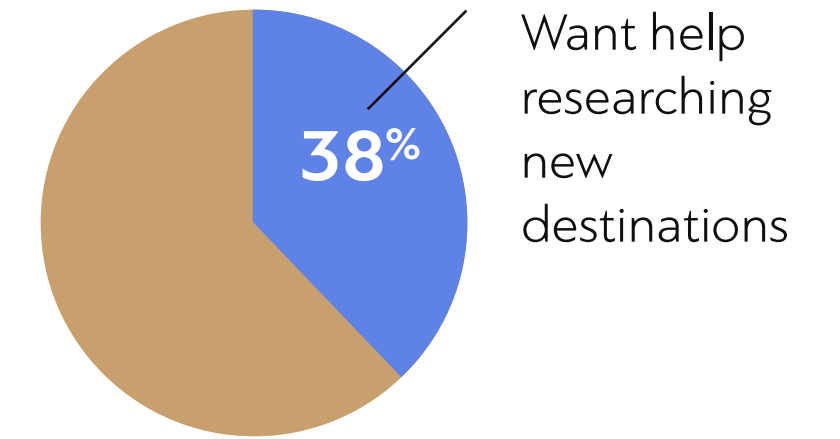
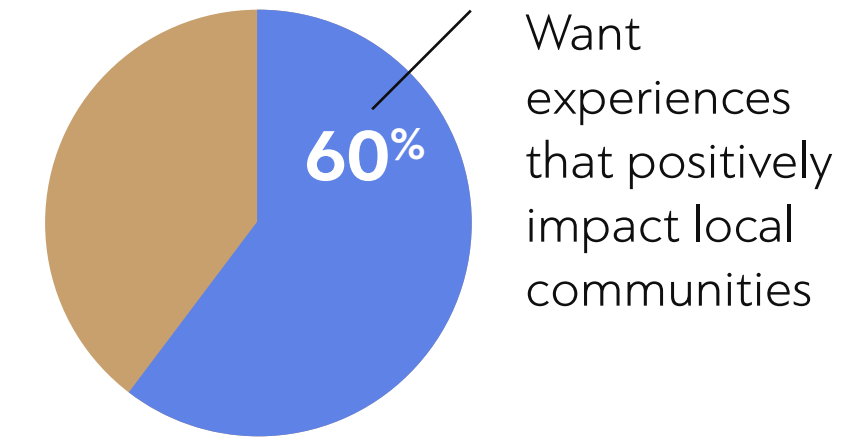
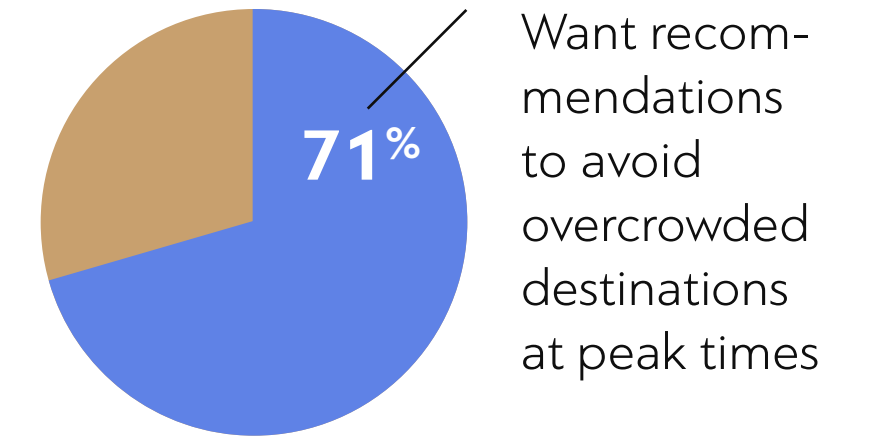




## Majority of travellers have used AI



## How travellers want AI to improve their experiences



Source: Booking.com (2025), The Global AI Sentiment Report



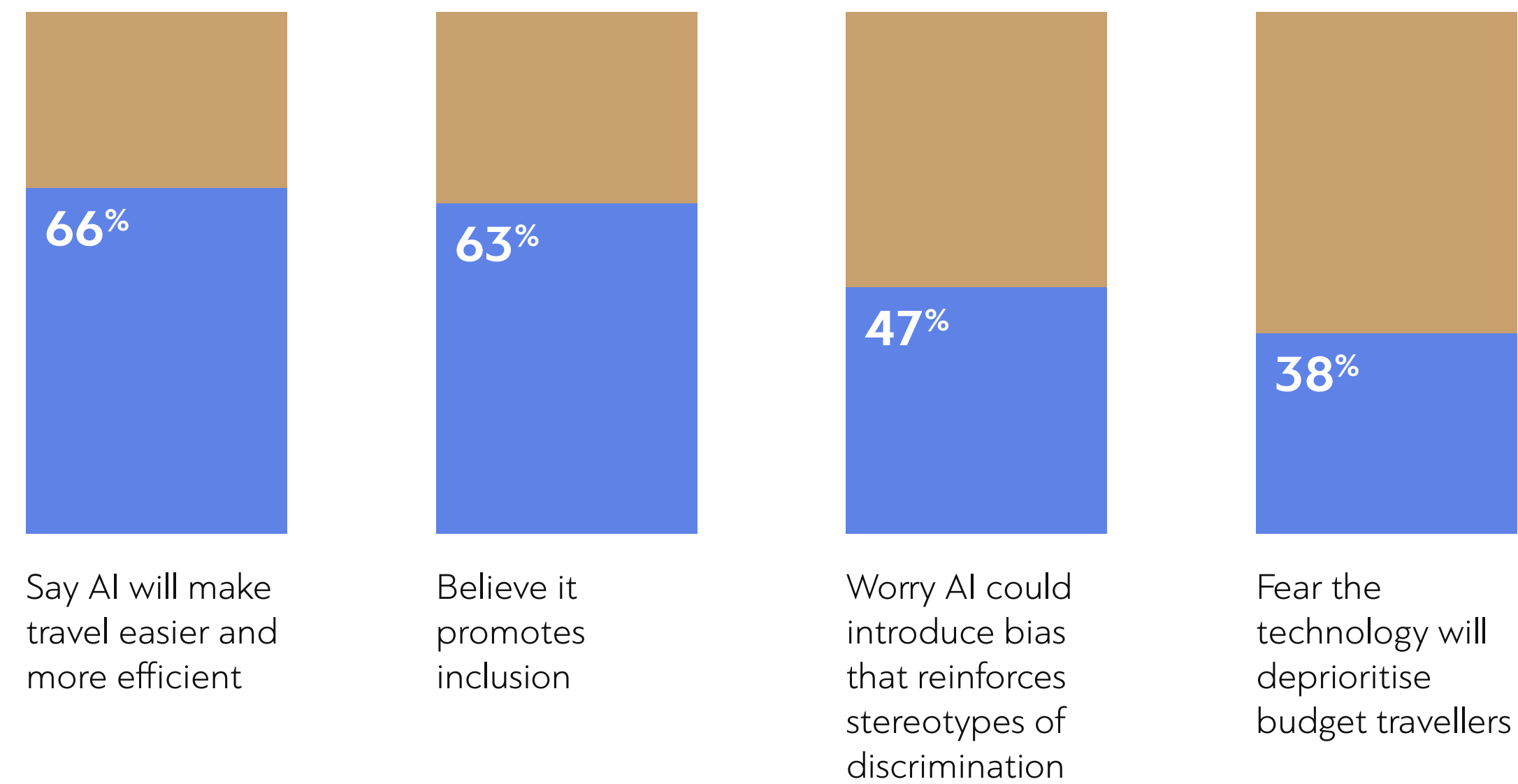


## On the other hand

Travellers remain sceptical about some of the information provided by AI tools, with concerns about bias, stereotyping and accuracy.

### Weighing up the benefits of AI decision-making

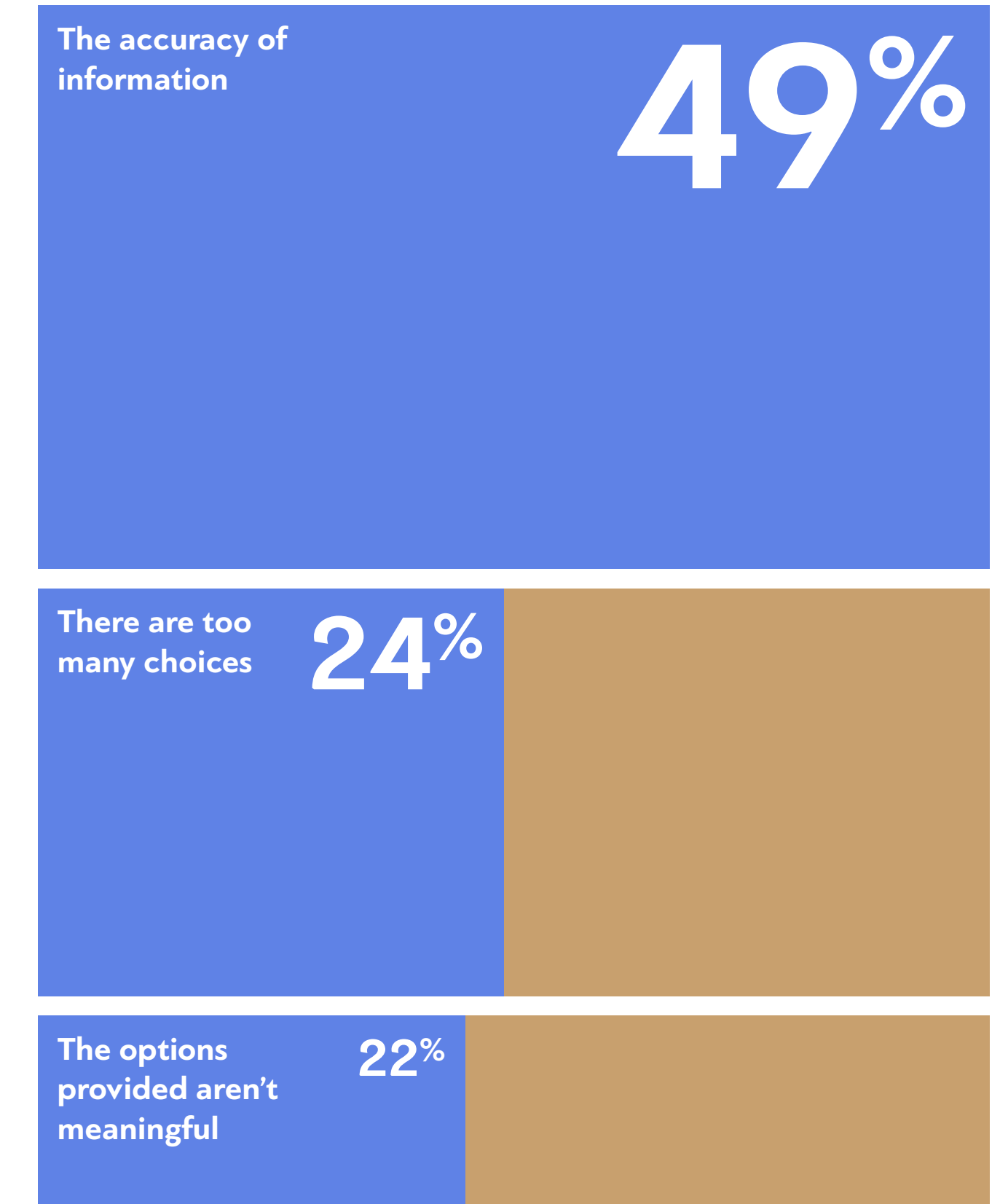
*Booking.com (2025), The Global AI Sentiment Report*



DESTINATION INSIGHT

### The top worries travellers have when using AI to book travel are:

*Skyscanner (2025), Horizons 2025-2026*





# GenAI steals the show in internal office use

As Amadeus puts it in its 2025 *Navigating the Future* report, “Generative AI is no longer a ‘coming technology,’ it has arrived.” From widely used platforms like ChatGPT, Claude, Gemini, Copilot, Notebook and Perplexity to travel-specific tools such as Layla, Kayak.ai and Mindtrip, GenAI is changing the way we compose, compile and analyse every day of our working lives.

## But are destinations being left behind?

“39% of destination organisations haven’t launched any AI services, neither internally nor externally... 24% have developed custom GPTs or AI agents for internal use, while only 4% have done so for external audiences.”

**Group NAO (2025), AI Opener for Destinations: AI Adoption Survey (sample: 311 respondents across 157 destination organisations, Europe & North America)**

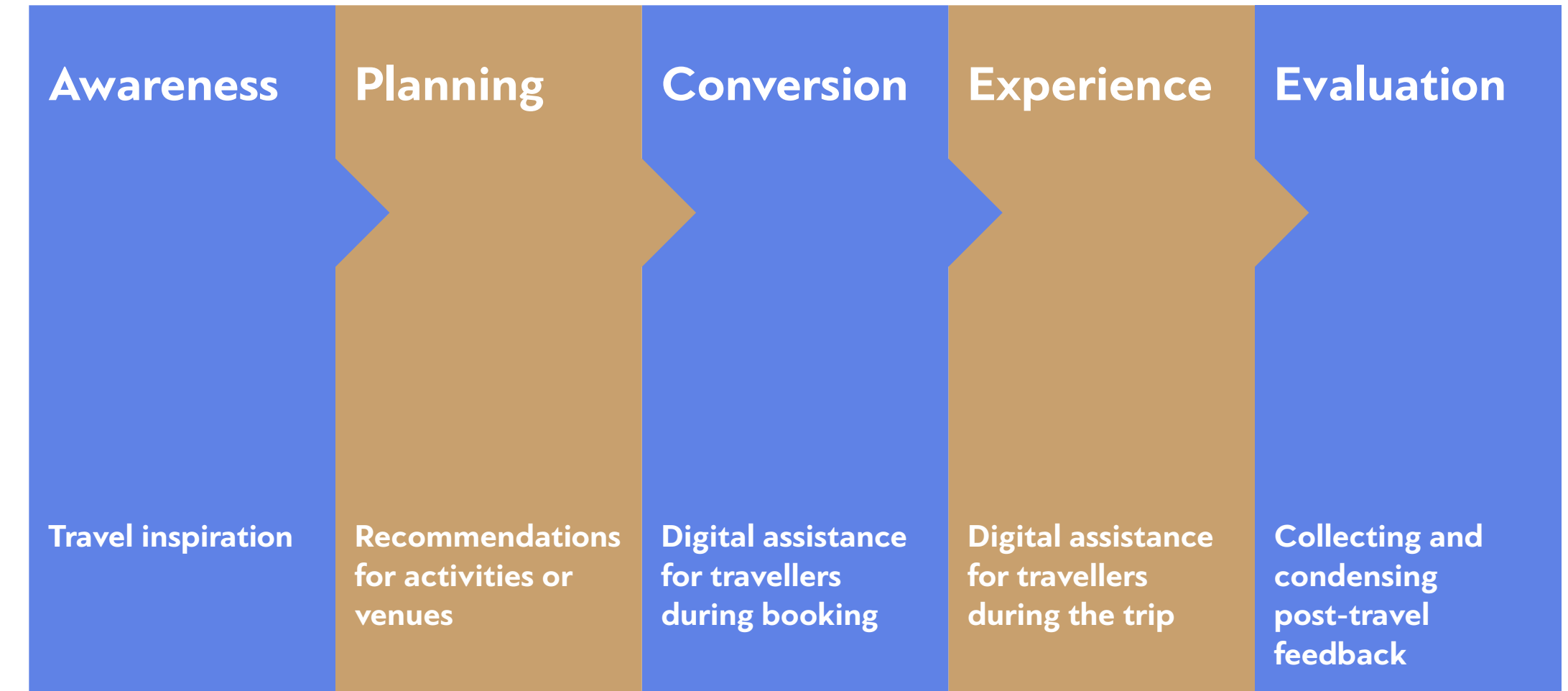
“While AI is commonly used for content creation, only 28% of DMOs in our study reported using AI for data analysis. Expanding AI use for this purpose represents a powerful opportunity to uncover trends and elevate campaign performance.”

**European Travel Commission (ETC) (2025), Artificial Intelligence (AI) in Tourism (sample: European National Tourism Organisations, NTOs)**

## Use of AI across the travel journey

All stages of the funnel show 44–53% use of GenAI among travel-sector companies.

**Amadeus (2025), Navigating the Future (sample: 306 senior technology decision-makers within the travel industry)**



### REFLECTION POINT

With AI now influencing every aspect of the traveller experience, and agentic AI around the corner, are we seeing the start of the breakdown of the classic travel conversion funnel?





### Does your company use GenAI for any of the following internal processes?

Amadeus (2025), Navigating the Future (sample: 306 senior technology decision-makers within the travel industry)

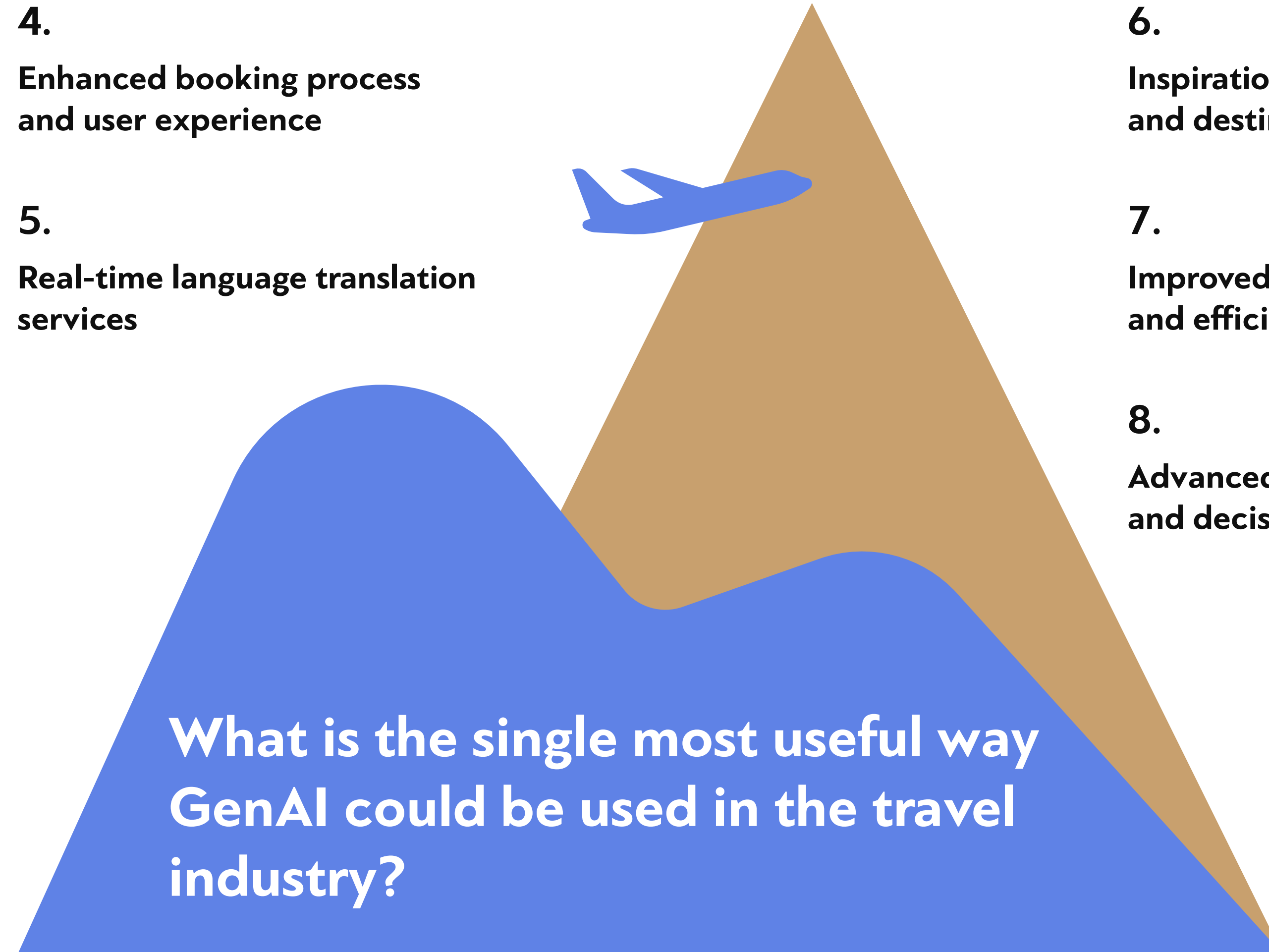




- 1.**  
**Personalised travel recommendations and itineraries**
- 2.**  
**Improved customer service through advanced chatbots and virtual assistants**
- 3.**  
**Dynamic pricing and targeted advertisements**

- 4.**  
**Enhanced booking process and user experience**
- 5.**  
**Real-time language translation services**

- 6.**  
**Inspiration for new travel ideas and destinations**
- 7.**  
**Improved safety and efficiency in travel**
- 8.**  
**Advanced data analysis and decision-making capabilities**



*Amadeus (2025), Navigating the Future (sample: 306 senior technology decision-makers within the travel industry). Ranking order: 1 = most useful.*

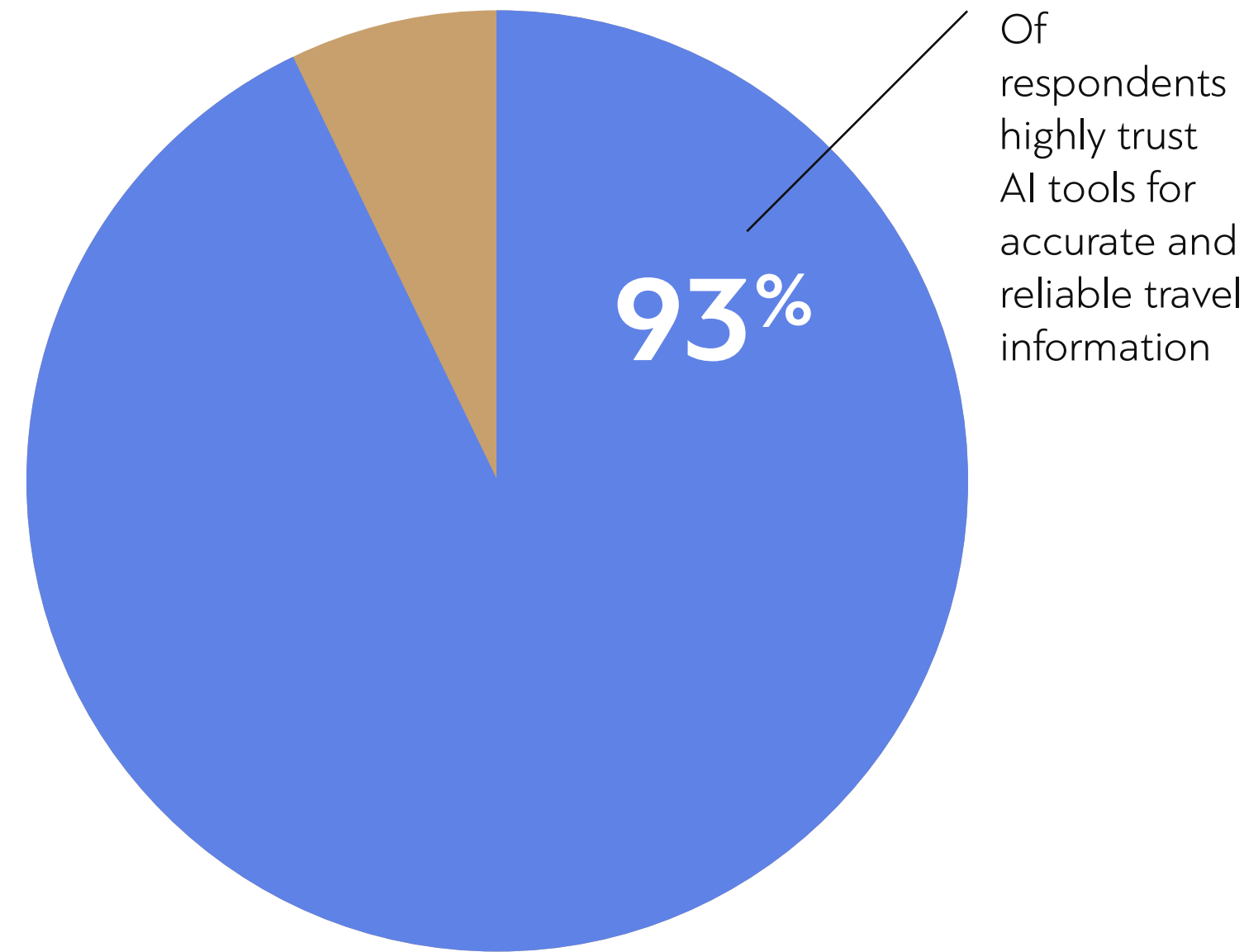




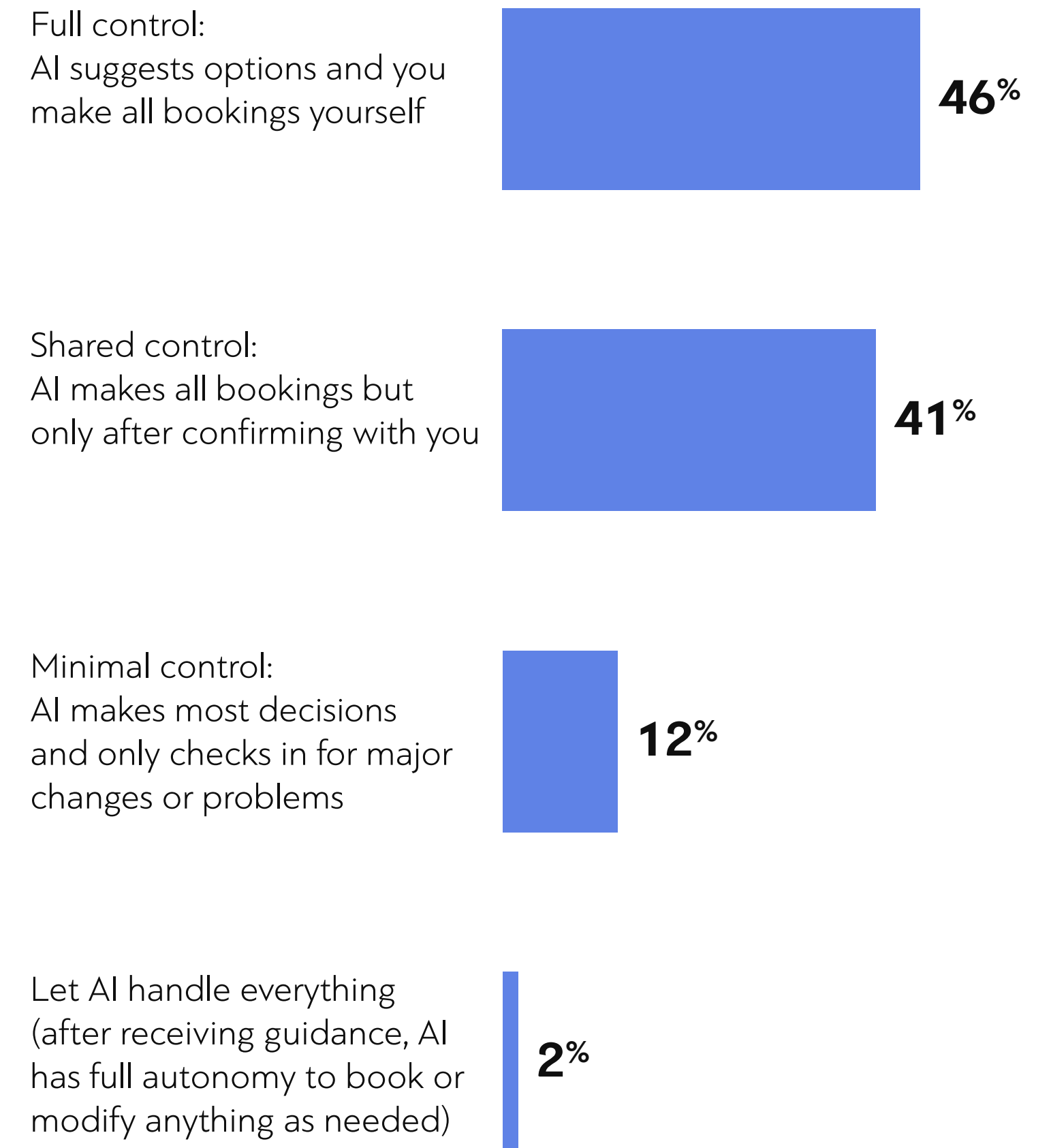
## So much for GenAI, but what about Agentic AI? The answer is yes, but not yet

In a 2025 *State of Travel* report, Skift found that travellers appear to trust AI, but they are not ready to let go of the wheel. Specifically, while 93% of US travellers report confidence in AI tools for providing accurate and reliable travel information, the majority prefer to stay involved in decision-making. Only a small fraction would be comfortable letting AI independently manage their trips, implying that we are not ready for agentic AI – where tools don't just answer questions but take initiative, carry out tasks and make decisions on your behalf – to be part of the consumer travel experience... yet!

Source: Skift Research (2025), *State of Travel 2025* (sample: 1,002 U.S. travellers, June 2025)



## Most travellers still want full or shared control over AI's actions





# GenAI adopters more likely to move on to Agentic AI

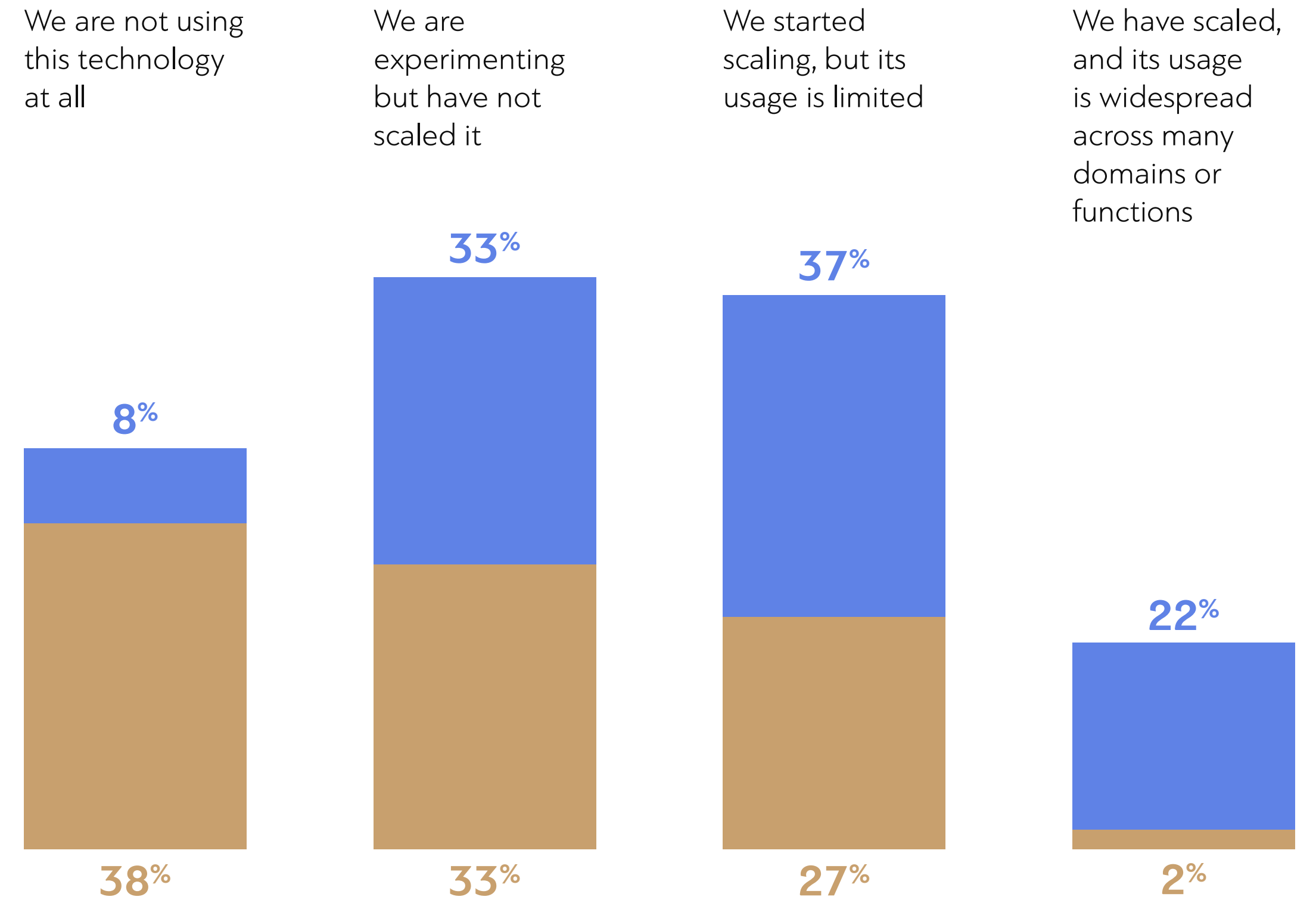
**A McKinsey x Skift survey predicts that Agentic AI could follow the same growth path as Generative AI**

In a 2025 survey for Skift, global consultancy McKinsey predicts that agentic AI could follow the growth trajectory of generative AI, which has been scaling across domains over the past five years. It argues that organisations already using GenAI at scale are significantly more likely to be experimenting with agentic AI.

Source: McKinsey & Company x Skift Research (2025), Remapping Travel with Agentic AI (sample: 86 travel organisations / industry decision-makers)

## Reported use of Generative and Agentic AI in travel organisations

● Generative AI ● Agentic AI





# Employees are using AI, but company strategy is lagging

While leaders across the tourism sector acknowledge AI's potential, many struggle to translate it into tangible value. A coherent AI strategy appears to be the missing link in addressing interconnected skills, data and AI value visibility gaps – the foundations of AI readiness and meaningful visitor-facing use.

*Destination Insight synthesis. Evidence (quantitative and qualitative) drawn from: Group NAO (2025), AI Opener for Destinations (AI strategy gap; selected indicators on skills, culture and data infrastructure); Amadeus (2025), Navigating the Future (data infrastructure readiness); (ETC) (2025), Artificial Intelligence (AI) in Tourism (skills and culture indicators). Base sizes vary by question (e.g.<sup>1</sup> Group NAO n=291 strategy; <sup>2</sup>Group NAO n=254 skills & culture; <sup>3</sup>Amadeus n=306 data infrastructure).*

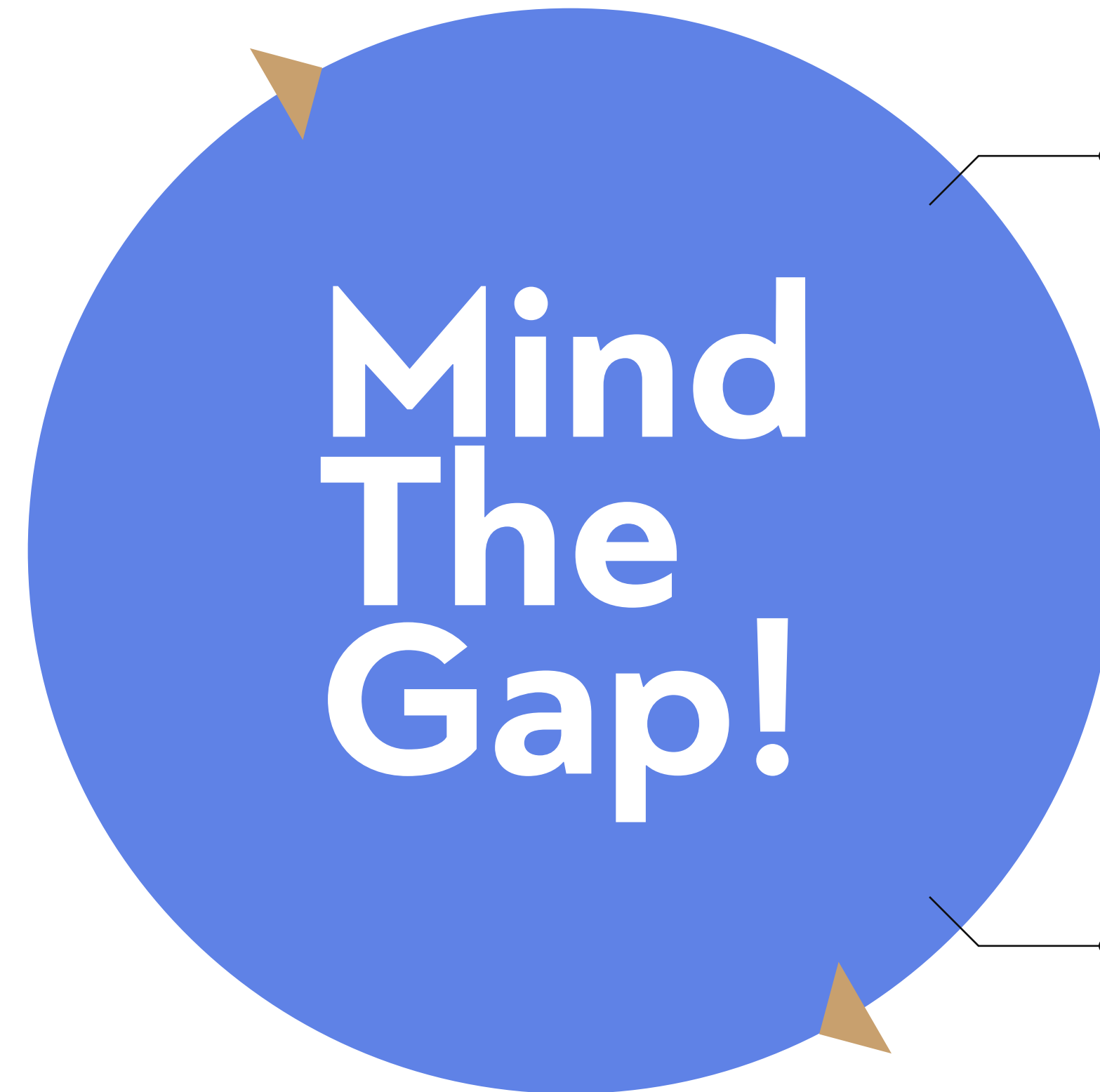
## 1. The AI Strategy Gap

Only 16% of destinations have an AI strategy, while 35% are working on one.<sup>1</sup>

And of those that have or are building an AI strategy: Only 51% include Purpose & Vision, 20% KPIs/Monitoring, 49% Ethical principles, 33% Innovation & Experimentation, 27% New product/service development. Only 17% cover Talent & AI Skills Development and 42% Data Strategy & Infrastructure

## 3. The AI Visibility Gap

Poor visibility or inaccurate framing on AI search tools can reduce demand quality and conversion, weakening a destination's ability to steer visitor flows in line with priorities and capacity.



## 2a. The AI Skills & Culture Gap

- 58% destination professionals say their organisation lacks AI expertise<sup>2</sup>
- Only 17% of Europeans and 29% of North Americans report structured AI upskilling<sup>2</sup>
- AI adoption appears to be bottom-up, experimental and tactical rather than systemic

## 2b. The AI Data Infrastructure Gap

- 56% of tech leaders across travel sector say infrastructure systems are not ready<sup>3</sup>
- 53% cite poor internal data management and organisation<sup>3</sup>





## ESPRESSO INTERVIEW

## How to build an AI Strategy

Signe Jungersted, CEO of Group NAO – a Copenhagen-based strategy and innovation consultancy behind initiatives like AI Opener for Destinations, which helps DMOs understand AI and build internal capacity – shares her insights on how to get started with an AI strategy.



### What are the essential structures for destinations starting their AI journey?

Across the destinations and organisations we have worked with, the AI journey typically starts by identifying internal AI ambassadors and enthusiasts. They guide the initial journey of exploration and experimentation.

Then, the organisations typically launch broader, more structured upskilling of their teams, while also outlining their AI strategy (this is what we want to achieve with AI) and policies or guidelines (this is how we work with AI).

In our 2025 survey of 311 destination professionals, we can see that destination organisations with clear internal processes also demonstrate higher AI confidence and stronger AI familiarity among employees.

### AI can scale content, but identity comes from authenticity and cultural nuance. How can we use AI without losing our destination voice?

This is a strong concern among many destinations and tourism sector professionals. I think it's about finding a way in which AI serves your purpose and values. Concretely, this would also mean treating AI more as your tool, but not the final author. Set clear guidelines and editorial principles – for how to maintain cultural nuance and uniqueness, source rules, human review. With the right guardrails in place, AI can be your creative partner, not your creative substitute.

### What governance principles should every DMO bake into their AI strategy?

Interestingly, when governance is unclear, people also feel less confident about using AI. We can see from our research that many destination professionals worry

about data privacy, but only half of their AI strategies include ethical guidelines. I would say start with purpose (“why are we using AI?”), then transparency (“when and how do we use AI”), accuracy checks (with clarity on sources, review steps, red flags), and established

**“With the right guardrails in place, AI can be your creative partner, not your creative substitute.”**

shared data discipline (“what data is allowed to be shared where?”). With strong governance in place, you reduce hesitation and speed up responsible adoption.

### How should DMOs prepare for Agentic AI?

With agentic AI on the rise, travellers' AI will visit not your website, but

your data. So, concretely DMOs need to prepare to be discoverable by agents (that look for patterns in data) – having AI-ready, structured, updated and accessible data, strong accuracy, and the ability to integrate with other systems and platforms will be the new way of making sure your destination reaches travellers in their search.

In other words, DMOs need to prepare their content (and data) to shape how agents represent your destination to travellers.

Interestingly, from our 2025 survey as part of the AI Opener for Destinations programme, we can see that 82% of DMO professionals actually believe that AI will transform traveller planning, so hopefully many of them are already preparing. Or at least learning by doing.



## Your AI Strategy Checklist

Check ✓ Note /

### Strategic Intent

What traveller-related problems need to be solved (eg personalised itineraries, pricing)?

How will your AI strategy support local stakeholders?

Where can AI enhance workflow efficiency and decision-making?

Are your AI and destination strategies aligned?

### Content Quality & Destination Voice

Is your content nuanced, practical and emotionally resonant to travellers?

Does it preserve your cultural integrity and lived experience?

Does it preserve trust or are you just saving costs?

Do you prioritise primary data (original research, first-hand expertise and proprietary insights) or do you rely on generic, third-party or recycled content?

### Data Infrastructure

Do you have the essential infrastructure to facilitate more efficient workflows / decision-making?

Is your data structured, accessible and authoritative enough to be surfaced and trusted by AI platforms?

### Collective Intelligence and Ethics

Have you defined the people across teams to ensure coherent knowledge diffusion internally?

Do you have clear rules on accuracy, rights, cultural integrity and accountability?

Do you encourage shared standards, knowledge exchange and cooperative infrastructure across the destination ecosystem?

How do you ensure transparency, accessibility, inclusivity and sustainability principles across use cases?

### Metrics & Success

As organic site traffic unavoidably declines, do you still measure website clicks?

Are you shifting to evaluate whether your message is present and consistent across platforms?

Are you measuring what travellers understand, save, ask and act on – or only return on investment?

Source: Destination Insight synthesis (informed by DTTT insights, wider industry research, and practical experience)





## Best-practice examples of tourism-related AI strategies

### Destination Canada Aurora AI – Canadian Tourism Data Collective

**Scope:** Data Infrastructure & Collective Intelligence, National level

#### What it is and why it was set up

- AI-powered intelligence layer built on top of Canada's national tourism data infrastructure, designed to make complex insights accessible to DMOs, governments and industry partners.
- Combines trusted tourism, economic and behavioural datasets with generative AI tools to help stakeholders analyse trends, model traveller behaviour and answer strategic questions in natural language.
- Developed to democratise access to high-quality data, reduce fragmentation and provide a shared foundation for evidence-based decision-making across Canada's visitor economy.

More here [→](#)

#### What it changes

- Simplifies insight generation, allowing users to query large datasets conversationally without advanced analytical skills.
- Supports smarter planning, forecasting and product development through tools such as Aurora Search and Traveller Twin, helping destinations understand audiences and opportunities more precisely.
- Strengthens collaboration by giving all tourism stakeholders access to the same intelligence ecosystem, enabling a more coordinated, inclusive and competitive national tourism strategy.



## Failte Ireland Cross-Functional AI Council

**Scope:** Governance & Culture, Organisational level

### What it is and why it was set up

- Brings together people from MarComms, Digital, Visitor Engagement and IT.
- Established to break down silos, create shared accountability and ensure AI is treated as an organisation-wide capability rather than a marketing project.
- Supports teams working with unfamiliar technologies and allows use cases to be identified across different functional areas.

### What it changes

- A structure that encourages cross-pollination of ideas, allowing solutions created in one area to be adapted elsewhere and generating wider organisational value.
- Strengthens governance, improves coordination and, despite a slower start, ultimately speeds up deployment because teams are aligned and communicate regularly.



## ESPRESSO INTERVIEW

## How to launch an AI Chatbot

In mid-2024, Marketing Greece introduced an AI travel assistant to Discovergreece.com. There was no blueprint and plenty of challenges, but with the support of Matador Network's GuideGeek technology, Pythia was born — and has been answering user queries on Greek holidays ever since. The Digital Products team shares the experience.

**What was the lightbulb moment that led to Pythia?**

Beyond the clear industry trend toward AI chatbots, we saw an opportunity to bridge the gap between Discovergreece.com's largely inspirational content and the actual booking of activities. An assistant could offer personalised suggestions based on users' needs and intentions — and, importantly, generate richer data insights than traditional on-site searches.

**What were your biggest challenges?**

With no blueprint to follow, we had many initial concerns, including brand safety and the risk of AI hallucinations. But the real initial challenge was the unclear legal framework. A simple 6-page contract expanded to 20 pages to cover EU data privacy, GDPR and liability issues. It was uncharted territory — and so a major success when we got there.

**What priorities did you set for an AI assistant?**

From day one, our priority was to make our own content the model's single source of truth. We allowed limited access to Matador's travel content and trusted external links for practical queries (museum tickets, flights, ferries etc), but the goal was clear: Pythia should reflect the depth, quality and values of responsible travel embedded in Discovergreece.com.

**What are the biggest lessons you've learned?**

There have been more than we can count. The biggest jumps in Pythia's quality came from advances at the LLM level — from GPT-3.5 to 4 and 4o. But likewise, the more feedback we gave Matador post-launch, the better the results. We've also seen in real time how SEO-style keyword searches are being replaced by more natural, conversational queries. Above all, the experience reinforced that content is still king:

the depth, accuracy and range of your content directly shape the quality of AI-generated answers — especially when you want to address seasonality and help spread visitors beyond classic landmarks and potentially congested sites, improving the experience for both travellers and locals.

**What is your best advice for others launching a chatbot?**

Finding the right partner is crucial. Beyond the technology, you need someone flexible and willing to go back and forth. Treat the chatbot as a chance to leverage, reuse and adapt your website content. But above all, don't hesitate. The only way to learn is by doing. User interfaces are changing, user behaviours are changing — and AI is at the centre of that shift. The real risk is being left behind.

***“User interfaces are changing, user behaviours are changing — and AI is at the centre of that shift. The real risk is being left behind.”***





## Methodology

This report is a structured synthesis. We reviewed a broad evidence base, identified the strongest signals, and translated them into decision-relevant insights to support informed destination decision-making.

Frameworks in Traveler Pulse and Destination Cases were developed through synthesis of desk research across industry and institutional publications, with selected academic inputs, alongside practical experience working with destinations. Rather than treating sources as directly comparable, these frameworks help organise patterns, tensions and signals across the research.

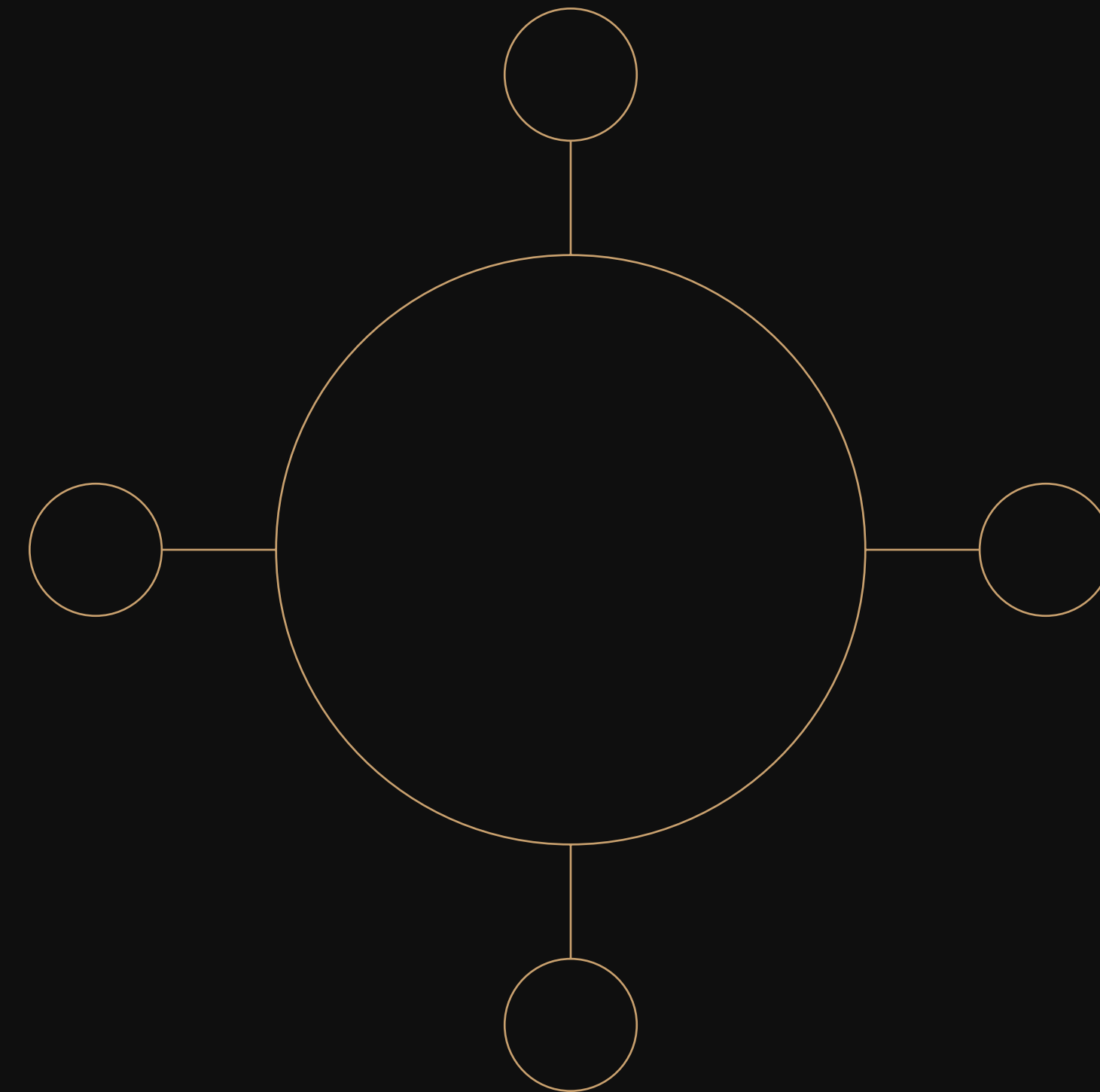
Themes across the report were elevated through triangulation and prioritised when multiple independent sources aligned, or when consistent signals appeared across different evidence types, including surveys, behavioural indicators and destination cases. Given the report's scope, we present directional insights intended to support reflection and strategic discussion, rather than predict outcomes. As the evidence base is international, frameworks are presented as adaptable lenses to be interpreted and applied by stakeholders within their local context.

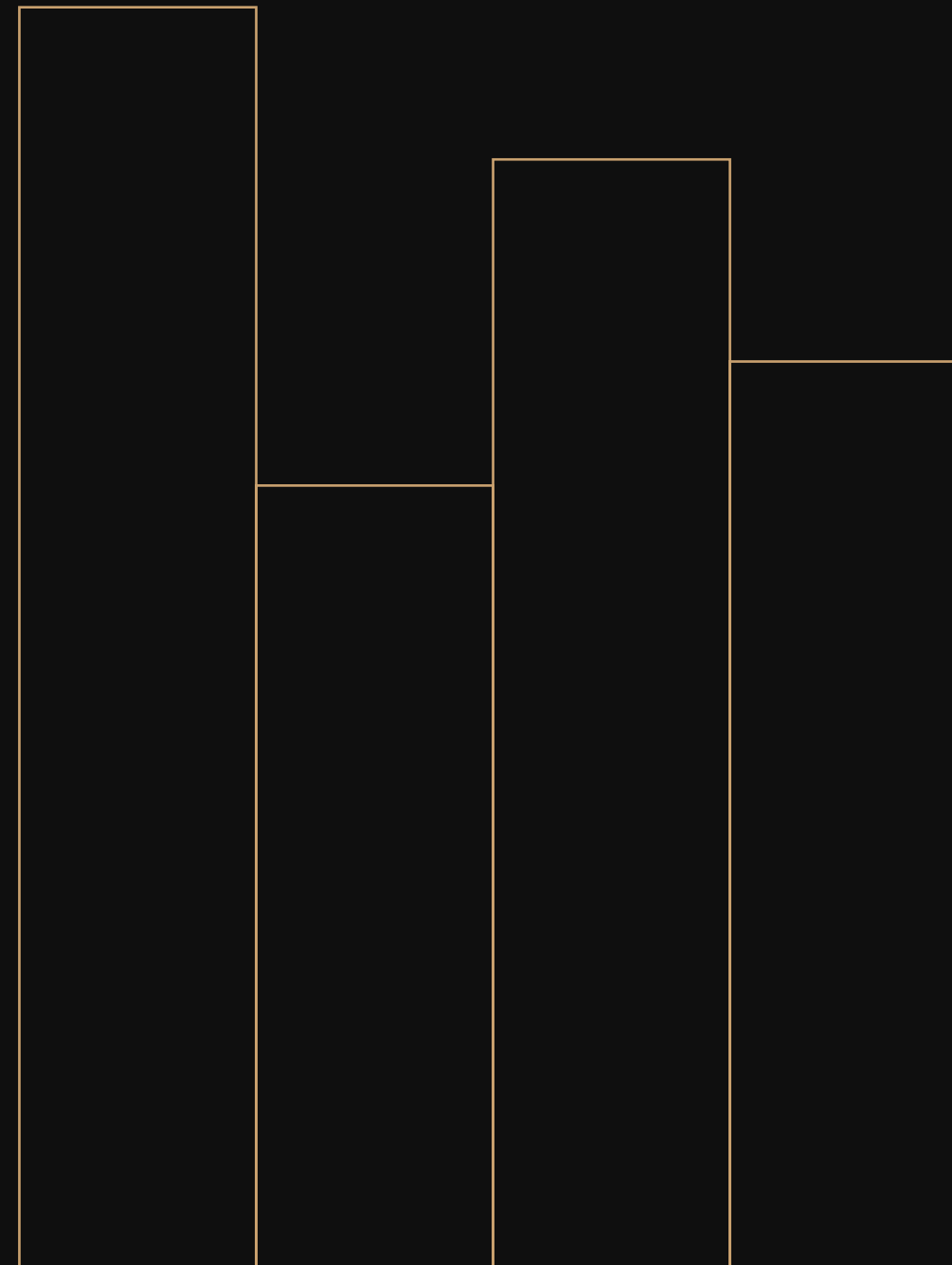
## Source inclusion criteria

Sources were selected to ensure reliability and usability for decision-makers. We prioritised established travel and tourism publishers that provide clear methodological information and recent evidence, mainly from 2024-2026. Each source was assessed for clarity on geographic scope and target audience and included only when it contributed directly to the report's focus on traveller behaviour, destination management and marketing, or longer-term shifts shaping tourism. Promotional content and unsupported claims were excluded.

## Limitations and interpretation

Findings reflect the definitions, sampling frames, and methods used by the original sources. Cross-report comparison is shaped by differences in geographies, fieldwork timing, question wording, and target populations. Economic conditions, geopolitics, climate events, and technology adoption may shift traveller behaviour after publication. Coverage may over-represent markets with stronger research availability.






- **ALL Accor × Globetrender** (2026), Experiential Travel Trends 2026
- **Amadeus** (2025), Connected Journeys: How Technology Will Transform Travel in the Next Decade
- **Amadeus × Globetrender** (2026), Travel Trends 2026
- **Booking.com** (2026), Travel Predictions 2026
- **CityDNA × Simpleview** (2025), The Score Is Not the Story: A Critical Reflection on Sustainability Indexes and Certifications in City Tourism Management (VivaCITY project)
- **Digital Tourism Think Tank (DTTT)** (2025), DTTT insights and publications.
- **European Travel Commission (ETC)** (2025), Monitoring Sentiment for Intra-European Travel (Wave 21: Spring/Summer 2025; Wave 23: Autumn 2025/ Winter 2026)
- **European Travel Commission (ETC)** (2025), Futureproofing European Tourism through Scenario Planning and Strategic Foresight
- **Expedia Group** (2026), Unpack '26
- **EY** (2025), EY Future Travel Behaviors Observatory: How Travelers' Expectations and Behaviors Are Changing
- **Group NAO** (2025), Beyond the Hype: Time to Get Practical – AI Opener for Destinations. 2025 Survey on Destinations' AI Adoption & Impact
- **Hayden, M., McIntosh, A., & Gillovic, B.** (2024), Inclusive destination management strategies. In *Tourism Destination Development* (pp. 333–358). doi:10.1515/9783110794090-016
- **Hilton** (2026), Hilton's 2026 Trends Report
- **Korbiel, K., Gmyrek, K., & Kruczek, Z.** (2025), A review of research on inclusive tourism: Clusters of thematic links and research gaps. *Sustainability*, 17, 6521. doi:10.3390/su17146521
- **Mastercard Economics Institute** (2025), Travel Trends 2025: Purpose-Driven Journeys
- **Skyscanner** (2026), Horizons 2025–2026
- **Sojern** (2026), State of Destination Marketing 2026
- **Trip.com Group × Google** (2025), Why Travel?
- **World Travel Market (WTM)** (2025), WTM Global Travel Report 2025
- **World Economic Forum** (2025), Travel and Tourism at a Turning Point
- **World Travel & Tourism Council (WTTC)** (2025), Managing Destination Overcrowding: Call to Action from the Travel & Tourism Private Sector






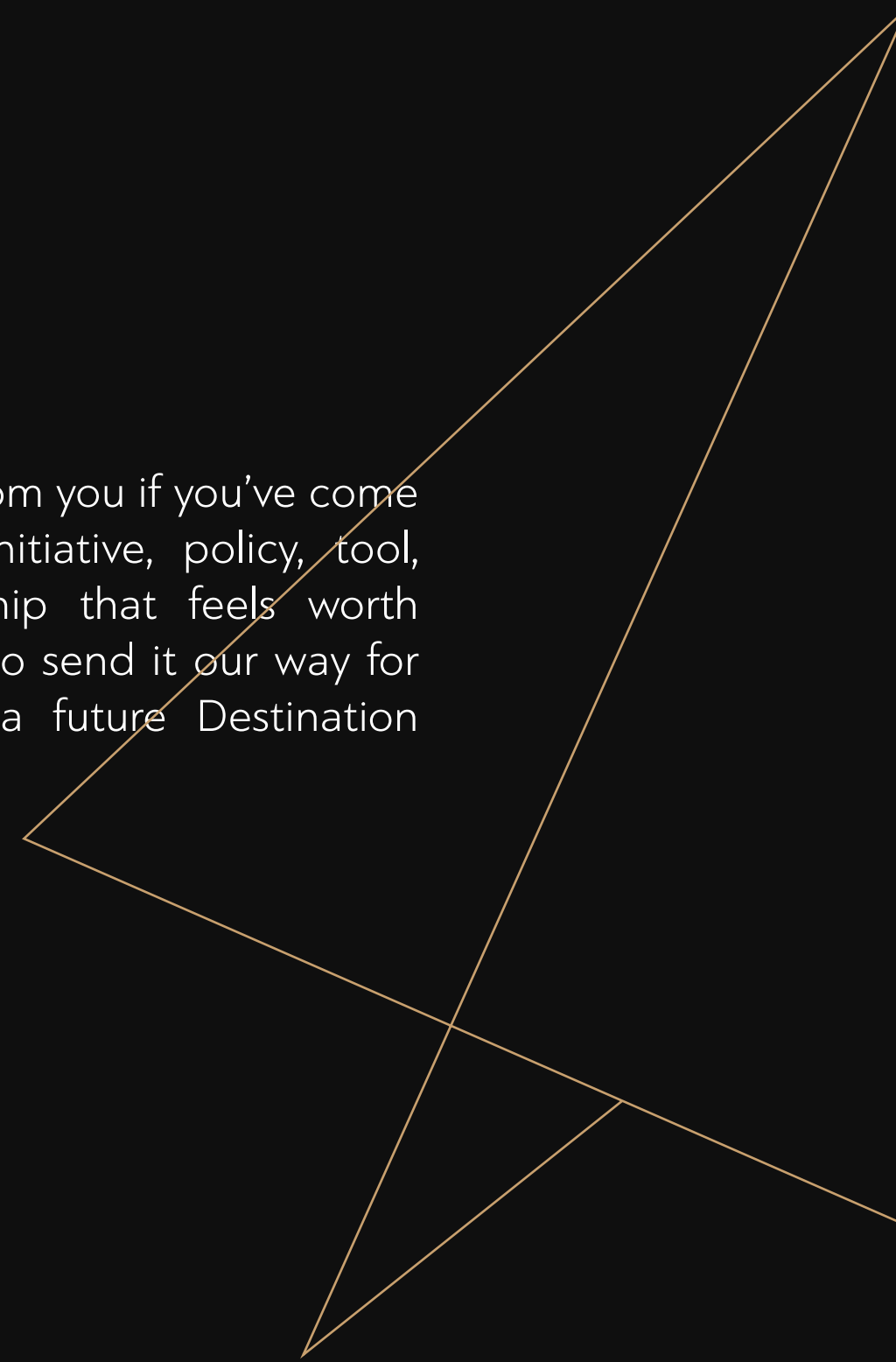
# That's it from us. Now it's over to you!

We hope you've found *The Outlook 2026* insightful and that it has helped you see your destination in a new light. We'd now love to hear from you: what resonated with you, and how do the ideas explored here connect to your own context?

Your feedback 

We'd also like to hear from you if you've come across a destination initiative, policy, tool, campaign or partnership that feels worth sharing. Don't hesitate to send it our way for potential inclusion in a future Destination Insight newsletter.

Send us mail 



A graphic consisting of a central white-outlined rectangle containing the text 'MARKETING GREECE'. Two thin, light-colored lines extend from the top-left and bottom-right corners of the rectangle, meeting at a point in the upper-left quadrant of the page to form an arrow shape.

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