

Irish Tourism and the AI Journey

Irish Tourism Industry Confederation The Impact of Artificial Intelligence on Irish Tourism

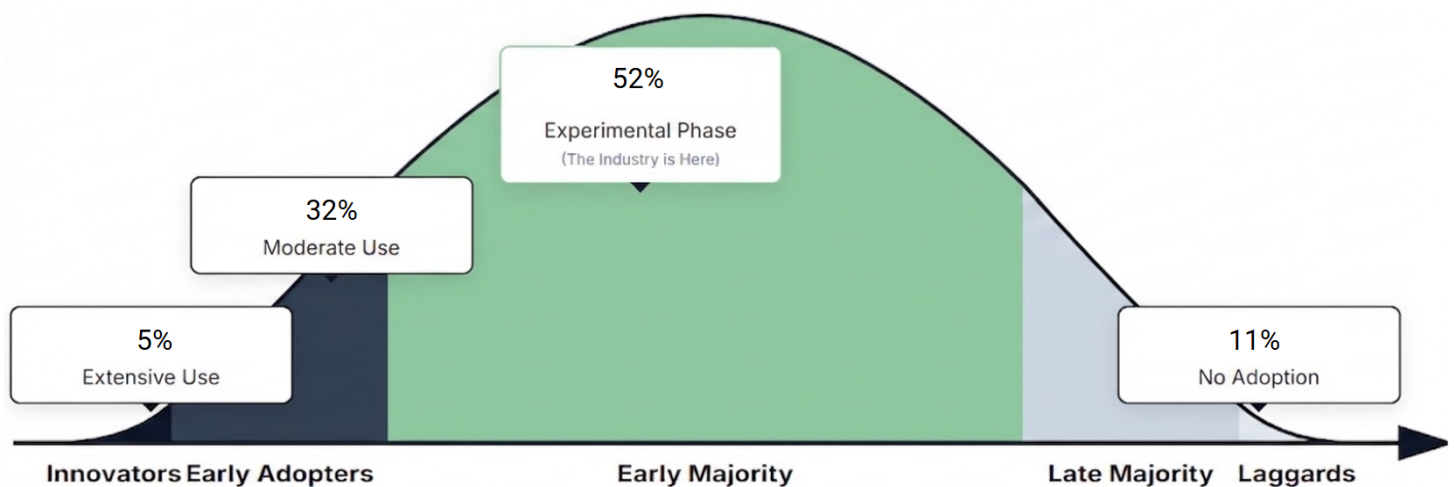


Executive Summary

Artificial Intelligence is reshaping how the world discovers, plans and experiences Ireland. This report, commissioned by the Irish Tourism Industry Confederation (ITIC), examines how AI is affecting Irish tourism today, where the sector stands in its adoption journey, and what must be done to ensure Ireland captures the opportunities while protecting what makes its tourism product distinctive.

This is the first report in a series on AI in Irish tourism - a fast-changing environment that will require ongoing study and review.

The findings draw on an industry survey of 73 organisations associated with ITIC, in-depth expert interviews with national and international specialists, a review of Ireland's national policy landscape, and extensive desk research into global best practice.



The picture is clear. Irish tourism is engaged with AI but not yet fully prepared for it. Almost three in five Irish tourism organisations (62%) are using AI in some form, but just over half describe their adoption as early or experimental (52%). Only 5% have achieved extensive integration. Just 15% have developed a dedicated AI strategy. The industry recognises that AI is essential to its future competitiveness (66%), but it has not yet matched that belief with the plans, skills or infrastructure to act on it.

The sector is caught in a Content Trap. AI use is concentrated overwhelmingly on generative tasks: copywriting (78% of AI users) and marketing (53%). Operational applications that could

address the sector's most pressing challenges, including customer service (22%), pricing and revenue management (20%), and demand forecasting, remain significantly underutilised.

Skills, not cost, are the primary barrier to adoption. The top obstacles to adoption are skills and awareness (64%) and time and capacity (59%). Cost ranks fifth (32%), behind training availability (41%) and data quality (36%). This finding challenges the assumption that AI adoption is primarily a funding problem. The industry needs education and practical support before it needs capital.

The Irish welcome is the central concern. The industry is almost exactly split on whether AI threatens the Céad Míle Fáilte: 49% are worried, 51% are not. This is not a majority view in either direction. It is a genuinely polarised sector, united only in the conviction that the personal, human character of Irish tourism must be protected. The report's central argument is that this is a false choice: AI deployed thoughtfully, handling the transactional while freeing people for the exceptional, can strengthen the Irish welcome rather than diminish it. High Tech, High Touch.

The policy environment is supportive but execution is lagging. Ireland's National Tourism Policy Statement, the National Digital and AI Strategy 2030, and the AI Advisory Council recommendations all name AI as a priority. The frameworks are in place. What is missing is the sector-specific implementation, funding and coordination to translate national ambition into practical action for the 46,000 tourism enterprises, 90% of them SMEs, that comprise the industry.

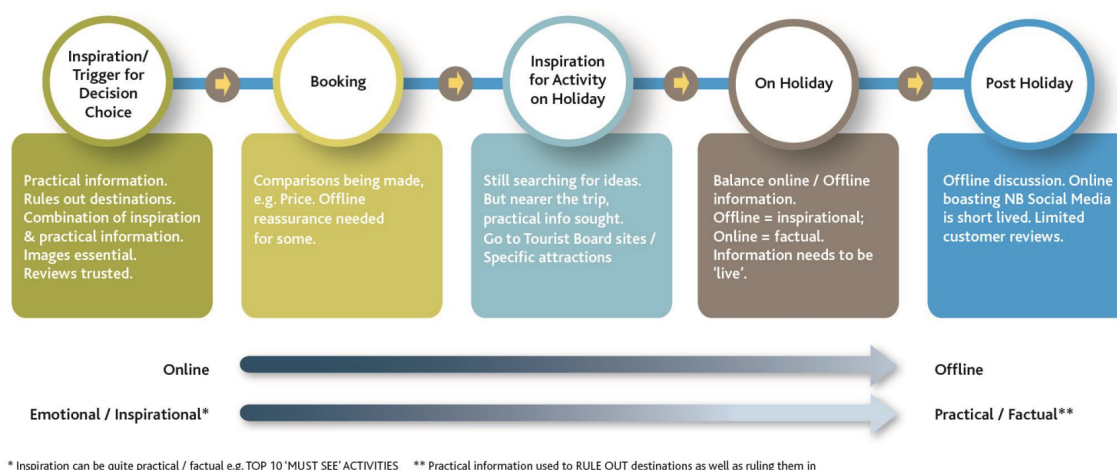
This report presents ten recommendations, centred on the development of a funded, time-bound AI and Tourism Action Plan; the creation of a National Tourism Data Infrastructure; a dedicated SME AI Adoption Programme; investment in Generative Engine Optimisation; and the protection and cultivation of the human dimensions of Irish hospitality. The industry is ready to act. It needs direction, support and urgency.

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Introduction: Irish Tourism and the AI Revolution

One of the best ways to think about how AI has impacted the tourism industry is to look at the path to purchase customer journeys model. The path to purchase journey is a useful model for visualising a visitor's journey throughout their tourism experience from being 'triggered for a holiday' to 'post holiday' and several steps in between. When we look at the stages of this model, we can see clearly how both information technology and Artificial Intelligence have disrupted our industry. Fifty years ago, the path to purchase model below was entirely dominated by analogue experiences provided by humans.



Why AI Will Close the Final Gaps in the Digital Takeover of the Path to Purchase Journey Model:

Now the path to purchase model, from inspiration to post-holiday, is almost entirely integrated into the digital revolution. Almost. Because if we look honestly at the model, we can still identify the moments that technology has not yet fully colonised. The spontaneous recommendation from a local. The phone call to check if the restaurant has a table. The moment at the hotel desk when someone mentions a festival happening in the next village that is not on any website. These gaps, these irreducibly human moments in the journey, are the ones that have defined Irish tourism's competitive advantage and the ones that AI is now beginning to reach.

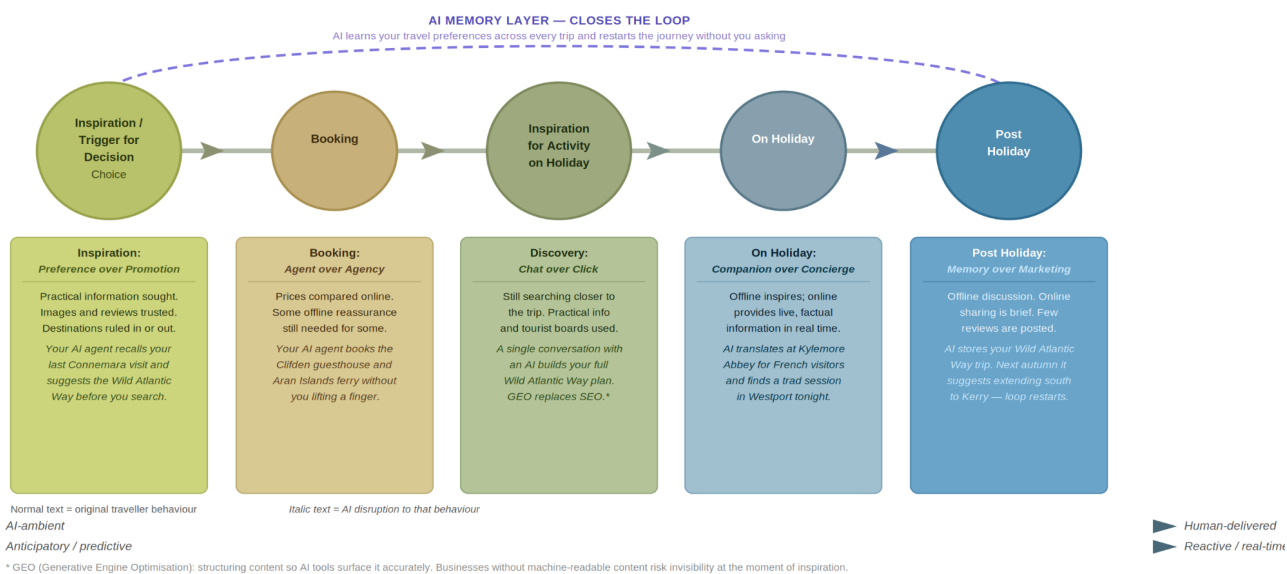
What makes AI different from the waves of digital technology that preceded it is not just speed or scale, it is intent. Earlier information technology required the traveller to come to it. You visited the website, ran the search, scrolled through the results. The technology was passive. It waited to be asked. AI does not wait. It anticipates, it synthesises, it recommends, and increasingly it acts. The shift from the traveller as an active searcher to the traveller as a

recipient of curated, AI-generated suggestions closes the last meaningful gap between technology and the analogue, human-led tourism experience of fifty years ago.

Tourism Ireland's own research puts the scale of this shift in concrete terms: over 30% of overseas audiences have already used generative AI to build a travel itinerary or seek inspiration for a trip. Among US visitors, Ireland's most valuable overseas market, that figure rises to one in two.

What this means in practice is that the moment a potential visitor first imagines coming to Ireland, the moment of inspiration that sits at the very top of the path to purchase, is increasingly mediated not by a Google search, a travel magazine or a friend's recommendation, but by a conversational AI tool that synthesises whatever it knows about Ireland and presents a confident, curated answer. If Irish tourism businesses, destinations and experiences are well represented in that AI-generated response, they enter the traveller's consideration. If they are not, they do not exist for that traveller at all. The path to purchase now begins in a conversation with a machine, and Irish tourism must learn to be present in that conversation.

The rest of this report examines what that means for our sector in practical terms: how Irish tourism businesses are currently using AI, what the biggest barriers and risks are, what best practice looks like internationally, and what Ireland needs to do to ensure that the technology which is reshaping how the world discovers travel works for our industry, rather than around it.



Agent Memory Means that The Path to Purchase Model becomes a Path to Purchase Loop:

There is one further dimension to this shift that makes AI genuinely unlike anything that preceded it: memory. Previous digital tools treated every search as a fresh transaction. The traveller began again from zero each time, re-entering their preferences, re-filtering the results, re-teaching the platform what they liked. AI agents are beginning to change this in a

fundamental way. A traveller who uses an AI assistant regularly builds, over time, a detailed and evolving profile of their preferences, habits and history. The places they have been, the experiences they valued, the types of accommodation they chose, the activities they searched but never booked. When that traveller next considers a trip, their AI agent does not start from scratch. It starts from everything it already knows about them. The implication for Irish tourism is significant. A visitor who loved the Burren in 2023 and a quiet coastal drive in West Cork in 2024 may find that in 2026, before they have consciously decided to travel at all, their AI agent is already surfacing ideas for a return. The path to purchase stops being a linear journey from inspiration to booking and becomes something closer to a circle, with AI maintaining a continuous, ambient relationship between the traveller and the destinations they love. For Ireland, a country that has always depended on the emotional loyalty of repeat visitors, this is potentially one of the most powerful tools the technology can offer. But only if Irish tourism businesses are visible, accurate and well-represented in the AI systems that are quietly building those relationships on their visitors' behalf.

The chapters that follow examine each dimension of this transformation in the Irish context: what the industry survey reveals, what the experts say, what international benchmarks demonstrate, and what Irish tourism must do to respond.

A Glossary of Key AI Terms for Tourism

The following glossary defines the AI terminology most relevant to Irish tourism. It is designed for senior leaders and practitioners who may encounter these terms in policy documents, technology conversations, and industry discussions.

A

Agentic AI AI that can plan and carry out multi-step tasks independently on a user's behalf. In travel, an AI agent might search, compare and complete a booking for a trip to the Wild Atlantic Way without the visitor making each decision manually. As agentic tools become common, Irish tourism businesses that are not set up to transact digitally risk being bypassed entirely.

Agent Ready A tourism business is 'agent ready' when its products, availability and pricing can be found and booked by AI systems acting on behalf of travellers. With over 80% of visitors already researching and booking online, and AI increasingly mediating that process, being agent ready is fast becoming a baseline requirement for Irish tourism enterprises.

Algorithm A set of rules that an AI system uses to process data and reach a decision. Algorithms already influence which Irish accommodation, experiences and destinations appear in search results, recommendation engines and, increasingly, AI-generated travel itineraries.

Automation Using AI or software to handle repetitive tasks without manual effort. In Irish tourism – where 90% of enterprises are SMEs with limited staff resources – automation of tasks such as review responses, booking confirmations and seasonal pricing updates can free up time for the personal, guest-facing work that defines the Irish visitor experience.

C

Chatbot An AI tool that answers questions or guides transactions via text or voice. For Irish tourism businesses, chatbots can handle visitor queries outside of office hours – a practical solution for small operators who cannot staff a 24-hour front desk. Quality varies widely; poorly designed chatbots can undermine the warmth of the Irish welcome rather than extend it.

Computer Vision AI that interprets images and video. Applications relevant to Irish tourism include visitor flow monitoring at busy heritage sites, automated quality checking of accommodation photography on platforms like Ireland.com, and accessibility auditing of tourism environments.

D

Data Governance The policies and processes that control how data is collected, stored and used. Ireland's National Digital and AI Strategy 2030 places responsible, people-centred data governance at the heart of AI adoption. For tourism businesses, this means being clear with visitors about what data is collected and how it is used, in line with GDPR.

Dynamic Pricing AI-driven pricing that adjusts rates in real time based on demand, seasonality and competitor activity. Increasingly used by Irish accommodation and transport providers, dynamic pricing can improve revenue management but raises questions about affordability and fairness for visitors, particularly outside the peak summer season.

E

EU AI Act EU legislation that classifies AI systems by risk level and sets binding requirements for their development and use. Irish tourism businesses using AI tools – whether for guest-facing chatbots or internal HR systems – will be subject to its provisions. Ireland's National Digital and AI Strategy 2030 identifies the AI Office of Ireland as the national enforcement authority.

G

Generative AI AI that creates new content – text, images, video or audio. Tourism Ireland research shows that over 30% of overseas visitors have already used generative AI to research Ireland or build itineraries. For Irish tourism businesses, generative AI offers practical tools for producing marketing copy, translating content and drafting responses to reviews – but outputs must be checked for accuracy, tone and consistency with Ireland's brand.

Generative Engine Optimisation (GEO) The practice of structuring digital content so that AI tools such as ChatGPT or Google Gemini surface it accurately when answering visitor queries. As travellers shift from traditional search engines to conversational AI, GEO is becoming as important as SEO for Irish tourism destinations and businesses. Fáilte Ireland has identified AI-optimised content as a key priority for platforms like Ireland.com.

GDPR General Data Protection Regulation. The EU framework governing personal data, including data used by AI systems. Irish tourism businesses using AI for personalisation, chatbots or customer analytics must ensure they have appropriate consent and data handling practices in place.

H

Hallucination When an AI system generates confident but incorrect information. A significant risk for Irish tourism: if AI tools provide visitors with inaccurate opening hours, directions or experience descriptions, the consequences range from disappointed visitors to reputational damage for a destination. Ensuring Irish tourism content is accurate, structured and up-to-date is a key defence against AI hallucination.

Human-in-the-Loop An AI system that keeps a human involved at key decision points. In Irish tourism, this principle is particularly important for guest-facing communications, where the personal, human dimension of the Irish welcome must be preserved rather than fully delegated to automated systems.

L

Large Language Model (LLM) An AI trained on vast amounts of text that can understand and generate human language. LLMs power tools like ChatGPT and Microsoft Copilot. When a potential visitor asks an AI tool to recommend somewhere to stay in Connemara or things to do in Kerry, it is an LLM that constructs the answer – drawing on whatever information about Irish tourism it has been trained on or can access.

M

Machine Learning AI that learns from data and improves over time without being manually reprogrammed. Relevant Irish tourism applications include demand forecasting for accommodation, predictive analytics for visitor flows at heritage sites, and personalised content recommendations on destination platforms.

N

Natural Language Processing (NLP) AI that enables computers to understand and respond to human language. NLP underpins chatbots, real-time translation tools, sentiment monitoring of visitor reviews, and voice-based visitor information services. For a multilingual inbound tourism market, NLP-powered translation is a particularly practical application for Irish tourism businesses.

P

Personalisation Using AI to tailor content and recommendations to an individual visitor based on their preferences and behaviour. Applied thoughtfully, personalisation can help Irish tourism businesses surface relevant experiences and encourage return visits. It requires clear data governance and must not come at the expense of the spontaneous, human discovery that is central to the Irish tourism experience.

Prompt The instruction given to an AI system. Tourism staff who know how to write effective prompts – for generating content, summarising reviews or drafting itineraries – will get substantially better results from AI tools. Prompt literacy is a core component of the practical AI skills Irish tourism businesses need to develop.

R

Responsible AI The principled development and use of AI in a way that is transparent, fair and privacy-respecting. Ireland's National AI Strategy emphasises trust and people-centred innovation as foundational values. For Irish tourism, responsible AI means deploying technology in ways that enhance rather than erode visitor trust and that protect the authenticity of the Irish experience.

S

Sentiment Analysis AI that automatically assesses the tone of written content such as online reviews or social media posts. Destination management organisations and large tourism operators use sentiment analysis to monitor visitor satisfaction at scale – tracking perceptions of Irish regions, experiences and brands without reading every individual review.

Shadow AI The use of AI tools by employees without organisational knowledge, oversight or policy. Already prevalent across the Irish tourism sector, shadow AI ranges from staff using ChatGPT to write website copy to managers using AI tools to process customer data. It creates real risks around data privacy, accuracy and brand consistency that tourism businesses need to address through clear internal guidance.

V

Virtual Assistant A more capable form of chatbot that can handle complex, multi-turn conversations, complete transactions and escalate to human staff. As visitor expectations of digital responsiveness rise, virtual assistants offer Irish tourism businesses a means of providing a consistent and helpful digital welcome – provided they are well designed and do not replace genuine human interaction at moments where it matters most.

National Policy Overview

Ireland's approach to artificial intelligence is shaped by an increasingly coherent and ambitious national policy architecture. Three key documents define the current strategic environment: the National Tourism Policy Statement: A New Era for Irish Tourism (December 2025), the National Digital and AI Strategy 2030: Digital Ireland: Connecting our People, Securing our Future, and the AI Advisory Council Recommendations: Helping to Shape Ireland's AI Future. Taken together, these documents signal a clear governmental intent: AI is not peripheral to Ireland's economic agenda, it is central to it. For the tourism sector, understanding how these national frameworks intersect is essential to making the case for investment, positioning industry priorities, and ensuring that tourism's specific needs are adequately addressed in the broader policy landscape.

Tourism Policy: A New Era for Irish Tourism (December 2025)

Published by the Department of Enterprise, Tourism and Employment under Minister Peter Burke, this statement sets out the Government's five-year strategic framework for the tourism sector to 2030. It establishes ambitious headline targets: overseas tourism revenue to reach €9 billion by 2031 (a 50% increase on 2024), combined overseas and domestic revenue to grow from €9.6 billion to €14.8 billion, and at least 250,000 people employed in tourism. The target most directly relevant to this report is that at least 90% of tourism-related SMEs should adopt advanced digital tools by 2031.

The policy explicitly names AI as a priority in its Digital Transition Strategy (Section 4.8), noting that over 30% of overseas audiences have tried generative AI to gain travel inspiration or build itineraries, and that 80% of visitors now research and book their holidays online. The statement calls on tourism agencies and relevant stakeholders to develop and implement a sector-wide digital strategy that supports tourism businesses in adopting digital tools and AI, and commits to enhancing Ireland's global visibility through continued investment in AI-optimised platforms. It also highlights the role of Ireland's four European Digital Innovation Hubs as a support mechanism for SMEs navigating the transition.

National Digital and AI Strategy 2030 – Digital Ireland

Ireland's updated National Digital and AI Strategy sets out the Government's vision to strengthen Ireland's position as a digital leader and global hub for AI innovation by 2030. Structured across five mutually reinforcing ambitions: Apply, Grow, Invest, Lead, and Empower, the strategy commits to 20 high-level objectives supported by 90 deliverables across Government. Key commitments include a new targeted strategy to drive AI adoption across key sectors of the enterprise base, an Enterprise Ireland AI Adoption Roadmap differentiated by sector, an AI and digital awareness campaign for SMEs, and the establishment of an AI Office of Ireland. The Strategy also establishes an Observatory for Business AI Readiness (OBAIR) to develop intelligence on AI use by enterprise across Ireland.

The Strategy's emphasis on trustworthy, people-centred AI, on digital inclusion, and on ensuring that no one is left behind in the digital transition is directly relevant to tourism. It explicitly recognises that transformational change will bring disruption and commits to supporting workers

to navigate the impacts of potential job displacement through agile and accessible skills supports. Ireland's EU Council Presidency in 2026 is being used to host an International AI and Digital Summit, signalling the Government's ambition to position Ireland as a leading voice in European AI governance.

AI Advisory Council Recommendations

The AI Advisory Council has issued a set of recommendations identifying critical areas where Ireland can accelerate AI adoption, encourage responsible innovation, and reinforce its position in the global AI ecosystem. The Council warns that many prevailing economic models may be underestimating the exponential trajectory of AI, and calls on Government to plan not only for anticipated growth but for scenarios that may exceed current expectations. Its recommendations span six areas: the future of skills and work; the AI ecosystem; AI literacy and education; AI sovereignty and infrastructure; biometrics and public services; and AI and Ireland's creative sector.

The Council's recommendation for a real-time, publicly available AI Observatory to deliver data and insights on labour market dynamics, capital flows, skills development, and public attitudes is particularly relevant to tourism, which currently lacks robust national data on how AI is changing traveller behaviour. Its call for a unified AI Office of Ireland with a clear point of authority across Government directly addresses the fragmented governance landscape that tourism stakeholders have consistently identified as a barrier to coordinated sector-level action.

Five Key Policy Drivers That Will Shape AI and Irish Tourism

Drawing on the three policy documents and the research gathered in this report, five key drivers emerge that will define how AI shapes Irish tourism over the next five years. These are not abstract policy commitments. They are concrete forces that will determine whether the sector advances competitively or falls further behind its international peers.

Driver 1: The SME Digital Adoption Imperative

The single most important structural challenge identified across all three policy documents is the digital capability gap among Irish tourism SMEs. The National Tourism Policy Statement estimates that 90% of Ireland's 46,000 tourism enterprises are SMEs, and sets a target of 90% of tourism-related SMEs adopting advanced digital tools by 2031. The National Digital and AI Strategy reinforces this with a specific AI and Digital awareness campaign for SMEs and an AI Adoption Roadmap differentiated by sector. The AI Advisory Council, meanwhile, emphasises the need for practical supports, faster funding mechanisms, and a regulatory sandbox that actively assists non-software businesses in navigating compliance.

The survey data in this report underlines how far there is to go. Cost, skills, and capacity are consistently the top barriers to AI adoption. The challenge is not one of ambition but of execution: SMEs need accessible, practical, and funded pathways to AI tools, not aspirational targets set without the support infrastructure to achieve them. The gap between the 90% target and current adoption rates is one of the most significant policy challenges Irish tourism faces. How it is addressed in the coming years will be the defining test of the digital transition strategy.

Driver 2: AI-Driven Discovery and the Changing Shop Window

The National Tourism Policy Statement explicitly acknowledges that over 30% of overseas audiences have used generative AI for travel inspiration or itinerary building, citing Tourism Ireland research. This figure aligns with the data underpinning the survey conducted for this report. The implication is that the way Ireland is discovered, considered, and chosen as a destination is undergoing a structural shift. Conversational AI is beginning to displace traditional search as the primary tool through which travellers research destinations, and this shift has profound consequences for how Irish tourism presents itself digitally.

The policy commitment to AI-optimised platforms and continued investment in Ireland.com acknowledges this shift, but the transition from SEO-centric visibility to Generative Engine Optimisation (GEO) requires a systematic rethinking of how tourism content is structured, tagged, and made machine-readable. If Ireland's tourism businesses do not appear prominently in AI-generated recommendations, they will be effectively invisible to a growing share of potential visitors at the moment of inspiration. This driver creates an urgency that the current policy language acknowledges but has not yet fully translated into funded, sector-specific action.

Driver 3: Workforce Transformation and the Skills Imperative

All three policy documents grapple with the workforce implications of AI, and none of them resolve the central tension: AI will generate productivity gains, but it will also displace tasks, alter career pathways, and change the skills that employers need and that workers must develop. The National Digital and AI Strategy commits to an AI Skilling Platform, an updated

Technology Skills Roadmap, and a National Skills Observatory. The AI Advisory Council calls for a real-time AI Observatory to track labour market dynamics and warns that the pace of change may be unprecedented in Ireland's economic history.

For tourism, the stakes are particularly acute. As discussed in the “Francis Brennan Problem” section of this report, the sector's identity and quality rests on its people. AI taking over entry-level administrative tasks risks removing the career on-ramps that have historically produced Ireland's most celebrated hospitality professionals. National skills policy must engage directly with the tourism sector to develop training frameworks that do not simply upskill workers for generic AI tools, but that actively cultivate the irreplaceable interpersonal and experiential qualities that make Irish tourism distinctive. This is an area where the current policy framework offers broad commitments but lacks the tourism-specific granularity that the sector requires.

Driver 4: Data Governance, Sovereignty, and the National Data Infrastructure

The AI Advisory Council's recommendations on AI sovereignty and data infrastructure are directly relevant to tourism, even though they are framed in broader national terms. The Council calls on Government to identify and make available key public data resources, to safeguard national data assets, and to explore updates to the EU Open Data Directive to ensure that high-value public data can be preferentially shared with AI firms operating in Ireland or the EU. For tourism, this connects directly to the challenge of building the structured, machine-readable content ecosystems that AI discovery platforms require.

The National Digital and AI Strategy also commits to a new Public Service Data Strategy and to ensuring the digital readiness of new legislation, both of which have implications for how tourism data is collected, shared, and used. The expert interviews in this report repeatedly flagged the absence of a robust national tourism data infrastructure as a critical gap: without reliable, structured, and up-to-date destination data, Ireland's tourism businesses cannot be effectively represented in AI-driven discovery systems. National data policy therefore needs to treat tourism data as a strategic asset, not merely an administrative output. The shadow AI phenomenon, documented in this report, further underlines the data governance urgency: organisations are already feeding sensitive data into unmanaged consumer AI platforms, with no policy framework governing the practice.

Driver 5: Ethical AI, Trust, and Preserving the Irish welcome

Ireland's National AI Strategy has consistently emphasised trust, transparency, and people-centred AI as foundational principles. The National Digital and AI Strategy reaffirms this, committing to a human-centric approach to digital governance, to protecting fundamental rights, and to building the societal trust and literacy needed for a confident digital future. The AI Advisory Council reinforces this further by addressing deepfakes, digital cloning, copyright protections for creators, and the need for robust biometric safeguards. These are not abstract ethical concerns; they are directly relevant to tourism, where authenticity, trust, and human connection are core components of the product.

The survey conducted for this report found significant concern among industry stakeholders about whether AI risks eroding the personal warmth and authenticity that Irish tourism is known for. National policy's commitment to ethical, people-centred AI provides an important framework for how tourism organisations should approach AI deployment. The challenge is not whether to use AI, but where and how: ensuring that AI handles the transactional and administrative while preserving and amplifying the genuinely human interactions that no technology can replicate. The EU AI Act, being implemented through Ireland's AI Office, will also bring new compliance obligations for high-risk AI applications, and tourism organisations will need to understand what these mean for customer-facing deployments such as chatbots, personalisation engines, and dynamic pricing systems.

Policy Conclusions: Alignment, Gaps, and Opportunities

The national policy landscape is, on balance, well aligned with the needs identified by Irish tourism stakeholders in this research. The commitments to SME digital supports, to ethical AI governance, to national data infrastructure, and to skills development are all directly relevant to the sector's most pressing challenges. The inclusion of AI as a named priority in the National Tourism Policy Statement marks a significant step forward from previous strategy cycles.

There are, however, meaningful gaps. National policy frameworks are necessarily horizontal, applying across all sectors. Tourism's specific characteristics, its SME intensity, its dependence on authentic human experience, its particular vulnerability to AI-driven discovery shifts, and its regional economic importance, require sector-specific policy attention that the current landscape does not yet fully provide. The evidence from this report, from expert interviews, and from the industry survey is consistent: Irish tourism is behind the curve, the policy environment is broadly supportive, but execution and resourcing at the sectoral level remain the critical challenge. Ireland's policy ambition is right. The question now is whether it will be matched by the speed and specificity of implementation that the sector needs.

1. 1. Key Survey Findings: Industry Perspectives on AI & Irish Tourism

This chapter presents the key findings from the ITIC survey on Artificial Intelligence and Irish Tourism, drawing on responses from 73 organisations across accommodation, visitor attractions, tour operators, destination marketing organisations, local authorities, airlines, and activity providers. Respondents represent a broad cross-section of the Irish tourism ecosystem, from SMEs operating in rural regions to large national bodies, providing a rich and representative picture of the sector's current relationship with AI and its ambitions for the future.

The respondent profile is weighted towards the experience economy: 38% are visitor attractions and activities, 14% are destination marketing organisations or local authorities, and the remainder span accommodation, transport, tour operators and tourism support services. Geographically, 42% are Dublin-based, 25% operate nationally or multi-regionally, and 32% are based in regional tourism areas including the Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands. All percentages that follow are calculated on the full base of 73 respondents unless otherwise stated.

73 Organisations surveyed	62% Currently using AI in some form	98% See AI as essential or useful	96% support an AI and Tourism Strategy (Yes or Maybe)
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AI Adoption is Underway, but Remains Largely Experimental

The survey reveals that the majority of Irish tourism organisations have begun their AI journey, but adoption is fragmented and largely experimental. 62% of respondents (45 of 73) indicated that their organisation uses AI in day-to-day operations. When asked to describe their stage of adoption, the picture becomes clearer:

52% Early/experimental use	32% Moderate integration	5% Extensive integration	11% Not yet using AI
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The most striking feature of this data is the concentration at the experimental end. Over half of all respondents describe their AI use as early or experimental. Only four organisations, 5% of

the sample, have achieved extensive integration. The industry is engaged but not yet committed. It is dipping its toes in the water, not swimming yet.

This unevenness is particularly pronounced between organisation types. DMOs and marketing agencies show the highest adoption rate (70%), followed by support services and transport. Visitor attractions, despite being the largest respondent group in the survey (38% of all respondents), show the lowest adoption rate of any major category at 43%. This is a significant concern: the core experience providers of Irish tourism are falling behind the marketing and support organisations that surround them.

Geographically, adoption is more balanced than might be expected between Dublin (58%) and regional operators. The real leaders are the large nationwide organisations with centralised resources, where 83% report using AI. The gap is not primarily Dublin versus the regions. It is between organisations with the scale and resources to invest in digital capability and those without.

"Our company is in the early role of adapting AI into certain parts of our business; it is difficult to know where this will lead to both in terms of advantages and pitfalls." - Airline/Carrier respondent

"We are still on a learning path about AI - still a lot to discover." - Incoming Tour Operator respondent

The picture that emerges is of an industry in transition, aware of AI's potential but largely operating without strategic frameworks, dedicated AI leadership, or the resources to accelerate adoption in a structured way. Only 38% of respondents reported having an AI lead or someone with dedicated responsibility for AI within their organisation.

The Strategy Gap

There is a critical disconnect between belief and preparedness. When asked how significant AI will be for Irish tourism over the next three to five years, 66% of respondents described it as "essential to competitiveness" and a further 32% as "useful but not essential." Just 3% (two respondents) considered AI to be of limited relevance.

Yet when asked whether their organisation has developed a specific AI strategy, only 15% said yes. A further 30% have a strategy in development. Over half (55%) have no AI strategy at all. And only 23% have addressed AI within any other corporate or organisational strategy.

This is the Strategy Gap. The vast majority of the sector believes AI is essential to its future, but almost none has a plan for it. The gap between conviction and action is one of the most important findings in this survey.

The Content Trap: Using AI to Talk, Not to Listen

Among the 45 respondents who use AI in their day-to-day operations, the pattern of use reveals a striking imbalance. The sector is overwhelmingly focused on generative and content tasks. It is using AI to create more noise (content) rather than process signals (data).

78% Copywriting and content development	53% Marketing and campaign optimisation	42% Data analysis or modelling
38% Automating internal processes	22% Customer service or visitor engagement	20% Pricing or revenue optimisation

Generative AI platforms, particularly ChatGPT, and AI chatbots for customer service and booking support are by far the most commonly used tools. This reflects the accessibility of these tools: they require minimal technical infrastructure, are available via free or low-cost subscriptions, and can be adopted by individuals without specialist knowledge.

More sophisticated applications, such as dynamic pricing and revenue management systems, personalised recommendation engines, demand forecasting tools, and AI-driven itinerary builders, are in use among a smaller but notable segment of respondents, particularly in larger accommodation providers and tour operators.

The concentration of AI use in content and marketing tasks reflects both the maturity of consumer-facing AI tools and the mounting pressure on communications teams to produce more content at greater speed. However, the strategic and operational tools that could address the sector’s most acute challenges, labour shortages, yield management, visitor dispersal, remain significantly underutilised. This is the Content Trap: the industry is using AI to generate more marketing material while the operational opportunities that could transform productivity and competitiveness are being left on the table.

"Avoid the AI slop trap - we will lose our authenticity. It's happening already - marketers are at fault." - Genealogical Tourism operator

"It is a concern that we will do AI so badly or lacking in best practice framework which will reflect badly on the destination in general." - Tour Operator/DMC respondent

Skills, Capacity and Data Quality are the Primary Barriers

When asked about the main barriers preventing or limiting AI adoption, respondents were remarkably consistent. The top barriers are:

64% Skills and awareness	59% Time and internal capacity	41% Training availability
36% Data quality or access issues	32% Costs or budget constraints	25% Staff resistance or concern

The most significant finding here is what is not at the top of the list. Cost ranks fifth, behind skills, capacity, training and data quality. This challenges the assumption, common in industry surveys, that AI adoption is primarily a funding problem. The Irish tourism sector is not saying “we cannot afford AI.” It is saying “we do not know how to use it, we do not have time to learn, and our data is not ready.” The industry needs education, not just capital.

The prominence of data quality as a barrier (36%) is a sophisticated insight. Members understand that their internal data, unstructured customer information, siloed booking and marketing systems, inconsistent content, is not “AI-ready.” This finding supports the case for investing in data infrastructure as a prerequisite for effective AI adoption.

Even among those already using AI, confidence is low. Of the 45 AI users, only 5 (11%) feel they have the skills and capacity to use AI effectively. 71% say “partially” and 18% say “no.” Fewer than one in nine current AI users feels fully equipped to do what they are already doing. This is a sector that is experimenting, but doing so without confidence.

"The biggest challenge is GDPR and data protection as we rely on expensive external expertise for our IT services. We cannot adopt any level of AI officially due to the cost of these applications for a business account, and a lack of understanding on GDPR and data controls." - Visitor Attraction, Wild Atlantic Way

"A basic guide to using AI and where it can help your business would be a real starting point." - Visitor Attraction, Ireland's Ancient East

Irish Tourism is Seen as Behind the Curve

Respondents were asked to assess how well Irish tourism has responded to AI. The verdict is clear and sobering:

56% Say the picture is 'mixed'	38% No, has not adopted AI well	5% Yes, has adopted well
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Only 5% of respondents believe Irish tourism has adopted AI well. The majority view is “mixed,” and more than a third are categorical that the sector has not seized the opportunity. When asked separately whether Irish tourism has responded well to the shift in traveller research behaviour (the Tourism Ireland finding that up to 33% of travellers now use AI for trip planning), the picture is similarly cautious: 66% said “partially,” 26% said “no,” and only 8% said “yes.”

"No risk - the biggest risk is that we are already behind the curve and do not adapt at a fast enough pace and lose competitiveness and efficiency." - Visitor Attraction, Dublin

"The growing influence and impact of AI-powered global travel platforms and the risk that they become the primary interface for trip planning." - Inbound Tour Operator, Wild Atlantic Way

The concern about being outpaced by competitor destinations was a recurring theme. Several respondents pointed to the risk that international AI platforms will increasingly determine how Ireland is discovered, described, and booked by international visitors, leaving Irish operators without influence over how their own destination and products are presented.

Near-Universal Support for a Dedicated AI and Tourism Strategy

One of the most emphatic findings from the survey is the near-universal call for a dedicated national strategy on AI and tourism:

78% Support a dedicated AI & Tourism Strategy	18% Said 'maybe'	4% Said 'no'
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96% of respondents support or are open to a dedicated strategic response. Only three respondents said no. This is a sector-wide consensus that transcends organisation size, type, and geographic location.

"Ireland should aim to be a market leader in the use of AI to bring the key tourism areas to life for those considering visiting Ireland, and also have information available at the touch of a button." - Destination Marketing Organisation respondent

"A National Tourism AI policy to guide all stakeholders on the optimum use of AI and to assist in avoiding diminished guest experiences. Establishment of a National Centre for Technology Advances that would research and inform policy and delivery of AI technology throughout the industry." - Accommodation Provider, Wild Atlantic Way

This call for national strategic leadership reflects frustration with the current situation, where individual organisations are left to navigate AI adoption in isolation, without clear guidelines, benchmarks, or coordinated support.

Training and Practical Support are the Top Priorities

The most consistently requested forms of support were:

75% Training workshops or webinars	66% Practical case studies from other tourism businesses	60% Funding or grants
53% Clear national guidelines or best-practice frameworks	52% One-to-one advisory support	48% Peer learning or networking opportunities

The desire for practical, applied, Ireland-specific case studies is particularly telling. Many respondents expressed a wish not just to understand AI in the abstract, but to see how organisations similar to their own, in terms of size, sector, and regional context, have adopted AI successfully. This speaks to a learning culture that is grounded and pragmatic rather than aspirational.

Notably, funding and grants, while important (60%), rank third behind training and case studies. This reinforces the finding from the barriers data: the sector’s most urgent need is knowledge and capability, not capital alone. SMEs do not yet know what to buy with funding. They need to learn first.

"We need training that delivers adoption of AI, not just awareness." - Visitor Attraction respondent

"A skilled workforce with the capabilities to fully utilise AI - that is the primary outcome we need from any national AI prioritisation." - Local Authority/Tourism Agency respondent

The Céad Míle Fáilte Paradox: A Polarised Industry

The industry is almost exactly split on whether AI threatens the personal character of the Irish welcome:



This is not a majority concern or a minority anxiety. It is a genuinely polarised finding. The industry is divided almost exactly down the middle. Both sides hold their position with conviction.

Those who are worried point to specific and grounded risks: chatbots replacing the local knowledge of a front desk receptionist, AI-generated copy replacing the authentic voice of a family-run guesthouse, algorithmically optimised itineraries that bypass the spontaneous, unhurried conversations that visitors consistently cite as the highlight of their trip to Ireland.

Those who are not worried draw a constructive distinction. AI that handles the administrative, the reservation management, the review responses, the invoice processing, actively frees human staff to do more of the things AI cannot: to listen, to share stories, to make a guest feel welcome. In this framing, AI is not the enemy of the Irish welcome. Poorly resourced, over-stretched staff who have no time for genuine hospitality because they are buried in administrative work: that is the enemy.

"Handled well, AI can deepen authenticity. Handled badly, it can quietly erase it."
- Visitor Attraction respondent

"The dumbing-down of the Céad Míle Fáilte." - Visitor Attraction, Ireland's Hidden Heartlands

This tension, between AI as amplifier and AI as eraser of authenticity, is the defining challenge for Irish tourism's approach to AI. It is not a question that can be resolved by technology alone. It requires clear principles, shared standards, and the cultural confidence to say: AI belongs here, but not there. This is the High Tech, High Touch challenge that runs through this entire report.

The Risk Radar: What the Sector Fears Most

Respondents identified a wide range of risks associated with AI adoption. The top concerns are:

63% Bias or inaccurate AI outputs	62% Loss of authenticity or personal interaction	56% Over-reliance on technology	52% Data privacy and GDPR compliance
49% Impact on jobs and skills	23% Brain drain and reduced decision-making capacity	23% Environmental impact (water, energy, resources)	22% Ethical concerns (privacy, IP, copyright)

The top risk is not data privacy, as is often assumed. It is bias and inaccuracy: the fear that AI systems will produce incorrect information, misrepresent destinations, or make recommendations based on flawed data. This is closely followed by the loss of authenticity concern. Together, these two risks, quality and identity, dominate the sector's thinking.

Environmental impact, while cited by fewer respondents (23%), is a notable and growing concern, particularly among sustainability-focused organisations. As one respondent put it: "There is a massive sustainability issue behind AI also with the amount of energy and water consumed by its data centres."

"The plasticification of the tourism proposal." - Airline/Carrier respondent

"AI only destination – Ireland is rugged and real, AI presents everything as polished and that is not the mystical, Irish romantic offering." – Visitor Attraction respondent

AI and Visitor Dispersal: A Practical Opportunity

One of the most practically exciting use cases identified by respondents is the potential for AI to assist with visitor dispersal and the reduction of overtourism pressures. By enabling personalised, data-driven itinerary building that surfaces off-the-beaten-track experiences, regional attractions, and lesser-known destinations, AI could make a meaningful contribution to one of the most persistent structural challenges facing Irish tourism.

"Personalisation and aggregation of data to suggest bespoke itineraries. Potential for increased spread across regions. Increased exposure for all strategically

important experiences or events.” – Local Authority/Tourism Agency, Wild Atlantic Way

Several respondents pointed to the potential for AI to support multilingual visitor engagement, enabling Irish tourism businesses to communicate effectively with visitors from non-English-speaking markets. Voice-activated AI translation tools and multilingual chatbots were specifically cited as accessible near-term applications.

Data Quality and National Tourism Data Infrastructure are Critical Enablers

A cross-cutting theme throughout the survey responses is the inadequacy of data quality and infrastructure as a foundation for effective AI adoption. AI systems are only as good as the data on which they operate, and multiple respondents flagged that the Irish tourism sector’s data landscape is fragmented, inconsistent, and difficult to access in the structured formats that AI platforms require.

“One school of thought is that the internet is changing irreversibly - it’s about the data, not the website. We need to provide good quality genealogy, heritage, and history data to fit the new agent-based world.” - Genealogical Tourism operator

“Aggregation of all tourism attraction data and all development plan documents nationally - that is the real opportunity for AI in Irish tourism.” - Local Authority/Tourism Agency respondent

The development of a National Tourism Data Infrastructure was identified by multiple respondents as a priority outcome for any dedicated AI and Tourism Strategy. This would serve as the backbone for AI-driven itinerary building, personalised marketing, visitor dispersal tools, and the kind of joined-up analytics that could transform how the sector understands and responds to visitor behaviour.

Efficiency Gains are Real but Modest

Among the 45 respondents using AI, all reported some level of efficiency gain. 76% described savings as “somewhat,” while 24% reported “significant time or resource savings.” No respondents reported zero benefit from AI tools. This is encouraging: AI is delivering value wherever it is being used. But for three quarters of users, the gains remain incremental rather than transformative. This is consistent with an industry in the experimental phase. The evidence suggests that moving from ad hoc use to strategic integration would unlock substantially greater returns.

“For us, it can increase productivity and innovation. Efficiencies in reducing administrative tasks will free up staff to be more customer-facing and service delivery.” – Visitor Attraction, Dublin

“Essential technology that can make business processes more efficient and help promote products or services to the right market.” – Tourism Support Service respondent

Summary of Key Survey Findings

AI Adoption is Uneven	62% using AI; 52% at early/experimental stage; only 5% extensive
The Strategy Gap	66% see AI as essential; only 15% have a strategy
The Content Trap	78% of AI users focus on content; only 20% use pricing/yield tools
Skills and data, not cost, are the barriers	64% cite skills; 36% cite data quality; cost ranks fifth at 32%
Ireland is behind the curve	38% say No, 56% say Mixed; only 5% say adopted well
Strategy urgently needed	78% support a dedicated AI and Tourism Strategy
Training is the top priority	75% want workshops; 66% want case studies
Industry polarised on Irish welcome	49% worried, 51% not worried
Bias and accuracy are the top risks	63% cite inaccuracy; 62% cite loss of authenticity
Visitor dispersal is a key opportunity	AI-driven personalised itineraries for regional balance
Data infrastructure is critical	Fragmented data a key barrier; national data hub strongly desired
Efficiency gains are real but early-stage	100% of users see some gain; 76% describe them as modest

2. 2. What the Experts Said

As part of the development of this research we complemented the industry survey above with one to one interviews with national and international experts in the field of Artificial Intelligence and Tourism. The below is an anonymised summary of their key perspectives. The following findings draw on in-depth interviews conducted with a range of senior figures from across Irish tourism, digital marketing, technology and public policy. All contributors have been anonymised. Their insights have been grouped under six key themes that together reflect the state of AI adoption in Irish tourism, the opportunities it presents, and the challenges that must be addressed.

Ireland's Shop Window Has Already Changed

Experts were unanimous that the most immediate and disruptive impact of AI on Irish tourism is already happening. Not in back-office systems or future policy documents, but in how travellers discover Ireland in the first place. The traditional shop window of tourism, the website, the search result, the DMO listing, is being replaced by conversational AI tools that synthesise information and present curated answers rather than links. Several experts described a fundamental shift from SEO (Search Engine Optimisation) to what one termed GEO, or Generative Engine Optimisation, where the rules of visibility are being rewritten in real time.

The scale of this shift is no longer speculative. Tourism Ireland's own research confirms that one in three holidaymakers now uses AI to form holiday plans, rising to one in two among US travellers, Ireland's most valuable overseas market. The research describes AI chatbots as a way for travellers to begin the research process and reduce planning time, with most visitors then conducting their own manual research and booking as a follow-on. The implication for Irish tourism businesses is stark: if a destination, experience, or accommodation is not surfaced accurately at that initial AI-driven moment of inspiration, it may never enter the traveller's consideration at all.

The concern raised repeatedly by experts was that Irish tourism businesses, particularly smaller operators, may already be invisible in this new environment without realising it. If an AI travel tool does not surface a guesthouse, an activity provider, or a regional attraction, not because it does not exist but because its content is not structured in a way AI can read, the business effectively does not exist for a growing cohort of travellers.

DMO websites were identified as facing a particular challenge. Traditional marketing metrics, web traffic, click-through rates, time on page, are declining as visitors bypass websites entirely and go directly to AI-generated responses. Measuring success is getting harder precisely when the stakes are getting higher. Several experts argued that destination organisations need to

rethink their role: less as publishers of content for human readers, and more as custodians of trusted, structured data that feeds AI systems reliably and accurately. In the AI-driven discovery environment, content quality, accuracy, and machine-readability are no longer optional. They are the price of entry.

Back-End AI Is the Quiet Revolution

While much of the public conversation around AI in tourism focuses on chatbots and consumer-facing tools, experts pointed to a quieter but potentially more impactful revolution happening behind the scenes. AI tools are already being used, often informally and without organisational strategy, to handle time-consuming administrative tasks, assist with content creation, manage revenue and pricing, and streamline operations that have historically consumed disproportionate staff time in a labour-intensive sector.

Several experts noted that the return on investment from back-end AI adoption is often faster and more measurable than consumer-facing applications. Revenue management systems with AI-driven pricing, AI-assisted booking platforms, point-of-sale integrations, and fleet management tools were all identified as areas where early adopters are already gaining competitive advantage. The potential is significant in a sector where margins are tight and staffing costs are high.

Experts were candid that much of this adoption is happening informally. Individual staff members are using commercially available generative tools without organisational oversight, training, or policy. This presents both an opportunity and a risk. The opportunity is that adoption is already underway and enthusiasm exists. The risk is that without structure, the gains are inconsistent, the data is potentially insecure, and the organisation has no strategic framework to build on.

The consensus view was that Irish tourism businesses, particularly SMEs, need practical and accessible supports to move from informal use to confident, structured adoption. Freeing people from administrative burden in a sector that relies on human warmth and personal service is, paradoxically, one of the strongest arguments for embracing the technology. This is the High Tech, High Touch principle at work: let AI handle the back office so that people can focus on the front of house.

The SME Problem and the Risk of Being Left Behind

No theme recurred more consistently across expert conversations than concern for Ireland's tourism SMEs. The sector is built on small, often family-run businesses: guesthouses, activity providers, heritage sites, local restaurants. And it is precisely these businesses that are least equipped to navigate the AI transition and most exposed to its risks if they do not.

Experts described a compounding disadvantage. Smaller businesses typically lack dedicated digital or marketing staff, have limited budgets for technology investment, and are already

stretched managing day-to-day operations. Many are still at an early stage of basic digitalisation, let alone AI readiness. Several experts noted that small tourism websites are struggling particularly, caught between declining organic search traffic and an inability to meet the structured content standards that AI systems favour. The gap between the large platforms and the independent operator, already significant, risks widening further.

Policy-level experts pointed to international examples where targeted interventions have helped level this playing field, citing initiatives in Aarhus and other European destinations designed specifically to support small businesses in navigating AI adoption. The view from several quarters was that Ireland needs equivalent, practical, sector-specific support rather than generic national digital programmes that do not speak to the realities of running a small tourism business.

One expert framed the challenge memorably: the problem is not that SMEs are resistant to change. It is that they do not have the time, the language, or the on-ramp. What they need are trusted intermediaries, industry bodies, regional tourism organisations, or sector-specific programmes, who can translate AI's potential into practical steps that do not require a technology background to follow.

The Francis Brennan Problem: AI, Skills and the Human Touch

The key question for Irish tourism when it comes to skills is does the industry still produce long serving experts such as Francis Brennan in a world with AI? Several experts raised a concern that sits at the intersection of workforce development, sector identity, and long-term competitiveness. Irish tourism's most celebrated quality is its people: warm, characterful, knowledgeable hosts and frontline staff who turn a transaction into a memory. That quality is not born overnight. It is the product of years of experience, mentorship, and gradual development, often starting with minor tasks that give young workers a foothold in the industry.

If AI takes over those minor tasks, the admin, the bookings management, the content writing, the social media scheduling, the entry points disappear. Young people entering the industry will not accumulate the experience base that produces the next generation of exceptional hosts, guides, and managers. The sector risks producing technically competent operators who have never had to learn the trade from the ground up.

This concern was balanced, however, by a recognition that the alternative, protecting minor tasks from automation in order to preserve career pathways, is neither realistic nor desirable. The more constructive framing offered by experts was around deliberate workforce strategy: ensuring that as AI absorbs transactional tasks, the industry invests in the interpersonal, creative, and experiential skills that AI cannot replicate. Ireland's competitive advantage in tourism has never been its infrastructure. It is its people. That advantage needs to be actively cultivated, not assumed.

Ireland: A Cautious Approach to AI Adoption

A thread of candid self-assessment ran through the expert conversations: Irish tourism has not yet responded adequately to the AI transition, and the window for getting ahead of it is narrowing. Several experts were direct in saying that the sector has been slow to recognise the scale of the shift underway, not through lack of ambition, but through a combination of capacity constraints, fragmented leadership, and an understandable tendency to focus on immediate operational pressures rather than medium-term structural change.

Experts pointed to specific indicators of this lag. The decline in social media and travel agency intermediaries, one expert cited a 24% reduction in social media agencies operating in Ireland in a single year, reflects how rapidly the distribution landscape is changing. The absence of robust Irish data on how travellers are actually using AI for trip planning was itself identified as a problem. Experts argued that Ireland urgently needs better research into AI-driven travel behaviour in order to respond intelligently rather than reactively.

International comparators were referenced approvingly. Singapore's smart tourism infrastructure, Nordic destination data platforms, and Canada's big data modelling were all cited as evidence that coordinated national approaches can deliver meaningful advantage. The consistent message was that Ireland does not need to invent a new model. It needs to learn from what is working elsewhere and apply it with the specificity that Irish tourism's SME-heavy, experience-led character demands.

The mood among experts was not defeatist. Ireland retains real assets: authentic experiences, a trusted national brand, strong community-level tourism. These are precisely what AI-fatigued travellers will increasingly seek out. The risk is not that Ireland loses that advantage permanently. It is that the country sleepwalks through the transition and finds itself structurally disadvantaged in the platforms and systems that will shape how the world discovers travel destinations for the next decade.

The Shadow AI Agent: The Invisible Adoption

One of the most candid threads in expert conversations concerned something that rarely appears in official strategy documents: the widespread, informal, and largely invisible use of AI tools by tourism and public sector staff who are operating entirely outside their organisation's knowledge or governance. Experts described this phenomenon, known internationally as shadow AI, not as a fringe behaviour but as the norm across the sector.

The global picture is sobering. An MIT study on generative AI in the workplace found that workers at more than 90% of companies are using personal chatbot accounts for daily tasks, often without IT approval, while only 40% of companies actually have official AI subscriptions in place. A separate survey found that nearly half of all workers admit to adopting AI tools without employer approval, with more than half of those relying on free versions into which they are freely inputting sensitive organisational data. Crucially, this behaviour is not confined to junior staff: research suggests that 69% of presidents and C-suite members and 66% of directors and senior vice-presidents are comfortable with this approach, prioritising speed over security.

For Irish tourism and the wider public sector we do not know how prevalent this is, but the implications are significant. Free-tier LLM accounts, the most commonly used, do not carry the data protections of enterprise versions. Research indicates that many ChatGPT accounts in workplace settings are non-corporate ones that lack security and privacy controls, with the increasing for other major AI platforms. Free tools typically use the data entered into them to train their models.

Experts who raised this issue in the Irish context were not alarmist. The productivity gains are real, the enthusiasm is genuine, and in a sector where resources are stretched, it is entirely understandable that individuals reach for tools that help them do their jobs better. The concern is not that people are using AI. It is that organisations are accruing real risk without knowing it. Tourism boards, local authorities, and state agencies involved in destination management may have staff routinely inputting visitor data, content strategies, funding information, or commercial partner details into unmanaged consumer AI platforms. No policy framework governs it. No one is tracking it.

The experts' view was consistent: shadow AI is not a problem to be solved by banning tools. Bans simply drive the behaviour further underground. Research shows that 85% of employees who already have approved AI tools still admitted to using unapproved ones alongside them. The solution lies in acknowledging the reality openly, putting basic governance in place, and providing sanctioned alternatives that actually meet staff needs.

Note: All interviews were conducted on a confidential basis. Contributors are not identified individually. Findings represent a synthesis of views expressed across all interviews and do not necessarily reflect the position of any single organisation or person.

3. 3. Best Practices and Benchmarks

Scotland: A National AI Strategy for a Small Tourism Nation

Background

In early 2026, the Scottish Government published a five-year national AI strategy covering the period 2026 to 2031. Developed in partnership with industry, academia and the public sector, the strategy sets out how Scotland intends to harness AI for responsible and inclusive economic growth. While economy-wide, it contains elements directly relevant to tourism, particularly around SME adoption, digital skills, and authentic visitor experiences.

Approach

Scotland's strategy is built around an "AI Stack," a layered framework that addresses users, skills, business adoption, infrastructure, data, and regulation as interconnected challenges. Delivery is coordinated through AI Scotland, a body that brings together government, The Data Lab, ScotlandIS and enterprise agencies under a single programme. A key early action is an

expanded SME AI Adoption Programme, backed by nearly GBP 1 million in public funding, providing practical, hands-on guidance to smaller businesses.

Tourism relevance

The strategy explicitly acknowledges the risk that AI, if poorly implemented, could undermine the authentic and personal character of the Scottish visitor experience. It frames responsible adoption as a means of protecting, rather than replacing, human-centred hospitality. The SME Adoption Programme is a direct response to the challenge facing small tourism businesses. Investment in digital skills and AI literacy is treated as a prerequisite for meaningful adoption. Scotland's strategy commits to regular progress reporting and iterative refinement, acknowledging that the pace of AI development requires an adaptive policy approach.

Key takeaway for Ireland

Scotland demonstrates that effective AI adoption in a small nation with a strong tourism identity requires coordinated national leadership, dedicated SME support, and a clear commitment to responsible implementation. The creation of a single delivery body with cross-sector reach is central to the Scottish model. Ireland's tourism sector, similarly characterised by a dispersed SME base and a brand built on personal welcome, would benefit from a comparable approach.

Singapore: Smart Tourism at National Scale

Background. Singapore has positioned itself as a global leader in smart tourism through its Smart Nation initiative, a whole-of-government programme that integrates digital infrastructure, data analytics and AI across all sectors of the economy, including tourism. The Singapore Tourism Board (STB) has been an early and active adopter of AI-driven destination management.

Approach. Singapore's Tourism Information and Services Hub (TIH) provides a centralised, open-access digital platform through which tourism businesses can access visitor data, content tools, and integrated marketing services. The platform aggregates content from across the tourism ecosystem into structured, machine-readable formats that feed AI-driven travel planning tools. STB has also invested in AI-powered visitor analytics, using mobile data and sensor networks to understand visitor flow patterns in real time, enabling dynamic management of crowding and capacity at key attractions.

Tourism relevance. Singapore's approach is notable for the scale and coherence of its national data infrastructure. Rather than leaving individual businesses to structure their own content for AI discoverability, the government provides a centralised platform that aggregates, standardises and distributes tourism data. This is precisely the model that multiple ITIC survey respondents and expert interviewees identified as a priority for Ireland: a National Tourism Data Infrastructure that ensures all operators, regardless of size or digital capability, are represented in AI-driven discovery systems.

Key takeaway for Ireland. Singapore demonstrates the value of a centralised, government-backed tourism data platform as the foundation for AI-driven visitor management and marketing. Ireland's dispersed, SME-heavy tourism sector would benefit significantly from an equivalent national infrastructure.

Japan: Balancing Technology with Tradition

Background. Japan is widely regarded as a destination that has successfully integrated advanced technology into its tourism offering while preserving deep cultural tradition and personal hospitality. The country's approach to AI in tourism reflects a broader cultural philosophy: technology should serve the human experience, not replace it.

Approach. Japan has invested in AI-powered multilingual visitor services, including real-time translation at transport hubs, tourist information centres and cultural sites. AI-driven crowd management systems are used at major attractions and during peak events to maintain visitor comfort and safety. Importantly, Japan's approach preserves the role of the human host: technology handles the logistical and linguistic barriers, while the interpersonal experience remains firmly human-delivered.

Tourism relevance. Japan's model is directly relevant to the "High Tech, High Touch" challenge that Irish tourism faces. Japan demonstrates that a destination can be at the forefront of AI-powered visitor services while maintaining, and even strengthening, the personal character of its hospitality. The principle is consistent: AI manages the transactional and removes friction so that human interaction can focus on warmth, knowledge and connection.

Key takeaway for Ireland. Japan shows that advanced AI adoption and authentic cultural hospitality are not in tension. For Ireland, where the personal welcome is the primary competitive differentiator, Japan's approach provides a model for how AI can amplify rather than diminish the human experience.

Faroe Islands: Digital Tools for Sustainable Visitor Management

Background. The Faroe Islands, a small North Atlantic archipelago with a population of approximately 54,000 and a rapidly growing tourism sector, have adopted a distinctive approach to using digital and AI-adjacent tools for sustainable visitor management. The destination's challenge, managing increasing visitor demand while protecting fragile natural environments, is directly relevant to Ireland's own sustainability and dispersal ambitions.

Approach. The Faroe Islands' "Closed for Maintenance, Open for Voluntourism" initiative used digital platforms to manage visitor access to sensitive sites, inviting tourists to participate in conservation activities as a condition of access during maintenance periods. The destination's booking and visitor management systems use data-driven capacity controls to limit visitor numbers at vulnerable locations, ensuring that tourism growth does not outstrip environmental

carrying capacity. Digital tools are also used to redirect visitors towards less-pressured sites, supporting dispersal objectives.

Tourism relevance. For Ireland, where the National Tourism Policy Statement commits to a 45% reduction in tourism-related emissions by 2030 and where dispersal beyond Dublin and established gateway destinations is a strategic priority, the Faroe Islands model demonstrates how digital and AI tools can be harnessed in service of sustainability and regional balance. AI-driven visitor flow management, predictive capacity modelling, and personalised itinerary building that surfaces lesser-known destinations are all applications with direct transferability to the Irish context.

Key takeaway for Ireland. The Faroe Islands show that even small destinations with limited resources can use digital and AI tools to manage visitor impact and protect environmental assets. Ireland's Wild Atlantic Way, Ireland's Hidden Heartlands and Ireland's Ancient East all face comparable challenges and would benefit from similar approaches.

Bruges: Privacy-First Crowd Management in a Heritage City

Background. Bruges faces a challenge familiar to Ireland's most visited heritage sites. As a UNESCO World Heritage city attracting millions of visitors annually, it must balance tourism revenue with the preservation of its historic character and the quality of life of its residents. Overcrowding at peak times degrades the visitor experience, strains local infrastructure, and threatens the authenticity that draws people in the first place.

Approach. The City of Bruges partnered with Belgian startup CrowdScan to deploy a network of wireless sensors across its busiest streets and squares, including the Markt, Simon Stevinplein, and the main shopping thoroughfare from Zuidzandstraat to Steenstraat. The technology measures crowd density in real time by analysing the attenuation of low-energy radio signals between sensors. It does not rely on cameras, Wi-Fi tracking, Bluetooth, or any connection to personal devices. It is privacy by design, fully GDPR compliant, and requires no data processing of individual visitors. The system was selected following a competitive pilot (the VLOED project) in which multiple measurement technologies were tested side by side. Sensors are battery-powered with a three-year lifespan, requiring only a single powered gateway unit. In a UNESCO-protected environment where visual and physical impact must be minimised, this was a decisive advantage.

Tourism relevance. The data feeds directly into decision-making across multiple city departments. Tourism, Economy, and Mobility teams all draw on the same real-time and historical crowd intelligence to inform policy, resource allocation, and visitor communications. The next phase includes a public-facing dashboard enabling visitors to check crowd levels before choosing where to go, effectively encouraging self-dispersal. For Ireland, where visitor management at popular heritage sites and congested tourism corridors is a growing concern, the Bruges model demonstrates that meaningful smart tourism infrastructure can be deployed without compromising visitor privacy. This directly addresses the GDPR and data protection concerns that emerged as the top risk in the ITIC member survey. The technology is low-cost,

non-intrusive, and operates at city scale, making it relevant not just to major urban centres but to heritage towns and popular rural sites along routes such as the Wild Atlantic Way.

Key takeaway for Ireland. Bruges shows that crowd management and visitor dispersal do not require surveillance or intrusive data collection. Privacy-first sensor technology can provide the real-time intelligence that tourism operators, local authorities, and national bodies need to manage visitor flows, protect sensitive sites, and improve the visitor experience. The cross-departmental data-sharing model also illustrates the kind of joined-up tourism data infrastructure that this report recommends Ireland develop at national level.

Source: Bable Smart Cities Use Case Library (bable-smartcities.eu); CrowdScan (crowdscan.be)

4. AI in Ireland: Common Applications and Use Cases

This chapter examines the practical applications of AI currently in use or emerging across the Irish tourism sector. For each area, the discussion is grounded in the survey data, expert insights and international benchmarks that inform this report, and framed within the central argument that AI must serve the human experience, not substitute for it.

Marketing and Sales

AI is transforming how Irish tourism businesses attract, engage and convert visitors at every stage of the marketing funnel. The shift from traditional keyword-based search to conversational AI is fundamentally altering how destinations and businesses are discovered, creating both an urgent challenge and a significant opportunity.

Generative AI tools have already become mainstream in tourism marketing departments, large and small. The ITIC survey confirms that copywriting and content development is the most common use of AI among Irish tourism organisations (78% of AI users), followed by marketing and campaign optimisation (53%). Tourism Ireland has identified AI-optimised platforms as a strategic priority, recognising that Ireland's visibility in AI-generated travel recommendations requires the same disciplined investment that SEO demanded a decade ago.

Key AI marketing applications in Irish tourism currently include: generative content creation using tools such as ChatGPT and Microsoft Copilot for drafting marketing copy, translating content for international markets and responding to online reviews at scale; Generative Engine Optimisation (GEO) to structure destination content for discoverability in AI-powered travel planning tools; AI-driven campaign optimisation using machine learning to analyse performance in real time and adjust targeting and spend; personalised email and digital marketing that tailors messaging based on visitor preferences and behaviour; sentiment analysis and brand monitoring that processes visitor reviews and social media at scale; and visual AI tools that tag, organise and recommend imagery from digital asset libraries.

The risk the sector must guard against is the “AI slop” trap: the mass production of generic, undifferentiated content that erodes Ireland’s distinctive voice and brand equity. Ireland’s competitive advantage is built on authenticity, storytelling and a sense of place that AI can support but must never replace. The most effective approach integrates AI tools as accelerators for human creativity, not substitutes for it.

Sustainability and Destination Stewardship

Ireland’s tourism brand is built on the promise of a clean, green island with exceptional natural landscapes. Maintaining that brand in the age of AI requires both embracing the technology’s potential to support sustainability and confronting the uncomfortable reality of AI’s own environmental footprint.

The National Tourism Policy Statement sets ambitious sustainability targets, including a 45% reduction in tourism-related emissions by 2030. AI has a meaningful role to play in achieving these goals. Applications with the strongest sustainability potential include: visitor flow management and dispersal using predictive analytics to redistribute visitors away from over-pressured locations; carbon footprint modelling for visitor journeys and accommodation; resource optimisation using AI-driven energy management in accommodation; biodiversity and habitat monitoring using computer vision; and sustainable transport planning using multi-modal journey modelling.

Ireland must also be candid about AI’s environmental cost. Ireland hosts one of the highest concentrations of global data centre capacity in the world. According to the Central Statistics Office (CSO), data centres accounted for 23% of Ireland’s metered electricity consumption in 2025. Tourism organisations advocating for AI adoption must do so alongside transparent engagement with the sector’s net environmental impact.

Data and Insights

Data is the foundation on which effective AI is built, and Irish tourism’s data landscape presents both a critical challenge and a transformational opportunity. The ITIC survey identified data quality as a barrier to AI adoption for 36% of respondents, ranking it ahead of cost. The sector currently operates with a fragmented, inconsistent data infrastructure that limits the quality of AI outputs and reduces Ireland’s visibility in AI-driven discovery systems. Addressing this is arguably the single highest-leverage investment the sector could make.

AI-powered data and insight tools in use across the sector include: destination intelligence platforms that aggregate data from multiple sources to produce real-time visitor behaviour dashboards; predictive demand forecasting using historical and external data; AI-driven visitor research using NLP to analyse reviews and social media; structured data and schema markup that enables AI platforms to read tourism content accurately; and real-time pricing analytics for revenue optimisation.

The development of a National Tourism Data Infrastructure, a trusted, structured and openly accessible repository of destination, product and experience data, is identified by survey respondents and expert contributors as one of the most important investments the sector could make.

Operational Efficiency and Cost Saving

In a sector characterised by tight margins, labour intensity and high seasonality, operational efficiency is a persistent strategic priority. AI's most immediate and measurable impact in Irish tourism is being felt not in headline-grabbing consumer applications but in the quiet revolution happening in back-office systems, staffing tools and property management platforms.

The ITIC survey found that 100% of AI users reported some level of efficiency gain, with 24% describing savings as significant. The return on investment from operational AI adoption is often faster and more demonstrable than consumer-facing applications, making it a practical first step for businesses at any stage of the digital journey. Key operational applications include: revenue management and dynamic pricing; AI-assisted booking platforms and property management; automated customer communications outside business hours; review management at scale; workforce scheduling based on predicted demand; and procurement and supply chain optimisation.

The practical barrier for most Irish tourism SMEs is not awareness of these tools but access to the skills, time and capital needed to adopt them. Targeted support programmes, modelled on Scotland's publicly funded SME AI Adoption Programme, could unlock significant efficiency gains across Ireland's dispersed SME base.

Customer Experience

Customer experience is both the greatest opportunity and the most sensitive territory for AI in Irish tourism. Done well, AI-enhanced customer experience removes friction, anticipates needs and creates space for the human interactions that define the Irish welcome. Done badly, it replaces warmth with automation.

The sector's approach to AI in customer experience must be guided by a clear principle: AI handles the transactional so that people can deliver the exceptional. Key customer-facing AI applications include: chatbots and virtual assistants available around the clock in multiple languages; multilingual visitor engagement using real-time translation; personalised itinerary building that supports visitor dispersal; accessibility enhancement through automatic image descriptions and real-time captioning; and in-destination AI companions that provide contextual storytelling and navigation.

The ITIC survey found the industry almost evenly split (49%/51%) on whether AI will impact the Irish welcome. The answer is not to avoid AI in customer experience, but to deploy it with

intention, ensuring that technology manages the routine while human staff are freed, resourced and empowered to deliver the moments of genuine connection that no technology can replicate.

Case Study: The OpenAI SME AI Accelerator in Dublin

In March 2026, OpenAI delivered the first Irish edition of its SME AI Accelerator in Dublin, a hands-on, full-day workshop designed to help small business owners adopt AI tools for practical, everyday business tasks. The Dublin event was part of a broader European programme, developed in partnership with Booking.com and supported by the Irish Department of Enterprise, Tourism and Employment, targeting 20,000 SMEs across six countries: France, Germany, Italy, Poland, Ireland and the United Kingdom.

The programme is directly connected to the “OpenAI for Ireland” initiative announced in late 2025, under which OpenAI and the Department committed to an SME Booster programme providing hands-on AI skills training for SMEs nationally. Minister of State Niamh Smyth, with responsibility for AI and Digital Transformation, opened the Dublin session.

The Accelerator’s format is notable for its practicality. Participants were guided through structured workflows using ChatGPT, moving from basic prompting techniques to building reusable AI solutions for their own businesses: marketing campaigns, customer review analysis, operational checklists, and staff onboarding materials. The programme’s stated goal for each participant was to leave with at least one reusable AI workflow they could run again the following week. No technical background was required.

The Dublin Accelerator is significant for Irish tourism for two reasons. First, it demonstrates that the type of practical, hands-on, sector-relevant AI training that ITIC survey respondents identified as their top priority (75%) is now being delivered in Ireland, with Government backing, at no cost to participants. Second, the involvement of Booking.com as a delivery partner signals that global travel platforms are actively investing in SME AI capability, recognising that their own ecosystems depend on a digitally capable supply base. For Irish tourism SMEs, programmes of this kind represent exactly the accessible, practical on-ramp that the expert interviews in this report identified as essential. The challenge now is to ensure that tourism-specific versions of this model reach operators across all regions, not only those with the proximity and resources to attend a Dublin event.

5. Future Outlook: Trends in AI and Tourism

The pace of AI development means that any forecast carries significant uncertainty. What is clear from the research, expert interviews and survey data underpinning this report is that the changes already underway are structural, not cyclical. The following trends are expected to define the relationship between AI and Irish tourism over the next five years.

1. Agentic AI and the End of the Search Bar

The most significant near-term shift is the transition from AI tools that assist human decision-making to agentic AI systems that act autonomously on a user's behalf. Today's traveller uses ChatGPT to research destinations. Tomorrow's will instruct an AI agent to plan, book and manage an entire trip without visiting a single business website. For Irish tourism, the implication is stark: businesses that are not "agent ready," with structured, machine-readable content and frictionless digital booking, risk being bypassed entirely. The window to prepare is open, but it is narrowing.

2. The Consolidation of AI Travel Platforms

A small number of global AI travel platforms are emerging as dominant intermediaries between travellers and destinations. As these platforms consolidate, they will increasingly determine which destinations receive visibility at the moment of inspiration. This mirrors the dynamic that made Google, TripAdvisor and Booking.com so powerful in the previous decade, and it carries the same risk for smaller Irish operators. National coordination, led by Tourism Ireland and Fáilte Ireland, will be essential.

3. Hyper-Personalisation at Scale

AI is enabling a degree of personalisation in travel that was previously only achievable by the highest-end luxury operators. Visitors will increasingly expect experiences tailored to their individual preferences, accessibility needs, language and interests. For Irish tourism, this creates a genuine opportunity: the sector's depth of authentic, diverse and distinctive experiences is well-suited to personalised discovery. The challenge is having the data infrastructure and digital content to deliver on the promise.

4. Voice and Multimodal AI

The dominance of text-based digital marketing is giving way to voice, image and video as AI tools become multimodal. Visitors will increasingly use voice-activated AI to research and book travel, search using images rather than keywords, and consume AI-generated video content as a primary source of destination inspiration. Investment in high-quality photography, video and structured audio content is becoming a strategic necessity.

5. AI and the Regenerative Tourism Agenda

AI is emerging as a key enabler of regenerative tourism: an approach that seeks not just to minimise harm but to actively improve destinations for both visitors and host communities. AI-powered visitor management, real-time capacity monitoring, carbon footprint tools and biodiversity tracking all have roles to play. For Ireland, where the natural environment is a primary competitive asset and the National Tourism Policy requires a 45% reduction in tourism-related emissions by 2030, the integration of AI into sustainability management is a strategic imperative.

6. The Trust Economy and Responsible AI

As AI becomes more pervasive in the visitor journey, trust will emerge as a critical differentiating factor. Visitors will increasingly distinguish between destinations that use AI responsibly, transparently, ethically, and in ways that enhance rather than exploit the human experience, and those that do not. Ireland's national commitment to people-centred, ethical AI provides an important foundation. The sector's challenge is to translate that commitment into authentic practice at the level of every tourism business, destination and experience. High Tech, High Touch is not just an aspiration. It is Ireland's route to competitive advantage in the age of AI.

6. Challenges and Risks

AI Travel Information: The Race to the Bottom

Is there a relationship between how hard information is to obtain and its intrinsic value? Information about travel used to be difficult to obtain: word of mouth, trusted friends, a well-worn guidebook. It was scarce, and precisely because of that scarcity, it carried weight. When your neighbour recommended a guesthouse on the Dingle Peninsula, the recommendation meant something because it was theirs, tested and offered with conviction.

AI is not the first technology to flood the market with travel information. The internet created an initial deluge, and in response an entire industry of digital curation, SEO, influencer marketing, travel blogging, emerged to help travellers navigate it. AI represents the next wave, and it brings a fundamental risk for a destination like Ireland, whose tourism product depends on distinctiveness, nuance and authenticity: the risk of homogenisation.

When an AI travel tool constructs an itinerary for Ireland, it draws on the data it has been trained on. If that data overwhelmingly reflects the most-visited, most-written-about aspects of Irish tourism, the Cliffs of Moher, Temple Bar, the Ring of Kerry, then AI-generated Ireland will be a flattened, algorithmically optimised version of the country, stripped of the unexpected detours and off-the-beaten-track discoveries that make Irish tourism exceptional. In content creation, the risk is "AI slop." For Irish destinations, the risk is AI muck: mass-produced, algorithmically plausible but authentically hollow descriptions of a country that deserves far better.

The solution is not to resist AI, but to feed it well. Ireland's tourism sector must invest urgently in the quality, accuracy and depth of the structured data it makes available to AI systems. Rich, locally-sourced content about Ireland's lesser-known destinations, authentic experiences, heritage narratives and community stories must be placed where AI platforms can find and use it.

The Céad Míle Fáilte Question

Céad Míle Fáilte, a hundred thousand welcomes, is more than a phrase. It is the promise on which Irish tourism's international reputation has been built for generations. The question this

report confronts is whether AI, as it is adopted across the sector, is eroding that promise or whether, deployed thoughtfully, it might actually deepen it.

The ITIC survey found the industry almost exactly split: 49% worried that AI will negatively impact the Irish welcome, 51% not worried. This is not a fringe concern or a technophobic reaction. It reflects a genuine and sophisticated understanding of what makes Irish tourism distinctive, and a real anxiety about what could be lost if AI is implemented carelessly.

The concern is specific and grounded. Chatbots that replace the local knowledge of a front desk receptionist. AI-generated copy that replaces the authentic voice of a family-run guesthouse. Algorithmically optimised itineraries that route visitors efficiently between the top ten attractions without ever allowing for the spontaneous, unhurried conversations in a pub or market that visitors consistently cite as the highlight of their trip to Ireland. These are not hypothetical risks. They are already happening in destinations that have moved fast and thought little.

But the survey also captured a more hopeful perspective, and it is worth amplifying. AI that handles the administrative, the reservation management, the review responses, the invoice processing, actively frees human staff to do more of the things AI cannot: to listen, to share stories, to make a guest feel that they are not a booking reference but a welcome visitor. In this framing, AI is not the enemy of the Irish welcome. Poorly resourced, over-stretched staff who have no time for genuine hospitality because they are buried in administrative work: that is the enemy.

The challenge for the sector is to make this distinction in practice, not just in principle. That requires clear guidance, shared standards and the cultural confidence to say: AI belongs here, but not there. The Irish welcome has survived every previous wave of tourism technology. With the right approach, it can not only survive AI. It can be strengthened by it.

Case Study: The Doorman Fallacy and the Risk of Misdefining Value

Background

In his 2019 book *Alchemy: The Dark Art and Curious Science of Creating Magic in Brands, Business, and Life*, behavioural economist and Ogilvy Vice Chairman Rory Sutherland introduced a concept he called the Doorman Fallacy. The idea is deceptively simple, and it has direct implications for how Irish tourism approaches the adoption of AI.

The Concept

Imagine a five-star hotel whose management hires a consultancy to identify efficiency savings. The consultants identify the doorman as an obvious target. He costs €40,000 a year. His function, they conclude, is to open the door. An automatic door-opening mechanism can do that at a fraction of the cost. The recommendation is accepted. The doorman is gone. The savings are booked.

Two years later, the hotel is in serious difficulty. Occupancy has fallen. Reviews have changed in tone. The automatic door opens perfectly every time. But it does not hail a taxi, remember a returning guest's name, quietly redirect an unwanted visitor, or stand as a signal to the street that this is a place of genuine quality and care. It does not make a tired traveller feel, before they have crossed the threshold, that they are expected and welcome.

"The problem arises because opening the door is only the notional role of a doorman; his other, less definable sources of value lie in a multiplicity of other functions: taxi-hailing, security, vagrant discouragement, customer recognition, as well as in signalling the status of the hotel. The doorman may actually increase what you can charge for a night's stay. When every function of a business is looked at from the same narrow economic standpoint, the same game is applied endlessly."

Rory Sutherland, Alchemy (2019), p.126

Relevance for Irish Tourism

The Doorman Fallacy maps directly onto one of the central risks this report has identified. The temptation, facing labour shortages, tight margins and rising operational costs, is to look at a hotel receptionist, a heritage interpreter or a local tour guide and define their role by its most visible and measurable function: processing a booking, answering a question, describing a site. Having done so, replacing or substantially reducing those roles with AI becomes entirely rational. The saving is real. But what is destroyed may not show up in any report for two years - until occupancy shifts, reviews change tone, and repeat visitors quietly stop returning.

The receptionist is not primarily in the business of processing bookings. She is in the business of making a visitor from Boston or Berlin feel, for the first time, that they have arrived somewhere that was expecting them. The heritage guide is not primarily conveying historical information - that information exists on every website and in every AI chatbot. He is making history feel alive, surprising and personally relevant. These are not incidental to the Irish tourism product. They are the product.

Key Takeaway for Irish Tourism

Sutherland's insight is not anti-technology. It is a call to ask harder questions before automating. The question for Irish tourism is not 'can this task be automated?' - almost any task can. The question is: 'what is this role actually doing, beneath its surface function, and what happens to that deeper value if we hand it to a machine?' Where the honest answer is human connection, local knowledge, or the signal that this place genuinely cares, AI belongs in the back office, not at the front door. High Tech, High Touch is, at its core, the antidote to the Doorman Fallacy.

Source: *Sutherland, R. (2019). Alchemy: The Dark Art and Curious Science of Creating Magic in Brands, Business, and Life.* WH Allen. Doorman Fallacy discussed p.126.

The Land of Myth, Legend and Data Centres

How does Ireland's green image sit alongside the environmental reality of the AI revolution? This is one of the most uncomfortable questions Irish tourism must confront, and it deserves an honest answer rather than a convenient one.

Ireland is home to one of the highest concentrations of global data centre capacity in the world. According to the Central Statistics Office (CSO), data centres accounted for 23% of Ireland's metered electricity consumption in 2025, a figure projected to grow substantially as AI workloads increase. The irony is acute: the green island that markets itself to the world as a natural, sustainable destination is simultaneously one of the world's most important nodes in the carbon-intensive infrastructure that powers AI.

For Irish tourism, this tension is not merely reputational. The National Tourism Policy Statement commits the sector to a 45% reduction in tourism-related emissions by 2030, and sustainability is increasingly a decision-making factor for high-value international visitors, particularly in key markets such as Germany, the Netherlands and Scandinavia. If Ireland's AI adoption is perceived as environmentally contradictory, it creates a genuine vulnerability.

The responsible path forward requires Irish tourism to engage with this tension directly rather than ignore it. That means advocating for renewable-powered AI infrastructure, promoting energy-efficient AI tools across the sector, incorporating AI's environmental footprint into destination sustainability reporting, and ensuring that the sector's enthusiasm for AI does not come at the cost of the environmental authenticity that underpins its brand.

Arrested Development: Interrupting Key Hospitality Skills

Tourism and hospitality is a hereditary long-service industry in which many leadership careers are built over decades. The figures most celebrated in Irish hospitality, the general managers, the head guides, the celebrated hosts, almost without exception began at the bottom: answering phones, carrying bags, taking bookings, learning the trade through years of gradual, experiential accumulation. This is not incidental to what they became. It is how they became it.

If AI takes over those entry-level administrative tasks, and many of the tasks it is most capable of handling are precisely the ones that have historically provided the first foothold in the industry, the career pathways that have produced Irish hospitality's most distinctive talent risk disappearing. This is what the research in this report calls the Francis Brennan Problem: a shorthand for a specific and irreplaceable type of Irish hospitality professional whose extraordinary warmth, knowledge and character is the product of a lifetime in the industry. You cannot fast-track that formation. You cannot automate it. And you cannot replace it once it is gone.

The response to this risk is not to protect entry-level tasks from automation for their own sake. The response is a deliberate and sector-specific workforce strategy that ensures, as AI takes over the transactional, the industry actively invests in the interpersonal, the experiential and the vocational dimensions of hospitality that no technology can replicate. Ireland's tourism sector should advocate strongly for tourism-specific pathways within national AI skills frameworks, ensuring that the Francis Brennans of the future still have a way in.

The Digital Delta: Regional Adoption

AI adoption risks widening the gap between well-resourced urban tourism businesses and less digitally mature rural or regional operators, and in doing so, it risks undermining one of the most important strategic priorities of Irish tourism policy: regional balance and visitor dispersal.

The ITIC survey confirms that adoption is highest among nationwide organisations (83%) and Dublin-based businesses (58%), while operators on the Wild Atlantic Way (42%) and Ireland's Ancient East (44%) trail behind. The risk is structural. AI discovery platforms surface the destinations and businesses that have the best-structured, most accessible, most machine-readable digital content. A well-resourced Dublin hotel group will invest in GEO, structured data markup and AI-ready booking systems. A family-run guesthouse on the shores of Lough Derg will not, not because it lacks ambition, but because it lacks time, budget and technical support.

If the AI-driven travel planning ecosystem is fed primarily by the digital output of Ireland's largest and best-resourced operators, AI will not disperse visitors more broadly across the country. It will concentrate them more narrowly. The Hidden Heartlands will become more hidden. And the economic benefits of tourism growth will accrue disproportionately to the operators and regions that were already doing well.

Addressing the Digital Delta requires proactive and targeted intervention. Regional tourism organisations, local enterprise offices and national tourism bodies must work in partnership to build the digital capacity of rural and regional SMEs, ensure that national tourism data infrastructure captures Ireland's full geographic breadth, and design AI adoption supports that are genuinely accessible to operators outside the major urban centres.

7. Key Recommendations

The evidence gathered through the ITIC industry survey, expert interviews and national policy analysis points to a clear and consistent set of priorities. The following ten recommendations are presented as the foundation of a coordinated sectoral response to AI in Irish tourism. They are grounded in the specific characteristics of the Irish tourism sector, its SME intensity, its dependence on authentic human experience, its regional dispersal ambitions and its particular vulnerability to AI-driven discovery shifts, and they are designed to be actionable, not aspirational.

Recommendation 1: Develop and Resource a Sector-Wide AI and Tourism Action Plan

Rather than a standalone AI and Tourism Strategy, which risks duplication with existing national frameworks, experts interviewed recommend the development of a focused, funded and time-bound AI and Tourism Action Plan, integrated within the National Tourism Policy Statement's Digital Transition Strategy. This Action Plan should set clear targets, assign accountability to named bodies (with Fáilte Ireland and Tourism Ireland as co-leads), commit to annual reporting on progress, and include a governance mechanism to ensure delivery. The survey finding that 78% of respondents actively support, and a further 18% are open to, a dedicated strategic response (96% combined) reflects a sector that is ready to act but in urgent need of direction.

Recommendation 2: Establish a National Tourism Data Infrastructure

Ireland's visibility in AI-driven travel planning depends on the quality, accuracy and accessibility of its digital content. Fáilte Ireland and Tourism Ireland should lead the development of a National Tourism Data Infrastructure: a trusted, structured and openly accessible repository of destination, product and experience data, maintained to the technical standards required by AI discovery platforms. This is the single highest-leverage investment the sector can make to improve AI discoverability for Irish tourism businesses of all sizes, across all regions.

Recommendation 3: Launch a Tourism-Specific SME AI Adoption Programme

Modelled on Scotland's publicly funded SME AI Adoption Programme and tailored to the specific realities of Irish tourism SMEs, this programme should provide practical, hands-on support for smaller operators to adopt AI tools in marketing, operations and customer service. It should be delivered through trusted intermediaries, regional tourism organisations, local enterprise offices and industry associations, and funded through a combination of the National Training Fund, Enterprise Ireland and EU Digital Decade resources. Supports should include training workshops, case studies from comparable Irish businesses, one-to-one advisory support and technology vouchers.

Recommendation 4: Invest in Generative Engine Optimisation (GEO) for Irish Tourism

As travellers increasingly use conversational AI for destination research, Ireland's tourism content must be optimised for discovery in AI-generated responses, not just traditional search engines. Tourism Ireland and Fáilte Ireland should lead a coordinated programme of Generative Engine Optimisation, ensuring that Ireland's destination content, covering the full geographic breadth of the country including lesser-known regions, is structured, accurate and machine-readable. This programme should be monitored regularly, with Ireland's representation in major AI travel tools tracked as a key performance indicator.

Recommendation 5: Develop a Tourism AI Ethics and Best Practice Framework

To support responsible AI adoption and protect the authenticity of the Irish visitor experience, ITIC recommends the development of a Tourism AI Ethics and Best Practice Framework,

aligned with Ireland's National AI Strategy and the EU AI Act. This framework should provide clear, practical guidance for tourism businesses on where AI adds value and where human interaction must be preserved; on data governance and GDPR compliance in AI systems; on the ethical use of AI-generated content; and on shadow AI policies that protect organisational data without driving behaviour underground.

Recommendation 6: Commission Annual AI and Irish Tourism Research

Ireland currently lacks robust, regularly updated data on how AI is changing traveller behaviour specifically in relation to Irish tourism. It is recommended that Tourism Ireland commission an annual research programme tracking AI adoption among Irish tourism businesses, AI usage patterns among inbound visitors, and Ireland's representation and positioning in major AI travel tools. This research should be published openly and used to inform the annual review of the AI and Tourism Action Plan.

Recommendation 7: Address the Digital Delta Through Regional AI Support

To prevent AI from widening the gap between urban and rural tourism operators, it is recommended that regional tourism organisations be resourced to provide dedicated AI adoption support to businesses in less mature tourism regions. This should include a regional digital audit programme, identifying businesses with the greatest AI readiness gap and prioritising them for targeted support. National tourism data infrastructure investment should explicitly prioritise the geographic breadth of Ireland's tourism offering.

Recommendation 8: Integrate AI Literacy into Tourism Workforce Development

ITIC recommends that AI literacy be integrated into all national tourism workforce development frameworks, including apprenticeship programmes, further education qualifications and continuing professional development for tourism managers. Tourism-specific AI training modules should be developed in partnership with ITIC, Fáilte Ireland and higher education institutions, and made available through accessible, flexible formats suited to the time constraints of SME operators. The National Training Fund should be unlocked to support AI upskilling in the tourism sector as a matter of urgency.

Recommendation 9: Protect and Invest in the Human Dimensions of Irish Tourism

As AI absorbs transactional and administrative tasks, the sector must actively invest in the irreplaceable human dimensions of the Irish visitor experience. It is recommended that a dedicated programme be developed to support the interpersonal, cultural and experiential skills that define Irish hospitality, funded through tourism workforce development supports. This programme should address the Francis Brennan Problem directly, ensuring that the automation of entry-level tasks does not remove the career pathways that have historically produced Ireland's most exceptional hospitality professionals.

Recommendation 10: Engage with AI Platforms at National Level to Protect Ireland's Tourism Interests

As a small number of global AI travel platforms emerge as dominant intermediaries between travellers and destinations, Ireland's tourism interests must be actively represented in those platforms' governance, content standards and data practices. It is recommended that Tourism Ireland develop an active engagement strategy with the major AI travel platforms, including emerging agentic booking platforms, to ensure that Ireland's full tourism offering is accurately, comprehensively and authentically represented. This should be accompanied by advocacy at EU level for AI platform regulations that protect smaller destinations and operators.

8. Conclusion

Travel is more exposed than most industries to the impact of new technology. The industry has benefited extensively from advancements in both transport infrastructure and digital information systems. These technologies created immense opportunities for destinations, brands and platforms to share their story and stimulate visitor demand. They also fundamentally changed traveller expectations and consumer behaviours. AI represents the third wave of this disruption. It is here to stay. The question is not whether Irish tourism will be affected by it, but whether the sector will shape the transition on its own terms.

Looking Back to Look Forward

When technology has disrupted travel in the past, there have really been only two kinds of force at work: those that move people, and those that move information. Aviation, motorways and rail networks moved people into Ireland and around it. The internet, booking engines, DMO websites and social media moved information, shaping perception and demand. These two forces reached a kind of equilibrium in the 2010s. The infrastructure was mature. The information ecosystem was sophisticated. The loop between inspiration and booking was closing.

AI breaks that equilibrium. It is not simply a faster way to move information. It is a system that synthesises, decides and acts. It does not present a list of options for human evaluation. It constructs an answer. And in doing so, it shifts the locus of control from the traveller and the destination to the algorithm that mediates between them. This is a structural change, not an incremental one. Destinations that understand this will adapt. Those that do not will find themselves described, curated and ultimately defined by systems they had no hand in shaping.

Putting a Hand on the Scales

The integration of technology and the internet into the travel industry created a unique opportunity for destinations, brands and travel businesses. The flow of information on the internet is not a democracy. It created a distinct advantage for the destinations that knew how to put their hands on the scales and shape the type and format of information potential visitors see and consume. This shift gave rise to an entire industry of digital branding and travel advertising.

For most of the sector, this is the reality they have grown up with and are living with every day. It is far removed from the early days of travel planning when the onus of information discovery was on the traveller.

In the long-term view, this has also created a shift in consumer behaviour and decision-making. In less than a few decades, the consumer has moved from being an active travel planner in a world of limited information to being a recipient and target of a global destination advertising and travel information machine. The consequence is that travellers are often overwhelmed by destination advertising, travel options and special offers, and are seeking more than anything authentic and trusted information. The proliferation of information has not led to a more informed consumer, but a more discerning one.

Faster Horses

The commonly cited, and likely misappropriated, quote goes that when Henry Ford was asked how he responded to consumer demand he stated: “If I had asked people what they wanted, they would have said faster horses.” Regardless of its roots, the quote gives a perfect demonstration of how we think about the adoption of technology as iterative and progressive. The conversation of how AI can impact travel and tourism is rooted in minimising decisions, curating information, creating efficiencies and absolving decision-making. This is a very logical conclusion to come to when we reflect on how digital technology has disrupted travel and how consumer behaviour has responded accordingly.

AI is very much here to stay and is already proving its worth. As we grapple with this third wave of technology adoption and disruption, we need to expand our mindset for how we can adopt new technologies across our industry. We need to be able to understand and articulate the gaps, challenges, applications and opportunities clearly. We need to ask ourselves: are we actually ready for real change, or just looking for a faster horse?

The Irish Opportunity

Ireland is not without advantages. The country’s tourism product, built on authentic human connection, distinctive cultural identity and natural landscapes, is precisely the kind of offering that AI-fatigued, choice-overloaded travellers increasingly seek out. In a world of algorithmic homogeneity, Ireland’s imperfections are its strengths. The unscripted pub conversation. The local guide who goes off-route. The guesthouse owner who remembers your name. These are experiences that AI cannot generate and that no amount of content optimisation can fabricate. But these advantages will not protect themselves. The evidence in this report is clear: the sector recognises the importance of AI (66% see it as essential), but it has not yet matched that recognition with strategy (15% have one), with capability (only 11% of AI users feel fully equipped), or with the data infrastructure that AI systems require. The window to act is open. It will not remain open indefinitely.

High Tech, High Touch

The central argument of this report is that Irish tourism does not face a choice between technology and authenticity. It faces a design challenge: how to deploy AI in ways that amplify the human experience rather than dilute it. The principle is simple. AI handles the transactional. People deliver the exceptional. AI manages the booking, the pricing, the review response, the multilingual query. Human staff, freed from administrative burden, invest their time and energy in the warmth, knowledge and personal connection that no technology can replicate.

Moving Forward

The new Irish Tourism Policy document has made a very clear statement about the need for the industry to take advantage of the efficiencies offered by Artificial Intelligence and new travel technologies. The ten recommendations in this report are designed to move the sector from aspiration to action. They call for a funded Action Plan with clear accountability. A National Tourism Data Infrastructure that ensures every corner of Ireland is visible to AI. A dedicated SME support programme that meets operators where they are. An ethics framework that gives the sector confidence to say where AI belongs and where it does not. And a commitment to the human dimensions of Irish hospitality that must be protected as actively as the technology is embraced.

The industry is not looking for faster horses. It is looking for the confidence, the capability and the coordination to adopt this new technology effectively. AI is inevitable. The goal is not to resist it, but to shape it so that it amplifies, rather than dilutes, the unique character of the Irish welcome.

Appendix: Survey Methodology

The ITIC survey on Artificial Intelligence and Irish Tourism was conducted between 26 and 30 January 2026 and distributed to ITIC member organisations. 73 valid responses were received. Respondents represent a broad cross-section of the Irish tourism ecosystem:

By organisation type: Visitor Attractions and Activities (38%), Destination Marketing Organisations and Local Authorities (14%), Accommodation Providers (10%), Tour Operators (7%), Airlines and Carriers (3%), Activity/Experience Providers (4%), Tourism Support Services (4%), Academic (5%), and Other (15%).

By geography: Dublin (42%), Nationwide/Multi-regional (25%), Wild Atlantic Way (16%), Ireland's Ancient East (12%), Ireland's Hidden Heartlands (4%).

All percentage figures in this report are calculated on the full base of 73 respondents unless otherwise stated. For questions relating to AI tool usage, areas of application, efficiency savings and self-assessed capability, the base is the 45 respondents who confirmed using AI in day-to-day operations. Where sub-sample sizes are small (fewer than 15 respondents), findings are presented with appropriate caution and the base is noted.

FACT CARD

Irish Tourism and the AI Journey

Irish Tourism Industry Confederation (ITIC) | 2026

AI is reshaping how the world discovers, plans and experiences travel. Tourism Ireland research confirms that over 30% of overseas travellers now use AI for destination research - rising to one in two among US visitors, Ireland's most valuable market. When a visitor first imagines coming to Ireland, that moment of inspiration is increasingly mediated not by a Google search but by a conversational AI tool. If Irish tourism is not represented in that response, it does not exist for that traveller at all.

73

Organisations surveyed

62%

Currently using AI

66%

See AI as essential

15%

Have an AI strategy

96%

Support a national AI strategy

KEY FINDINGS

AI Adoption	62%	Using AI - but 52% describe their stage as early or experimental; only 5% have achieved extensive integration.
The Strategy Gap	15%	Have a dedicated AI strategy, yet 66% see AI as essential to competitiveness. Conviction is not matched by preparation.
The Content Trap	78%	Of AI users focus on copywriting & content. Only 20% use AI for pricing or revenue management.
The Skills Barrier	64%	Cite skills & awareness as their top barrier. Cost ranks fifth at 32%. The industry needs education before capital.
Behind the Curve	5%	Believe Irish tourism has adopted AI well. 38% say it has not; 56% say the picture is mixed.
Céad Míle Fáilte	49%	Worry AI threatens the Irish welcome. The report's answer: AI handling the transactional frees people for the exceptional.

High Tech, High Touch

The industry is split 49/51 on whether AI threatens the Céad Míle Fáilte - but this is a false choice. AI deployed thoughtfully, handling the transactional while freeing people for the exceptional, can strengthen the Irish welcome rather than diminish it. AI manages the booking, the pricing, the review. Human staff, freed from admin, invest their time in the warmth, knowledge and personal connection that no technology can replicate.

The policy environment is supportive but execution is lagging. Ireland's National Tourism Policy Statement, the National Digital and AI Strategy 2030, and the AI Advisory Council recommendations all name AI as a priority. The frameworks are in place. What is missing is sector-specific implementation, dedicated funding, and the urgency of execution for the 46,000 tourism enterprises - 90% of them SMEs - that comprise the industry.

10 RECOMMENDATIONS

Grounded in the specific character of Irish tourism - designed to be actionable, not aspirational.

1 STRATEGY

AI & Tourism Action Plan

A funded, time-bound Action Plan within National Tourism Policy. Fáilte Ireland & Tourism Ireland as co-leads with annual reporting.

2 DATA

National Tourism Data Infrastructure

A trusted, structured, AI-readable repository of destination, product and experience data across all regions.

3 SMEs

SME AI Adoption Programme

Practical, hands-on support for smaller operators via regional tourism organisations and LEOs. Funded through NTF and EU Digital Decade.

4 DISCOVERY

Invest in Generative Engine Optimisation

A national GEO programme ensuring Ireland's full destination content - including lesser-known regions - is machine-readable for AI travel tools.

5 GOVERNANCE

Tourism AI Ethics & Best Practice

Clear guidance on where AI belongs and where it does not: data governance, GDPR, ethical content, and shadow AI policies.

6 INSIGHT

Annual AI & Tourism Research

Commission annual tracking of industry adoption, inbound visitor AI usage, and Ireland's representation in major AI travel tools.

7 REGIONS

Address the Digital Delta

Resource regional tourism organisations to deliver targeted AI support. Ensure national data infrastructure captures Ireland's full geographic breadth.

8 SKILLS

AI Literacy in Workforce Development

Integrate AI literacy into apprenticeships, FE qualifications and CPD for managers. Unlock the National Training Fund for tourism AI upskilling.

9 PEOPLE

Protect the Human Dimensions

Fund support for the interpersonal skills that define Irish hospitality. Ensure automation does not remove career pathways that produce exceptional hosts.

10 PLATFORMS

Engage with AI Platforms Nationally

Active engagement with major AI travel platforms to secure accurate Irish representation. Pursue EU-level advocacy for regulations protecting smaller destinations.

The industry is ready to act. It needs direction, support and urgency. [itic.ie](https://www.itic.ie)