

Discussion document: A new framework for the tourism policy in the EU

I. General context

Tourism is one of the activities endowed with most significant potential to generate growth and employment in the EU. Moreover, tourism contributes to the development and socioeconomic integration in rural, peripheral or less developed regions. In 2006, tourism in its narrow definition¹ contributed some 5% to EU GDP. It was represented by 1.8 million companies, employing directly approximately 9.7 million people, i.e. about 5.2% of the working population². However, the indirect contribution of tourism to GDP is much higher: tourism, together with the related sectors³, generates indirectly more than 10% of EU GDP and accounts for almost 12% of total employment. The rate of job creation in tourism is higher than the average of the European economy as a whole. During the last decade, the annual growth rate of employment in the tourism sector has almost always been higher than the growth rate of total employment.

In international tourist arrivals statistics⁴, the European Union consistently appears as the number one tourism destination in the world, with 380 million international tourist arrivals, representing 42% of the total number of international arrivals in the world recorded in 2007⁵. The income generated by foreign tourists at EU level amounted up to 75.6 billion € in 2007⁶.

The European Union also represents an important source of tourists: in 2008, the number of trips made by EU residents, independently of the destination and duration of travel, exceeded 1 billion (1.4 billion trips)⁷. In terms of expenditure, the EU ranks first at international level, with tourism spending by the Community residents outside the EU of 94.2 billion € in 2007⁸.

However, in order to be able to maintain the role and the position of the EU as the number one tourist destination in the world, the European tourism should adapt to an increasingly large number of challenges (such as, for example, the EU tourist enterprises' capacity to absorb innovation and new technologies, the increasing international competition, etc.) so as to avoid losing market share in relation to other regions of the world. At the same time, it will be important to strengthen the attractiveness of the European destinations for EU tourists, who account for 85 - 90%⁹ of the international tourists in the EU. This will also contribute to the consolidation of the European citizenship feeling.

¹ Traditional travel and tourism providers (hotels, restaurants, cafes, travel agencies, car rentals, airlines etc.) that supply goods and services directly to visitors

² **Study on the Competitiveness of the EU tourism industry; September 2009** (see http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=5257&userservice_id=1&request.id=0)

³ Namely, distribution and construction sectors, as well as transport companies in general (transport by air, by rail, by sea, intercity busses etc.)

⁴ The concept of "international tourist arrivals" includes non-EU tourists as well as intra-community/inbound tourists who visit a country other than their residence country.

⁵ UNWTO, **Tourism 2020 Vision, Tourism Highlights 2008**

⁶ Eurostat, **Statistics in Focus, 23/2009**

⁷ Eurostat, **Tourism Statistics**, 2008

⁸ Eurostat, **Statistics in Focus, 23/2009**

⁹ Eurostat, **Statistics in Focus, 25/2007**

Like all the economic sectors, tourism was affected by the recent economic downturn, but has proven to be, nevertheless, one of the most crisis resistant activities. The two Eurobarometer surveys¹⁰ on tourism carried out in 2009 showed that the European tourists continue traveling, even if their attitudes tend to adapt according to the circumstances. This underlines the fact that, during the last decades, tourism became an important aspect of the European citizens' habits. Thus, in 2008, 53,9% of the population of the EU (aged 15 or more) made at least one holiday trip of at least 4 overnight stays with in Europe or elsewhere.¹¹

The European Commission has already launched several initiatives in the field of tourism, in particular:

- EDEN - promoting the European Excellence Destinations of Excellence,
- CALYPSO - encouraging the exchanges, in the low season , among 4 categories of tourists and between the Member States,
- "Sustainable tourism" - promoting the cross-border cycling networks, as well as the good practices related to cycling networks and to the possibilities of cross -border cooperation.

These initiatives will however expire in 2011 (EDEN) and 2012 (the two others).

Moreover in 2009, the Commission started a series of discussions with the representatives of the Member States and the different public and private stakeholders from the sector in order to explore possibilities of consolidation of the European tourism policy framework. The discussions enabled the identification of several possible action fields. These action areas were further confirmed and completed by the results of the Study on the competitiveness of the EU tourism industry, which was published in October 2009 (study for which the main actors of the tourism sector were consulted)¹².

Lastly, the entry into force of the Lisbon Treaty, which foresees a new competence for the EU in the tourism field, changes the institutional context for the European tourism and offers the opportunity for a political initiative from the Commission in the field of tourism in 2010.

II. OBJECTIVES

This document of DG ENTR invites to continue the consultations started in 2009, in view of preparing a future Commission Communication. This Communication will define a consolidated framework for a European tourism policy . It will also outline the measures to be undertaken by the Commission, in close cooperation with the Member States and their regions, with the industry and with other actors from the tourism sector, as well as the measures to be undertaken by all these actors themselves.

¹⁰ Eurobarometer surveys about the attitudes of Europeans towards tourism, March and October 2009: http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=5302&userservice_id=1&request.id=0)

¹¹ Eurostat, **Tourism Statistics**, 2008

¹² Study on the Competitiveness of the EU tourism industry; September 2009 (see http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=5257&userservice_id=1&request.id=0)

The intervention of the European Commission will be done according to the subsidiarity and proportionality principles, as foreseen by the Lisbon Treaty. The initiatives will aim at supporting, coordinating and supplementing the measures undertaken in the Member States through initiatives which have a European or at least multinational dimension and a high added value in comparison to purely regional or national initiatives.

The new framework for the EU tourism policy should propose as main goals:

- to stimulate the competitiveness of the tourism industry
- to strengthen the development of a sustainable tourism in Europe
- to promote Europe in the main markets in third countries.

What is the opinion of the European tourism stakeholders with regard to enhancing actions, at European level, around these 3 main objectives?

III. FIELDS OF ACTIVITY

With a view to supporting, coordinating and supplementing the measures undertaken in the Member States and in due respect of the Member States' and their regions' tourism policies, several main fields of action could be envisaged, as outlined below.

1. Stimulate the competitiveness of the tourism sector in Europe

Proposed actions:

- Extension of the high season in tourism: encourage holiday trips and tourist exchanges in low season (in order to better use the tourist structures and facilitate a more stable and motivated workforce), particularly, with regard to four target groups: young people, seniors, persons with disabilities and families with low incomes.
- Raise the awareness of the industry, especially of the small and micro enterprises, to the importance of innovation.
- Strengthen the use of new technologies, in particular of ICT, by the public and private tourism actors and, in particular, by the SMEs.
- Promote the various financial instruments existing at European level among the various actors of tourism, in particular the SMEs.
- Strengthen the cooperation with the European and international organisations (ETC, OECD, UNWTO, UNEP etc.) as well as with the actors "creating knowledge" (universities, research institutions, public and private observatories).
- Support and encourage the creation of networks of research institutions, universities and as well as regional and national observatories, with a higher participation of national/regional authorities and National Tourism Offices.
- Enhance the knowledge of the tourism sector in particular through the implementation of European statistics and regular launch of surveys on the short-term trends of tourism demand and tourism supply in Europe.

2. Develop sustainable Tourism in Europe

Proposed actions:

- Continue implementing the EDEN initiative on the European destinations of excellence, in close cooperation with the National Tourism Offices and the regional authorities concerned.
- Support the development of other forms of sustainable tourism.
- Encourage the use of systems of indicators for the sustainable management of destinations with a view to allowing a better sustainability monitoring at local and regional level.
- Encourage initiatives for the promotion of responsible practices by the European tourism enterprises, in their activities within the EU, as well as in third countries.
- Promotion of responsible attitudes of European tourists, through the organisation of public awareness campaigns (in the choice of their destinations and means of transport, as well as in their relations with the local population in the destinations visited). The awareness-raising campaigns should also include the fight against the exploitation of children and women.

3. Promote the "Destination Europe" in the main third countries

In order to be able to make better use of the potential of the numerous emerging economies in the main third countries as markets of origin for European tourism, it is important to enhance Europe's image and its perception as a tourist destination well known for its diversity, excellent quality and sustainability of its destinations.

Proposed actions:

- Enhance Europe's image in the principal main markets of the third countries (United States, Japan, China, Russia, India, Brazil etc), through the creation and promotion of the brand "Europe", in close cooperation with the Member States and other public and private tourism actors (European and international associations, National Tourism Offices, Non-Governmental Organisations and representatives of European tourism industry). The brand "Europe" should adequately reflect Europe's main strengths and values (diversity, quality, history, culture, safety, etc.) and differentiate it from other international destinations;
- Consolidate the cooperation, at the public authorities' and industry level, with the main emerging economies (China, Russia, India, Brazil etc), as well as with the non-European countries of the EUROMED region and other developing countries or regions considered as a priority for the EU.

IV. CONSULTATION

DG ENTR would appreciate to receive from all public (regional/national) and private stakeholders (industry, trade unions, civil society, universities etc) their comments and additional proposals with regard to proposed actions described in this discussion document, **by 26 February 2010**, with indication as to their degrees of priority and indicative timetables for their implementation by all the actors concerned.

It will be particularly important to know:

- *What is the opinion of the stakeholders in tourism sector about the actions proposed in this document?*

- *Which implementation possibilities are proposed by tourism stakeholders?*

- *Which other initiatives could be envisaged, taking into account the various good practices existing in the Member States and throughout the industry?*

The Commission will analyze in detail the results of the present consultation, in order to prepare, together with the Spanish Presidency, a European Conference with the participation of Ministers/Secretaries of State for tourism and the high level representatives of private and other public stakeholders acting in the field of European tourism. This conference will take place in Madrid on 14 - 15 April 2010, before the informal Meeting of the Ministers for Tourism, planned for 15 April.

On the basis of these various consultations, the Commission will prepare a Communication on a new framework for a European tourism policy, to be adopted in 2010 and to be addressed to the Council and the European Parliament, as well as to the Economic and Social Committee and to the Committee of the Regions.