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# Compilation Stakeholder Survey Results

**Intermediary Deliverable**

GRO-SME-20-C-081/a

GRO-SME-20-C-081/b

GRO-SME-20-C-081/c

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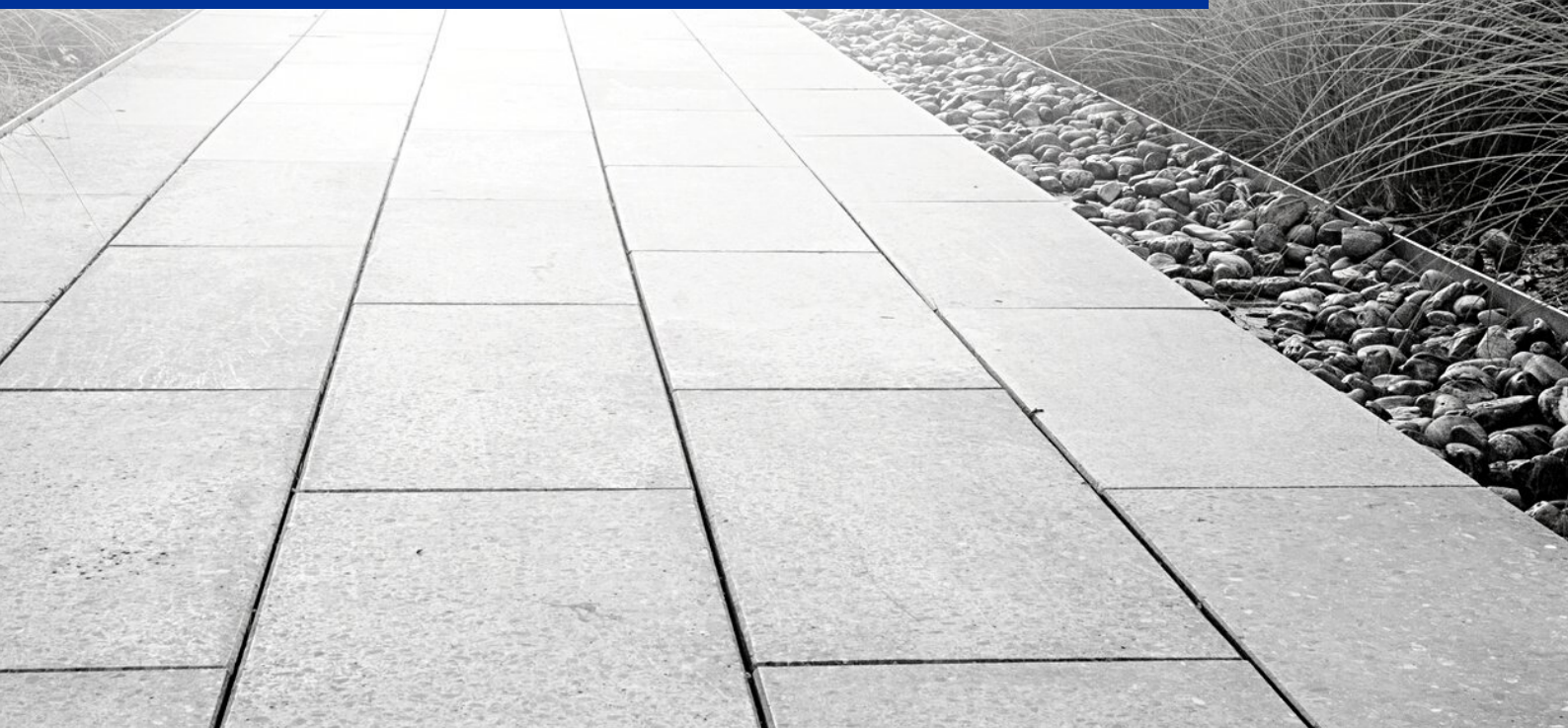
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# CO-CREATION OF A TRANSITION PATHWAY FOR TOURISM, FOR A MORE RESILIENT, INNOVATIVE AND SUSTAINABLE ECOSYSTEM.

## Stakeholder Survey

The European Commission adopted an updated New Industrial Strategy (May 2021) highlighting the need for Europe's industry to lead the green and digital transformations and to drive Europe's global competitiveness and strategic autonomy. The Commission proposed the co-creation of transition pathways with stakeholders as an essential collaborative tool for the transformation of industrial ecosystems. Tourism is the first industrial ecosystem to prepare such transition pathway for a green and digital transition, in order to reach in 2030 a resilient tourism ecosystem, which works effectively towards the commitments of the EU Green Deal and Digital Decade.

The consultation process gathered evidence from more than 180 stakeholders that responded to a stakeholder survey from June-September 2021. The results of the survey are used as the first inputs contributing to defining the transition pathway topics that are subsequently discussed in a series of stakeholder workshops.

The report is structured into three themes, led by tourism experts for the **Resilient Transition** (Prof. Ko Koens), the **Green Transition** (Prof. Xavier Font and Mr. Will Font) and the **Digital Transition** (Prof. Barbara Neuhofer).

The report is structured by the questions of the survey. First, emerging issues are identified and summarised as key transition topics. Second, propositions of concrete targets for 2030 and milestones for 2025 to measure the progress are presented. This is followed by concrete actions, roles and responsibilities to reach these objectives for each of the stakeholder levels, including the European Commission, member states and regions, destination and industry level. Finally, contributions are presented summarising the proposed costs and benefits for reaching these scenarios, along with concrete actions that organisations would be willing to implement towards reaching these scenarios.

# Respondents' Statistics

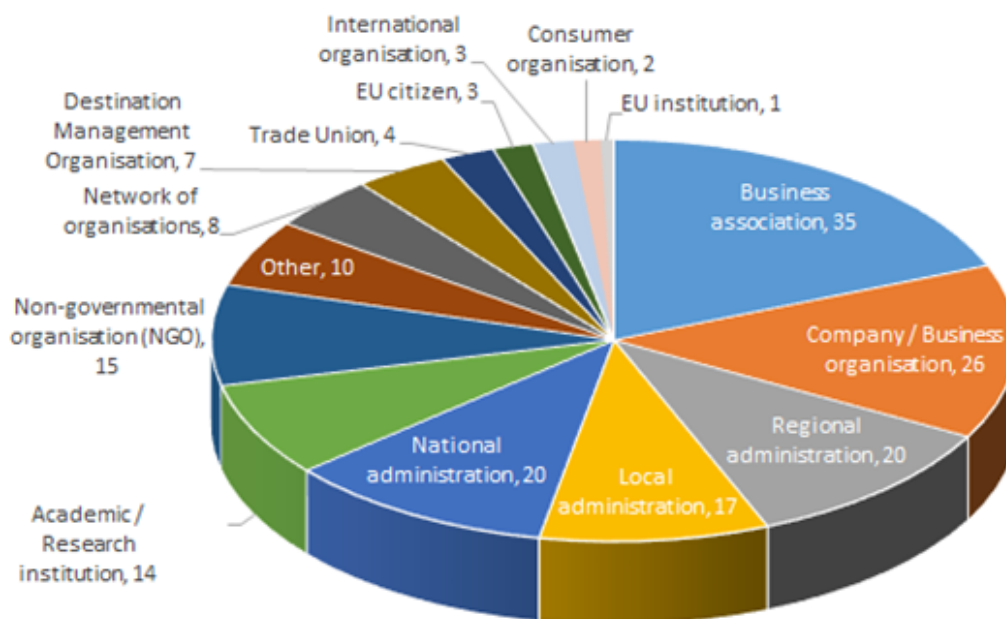


Figure 1: Summary of Participants' Organisations

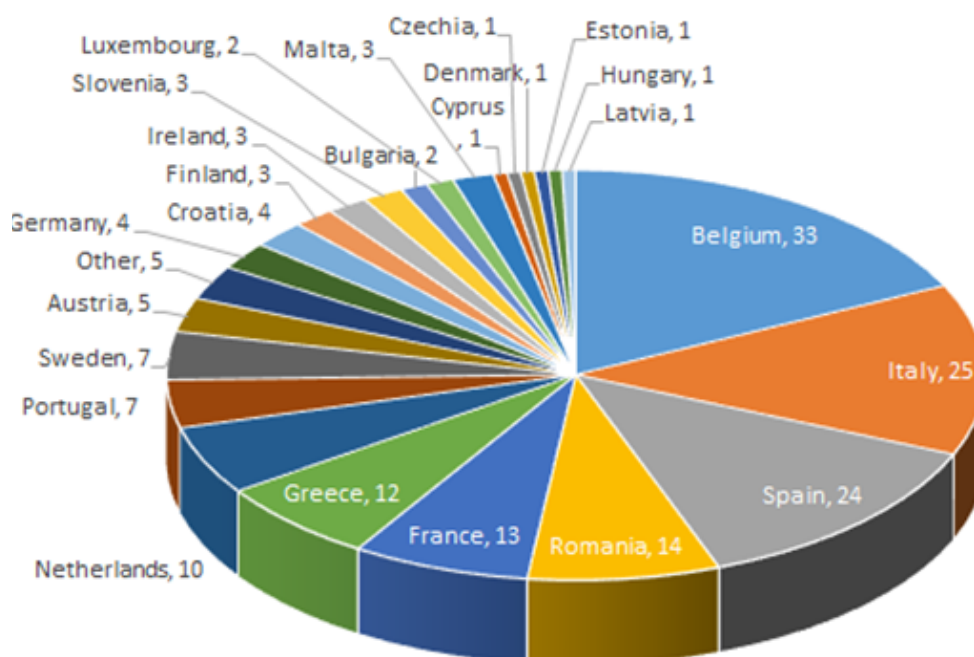


Figure 2: Summary of Participants' Nations

# **1 Resilient Transition**

## **Survey Analysis**

**Prof. Ko Koens**

## 1.1 What additional or different issues would you propose to be ambitiously considered for the development of a resilient tourism ecosystem?

### Topic Resilience 1: Adaptive capacity for a changing world of tourism

The first topic deals with future uncertainties and the necessity of tourism destinations and businesses to be (come) able to deal with and adapt to shocks and crises of differing nature. Disruptive events may be expected (e.g. climate change) or sudden (e.g., COVID 19); local or global, due to natural causes, social in nature (refugee crisis, wars) or even a tourism related (destination maturation and overtourism). To be prepared for this, tourism stakeholders and destinations need to have the ability to adapt, whilst at the same time clear targets and actions are needed to mitigate the chance of disruptive events and crises happening and crossing critical tipping points.

#### Adapting to changing circumstance and future uncertainties and ensure better preparedness for disruptive events

- Growing resilience against climate crisis
- Find ways of dealing with migrant crisis
- Focus on domestic and regional tourism to increase adaptive capacity
- Ability of SMEs to adapt / adaptability of business models to deal with crises
- Paradigm shift is needed, innovation central to overcome paradigms of maturation
- Changing policy frameworks
- Revisit regulatory framework's ability to cope with pandemic events
- Dealing with sudden weather anomalies such as heatwaves, fires, droughts
- Cut red tape, particularly for smaller businesses

#### Measures to mitigate impacts and prevent tipping points

- Innovation in business and SME development
- Change dependency on air travel and focus on closer markets
- Look at cooperatives as more resilient and viable way for small business survival
- Support the development of start-ups oriented to new products
- Mapping of business models in sector
- Provide vaccinations to eliminate threats
- Improved approach to health testing and certification



### **Immediate support in times of crises**

- Clear communication with consumers
- Ensure consumer rights and consumer confidence in times of crises
- Support destinations financially / Financial support during times of crisis
- Sufficient aid for businesses Boost tourism demand
- Seek to keep borders open during crises

## **Topic Resilience 2: Improving skills and ensuring quality of work in tourism**

Tourism is an economic sector with a large number of small businesses, while the industry also offers many opportunities for relatively low-skilled employment. These characteristics mean that tourism can help support people who might have difficulty getting into the labour market, as such contributing to more resilient societies. At the same time, a lack of skills can hinder entrepreneurs and staff to further their business or career. Also, critics have argued that the quality of work in tourism is relatively poor, which may make the industry less desirable to work in, lead to a high level of staff-turnover, and even shortages of staff. For a more resilient tourism sector and a more resilient society, it is necessary to ensure that it is possible for those working in tourism to improve their skills and that the quality of the work is of a high level, with staff having a sense of pride and ownership of the business they work for.

### **Ways of improving skills**

- Employer branding and work place health promotion
- Upskilling of tourism workers, also in Short Term Rental Services
- Improve education system with regards to tourism
- Focus on soft-skills
- Training programmes for environmental and social awareness
- Lifelong learning
- Training and innovation are key
- Capacity building for SMEs

### **Ways of ensuring quality of work**

- Continue work on health and safety protocols
- Keep seasonal staff year-round and use quieter periods for education and innovation to maintain attractive to staff
- Strategies to improve working conditions
- Facilitate outflow and inflow of (temporary) tourism workers
- Reinforce health and safety
- Inclusion of staff in decision making

## **Topic Resilience 3: Destination governance for supporting well-being for all**

Tourism needs places that are attractive to visit and places may use tourism to become more attractive. As such there is the opportunity for a mutually beneficial relationship that strengthens local resilience. At the same time, the overtourism debate has highlighted how in multiple places groups of people actively voiced their concern that tourism no longer benefited their well-being or the local their environment. Resilient destinations benefit from a symbiosis between tourists and local. Achieving this will require a holistic perspective to tourism, where cross-sectoral connections, communication and planning can lead to flourishing stable, yet flexible destinations.

### **Cross-sectoral engagement**

- Symbiosis between tourists and local residents, cross-sectoral connections & governance of tourism (eco)systems (stable yet flexible)
- Holistic approach to tourism system
- Focus on interconnectivity of actors in tourism destinations to identify areas where individual actors can contribute
- Interlink with transport sector, common agenda, sustainable mobility, investments in communal infrastructure
- Build comprehensive view of tourism, including facilities that are not directly tourism focused (culture, heritage, nature, local retail and arts)
- Cross-sectoral development approach - Place/site development and place attractiveness, rather than development with a narrow focus on tourism - planning between policy areas will be more closely interlinked, regarding for instance spatial planning, water supply, local services and recreational arrangements
- Enhancing transversality among sectors: tourism and culture, tourism and environment, tourism and industry;
- Current ecosystem needs should be encouraged to move towards a fairer transition where barriers and silos are broken
- Need for balance between tourism and local facilities



## **Methods of connecting different stakeholders and city users in planning**

- Co-planning with tourists
- Enhanced bottom-up tourism strategy towards inclusive growth
- Residents as integral part of planning and decisions
- Distinguish between resilience of tourism systems and how tourism systems contribute to overall resilience of destination
- How to mobilise different stakeholders
- Contextual approach, built on local, rather than global multinationals
- Address low level of connectivity within and between stakeholder groups
- Diversify tourism model and focus on locally authentic experiences (multidisciplinary tourism)
- Current ecosystem needs should be encouraged to move towards a fairer transition where the needs and demands of more fragile citizens are seriously investigated
- Enhance role of Destination Management Organisations
- Improve communication between stakeholders

## **Suggestions for alternative tourism governance systems**

- Partnerships for integrated sustainable services to tourists
- Promote public private partnerships and co-management
- Prevent unfair notions such as lobbying, tax evasion and syndicates
- Micro-segmentation of the industry to create more locally suited tourism
- More flexibility in regulation
- Reduce administrative burden for funding

## **Topic Resilience 4: Supporting equity, accessibility and social impacts of tourism**

The positive social impacts of tourism can relate to both the communities that are visited as well as tourists. However, a critique on current practices is that the benefits are not always shared equally and that certain groups face a certain level of exclusion. A resilient tourism should pay attention to these issues and strive for inclusivity. For visitors, it is important that tourism is accessible to all. This includes people with physical disabilities who may struggle with current tourism infrastructure, but also, for example, the extent to which the LGBTQI community feels welcomed. A particular issue with social issues such as these, is that they are difficult to 'measure' and report upon in a uniform way. This can hinder the extent to which stakeholders or destinations can be held accountable.

## **Supporting equity**

- Investigate how tourism impacts on residents
- Remove excessive burden on SMEs – current systems are more suited for large enterprises
- SMEs do not know about support programmes
- Improve communication between stakeholders
- Promote common values of tourism
- Distribute tourism more over the year and over destinations
- Reduce seasonality

## **Ensuring accessibility**

- Accelerate seamless multimodal transport system (e.g. trains)
- Solidarity tourism – access for all, including low-income families
- Improve access to tourism
- Take into consideration the needs of people with disabilities

## **Engage and measure social impacts**

- Move beyond good intentions
- Define common standards / norms for indicators as well as KPIs for success
- Support the development of monitoring systems that embark on the principles of (subjective) wellbeing instead of welfare only
- Focus on social impacts of tourism
- Improve sources to inform travellers about rules
- Standardise tourism statistics, data gathering methods and indicators
- Look for ways to increase positive impacts of tourism (stimulate interaction, pride, health, etc.) rather than mitigate negatives
- Tame hunger for economic growth and profit and focus tourism as generator of positive social-economic impact in destination that contributes to livelihoods
- Operationalize SDG for tourism, particularly aimed at how tourism can contribute to SDGs and to overall (subjective) wellbeing.

## **Other cross-over topics**

Within the discussion on resilience, the comments also focused on the other two key topics. This is not surprising as resilience can be seen as a holistic concept that - at least in part - also focuses on processes and ways of working. These can be applied in different contexts. In the case of green and sustainable tourism, several respondents focused on the need to engage with climate change to meaningfully engage with climate change in a systemic way. Other environmental issues were also mentioned, highlighting the relationship between sustainability and livability. The relationship with the digital theme was more operational in nature, in that respondents highlighted ways in which digital means could support a more resilient society. This could be due to digital capacity building, innovations

for critical issues, or greater knowledge on information and data, also via data sharing.

### **Using digital means to ‘overcome’ issues that hinder resilience**

- Integration of visa systems (by digital means)
- Use technology to overcome pandemic mobility limitations
- Enhance digital capacity of hospitality SMEs
- Digital city networks to share experiences.
- Involve more all 4 level Digital Innovation Hubs (EU, National, Regional, Local DIH, especially local ones!)
- Use the Digital Twin model for all kind of Tourism stakeholder networks and SMEs
- Support EU based business innovation and data empowered platforms

### **Climate change and other environmental issues**

- Skills for sustainable and digital and resilient futures
- Deal with waste and pollution for increased liveability
- Climate Change is key issue for the future
- Impossible to look at resilience without looking at sustainability

## **1.2 What additional or different common output scenarios for 2030 would benefit the development of a resilient tourism ecosystem? Please propose concrete targets for 2030 and milestones for 2025 to measure progress.**

A wide range of targets and milestones were provided by the respondents. Targets related to all four topics, albeit that many targets were relatively abstract and were focused more on discussing the way tourism, or wider society even, should develop, rather than specific milestones measurable targets. In addition, certain respondents provided environmental, digital or economic targets, which are not directly related to resilience. Respondents mentioned that specific hard targets and milestones are difficult to calculate, particularly for SMEs and that softer targets may be necessary for resilience. At the same time, for the theme supporting equity, accessibility and social impacts, the majority of targets and milestones related to a monitoring system, possibly because this is in itself a practical and visible output and easier to define than process based targets. All this is not to say no milestones and targets were provided, but it does highlight the difficulty respondents may have had to operationalise resilience in more specific terms.

### **Adaptive capacity for a changing world of tourism**

- Create a Crisis Fund for Tourism
- Reduce the impact of seasonality by developing off-season tourism strategies, including by changing holiday schedules, combining leisure and teleworking.

- 70% of tourism enterprises have business strategies towards targeting both tourists & residents in their tourism activities
- Research report into the survival (resilience ) strategies adopted by Tourism MSMEs during the pandemic
- 2025: European crisis contingency plan, including a crisis manual, relevant actions to mitigate negative effects on tourism / intra-community mutual aid protocols for disasters
- 2025 key figures on the sector's economic prosperity (e.g. tourists arrivals, overnight stays, occupancy rates, tourist spending) are above 2019 levels
- 2030: energy consumption of hospitality establishments is below 2019 levels
- 2030: Clear scenario's showing a 55% decline of emissions, backed by concrete measures and real reductions
- 2030: Each member state must have at least in the 80% of their regions a well-structured DMO acting also as Crisis Management Centre (CMC) with specific standards and processes. These DMOs-CMCs will be coordinated having a bidirectional communication with the National Crisis Centre that will be part of the Tourism National Authority
- 2030: Developing EU incentive schemes to create innovative and adaptive/resilient business models in tourism
- 2030: 50% of local tourism businesses should be able to offer new products or services outside the touristic seasons
- 2030: At least 50% of tourism enterprises will combat the seasonality of tourism - that would not only ensure an optimal financial flow throughout the year but would also help to avoid overcrowding of areas in peak seasons.
- 2030: Europe is the number one tourist destination; Nights spent at tourist accommodation establishments have increased year on year across in cities, town and suburbs and rural areas
- 2025: SMART Tourist destinations to be identified. Indicators on SDGs target achieved for tourist infrastructure and IT smart booking (flexibility and wider competitive platforms) and services applied

### **Improving skills and ensuring quality of work in tourism**

- 30% of the SMEs of the tourism value chain have implemented actions to increase the quality of their products/services.
- 2025: New scenarios for a more resilient tourism sector would be a sector with a higher educational and training methods closer to the real aspects of the sector. A 2025 indicator would be the index for more staff training method and the implementation of new training courses and actions.
- 2025: More Member States to develop apprenticeship schemes at national level when compared to 2019
- 2025: Improve working conditions, targets: lower share of part-time, temporary contracts; increase share of workers staying longer in their job;

increase income levels in tourism; ensure gender equality, incl. equal pay, career possibilities; eliminate sexual harassment and violence at workplaces; fight the high levels of undeclared work

- 2025: a platform for life-long learning tool for Tourism have been piloted as a catalyst for reskilling in Tourism SMEs.
- 2030: majority of workers receive a training before starting the working functions
- 2030: Implementing an integrated work place health promotion system as a part of a holistic employer branding strategy in 75% of all large and mid-size tourism companies and 50% of all small-size tourism companies
- 2030: Develop consolidated legislations for smart and agile working in the tourism sector at EU level, with protection schemes for jobs that require the physical presence of employees
- 2030: Staff training is subsidised

### **Destination governance for supporting well-being for all**

- Develop a tourism manifesto, supported by the Commission, that provides a clear vision on the role of the commission in terms of responsible/regenerative tourism and roadmap with clear actions.
- Develop a knowledge exchange program, geared towards strategic foresight and future scenario development – helping stakeholders to proactively, interactively and collaboratively envision future situations to achieve and futures to avoid, identify the interventions that are needed and mobilize the coalition that are needed to act.
- Operationalize SDG for tourism, particularly aimed at how tourism can contribute to SDGs and to overall (subjective) wellbeing.
- A toolbox to assist the diversity of stakeholders for using tourism as a means. This toolbox must include roadmaps, tools and analytical frameworks that are scalable in the sense they can be applied and easily/pragmatically tailored to specific destination needs. Also, a support system is needed to assist stakeholders with such implementation.
- Increase of the percentage of destinations with public-private co-management
- Indicators could monitor a resilient tourism policy. In order to have a sharable and comparable approach, a core set of indicators may constitute a toolbox at EU level. For example, indicators could report about local and territorial presences, in and out flow of tourists, occupancy and seasonal or regular flows. It is important to underline that these indicators shall respect data protection and data privacy in compliance with EU rules.
- Other indicators should monitor the seasonality of tourism presence in destinations.
- 2025: majority newly opened establishments benefitted from public funding to develop sustainable practices
- 2025: promote the adoption of a European tourism promotion policy by 2025.



- 2025: Concept of Visitor's Economy has been widely accepted (hopefully before), all main stakeholders of a given destination in terms of attractiveness (museums, heritage, events, ...) are integrated into the tourism destination ecosystem as an active part, conscious of their importance and the need to work all together for the competitiveness and positioning of the destination.
- 2025: Innovators, community leaders and social change practitioners are present at 20 % high level industry and policy convenings
- 2025: There is a multilevel multistakeholder network and community of practice with proven changemakers, innovators and community leaders represented in 60% of working groups and including representatives of 50% of major relevant institutions and organisations
- 2030: produce a clear and formal definition of the different tourism governance systems and to define the way they inter-relate
- 2030: Innovators, community leaders social change practitioners are present at 60% high level industry and policy convening
- 2030: multilevel multistakeholder network and community of practice with proven changemakers, innovators and community leaders represented in 90% of working groups and including representatives of 90% of major relevant institutions and organisations in 2030

### **Supporting equity, accessibility and social impacts of tourism**

- Support the development of monitoring systems that embark on the principles of (subjective) wellbeing instead of wealth only
- Use of wellbeing indicators in the tourism sector with systematic survey and application at territorial level
- The majority of destinations have transitioned to value-based indicator(s) as the main measure for success for their tourism industry.
- trainings on disability awareness and to keep in mind the needs of persons with disabilities, families with children, as well as of our aging society. Help to develop ISO and European tourism standards which support accessibility and increase their use and awareness.
- create a map/app/program to find the accessible places (accommodation, restaurants, transportation, streets, historical sites and other attraction. Such initiative is taken for example in Paris for the 2024 Olympic games already and it could be further promoted at the European level.
- 2025: develop standards for eco-health tourism (join best experts from member states, including physiatrists, nutritionists, psychologists, tourist boards, health clusters, eco producers, eco hotels)
- 2025: adapt at least 80% of hospitality to the needs of the disabled
- 2025: 75% of main touristic destination of each Country are considerable fully accessible to people which are physically impaired
- 2030: 90% of main touristic destination of each Country to be fully accessible to people living with a disability



- 2025: ongoing process to gather data and feedback from community based stakeholders and make them accessible to all on an interactive online platform - first pilot achieved by 2025 – platform to be used by 30% of the ecosystem by 2030 (30% is an estimated tipping point for shifting a societal norm)
- 2025: majority newly opened establishments in the EU meet high energy efficiency standards.
- 2025: the proportion of direct bookings in hotels' websites exceeds the number of intermediated bookings via OTAs. In 2019, 21,7% of hotel bookings are made via email (12,9%) or via the hotel's website (8,8%) vs 29,9% of bookings made via OTAs.
- 2030 For each region have a relevant organization collect and manage data from all actors in industry.
- 2030: create a robust set of data-driven new indicators addressing a holistic governance and monitoring approach for smart tourism destination ecosystem.
- 2030: majority hospitality establishments in the EU undertook renovation works which reduce the energy consumption of their activities or buildings (including improved ventilation systems).
- 2030: 50% of hotel bookings are made via the hotel's website.

### **1.3 What should be the actions, roles and responsibilities to reach these objectives for each of the Commission, Member States / Regions, Industry, Destinations and other stakeholders?**

Respondents provided actions and roles for practically all stakeholders, albeit that the emphasis was on actions to be undertaken by the European Commission. This included funding, ways of regulation, providing frameworks for cooperation and setting up KPIs standards and norms. Member states are also viewed as able to provide support for industry and measure impacts, while regions are seen as able to take action by setting up cooperation or comparative benchmarks. For destinations and among industry an emphasis is also put on cooperation between stakeholders, and creating 'value'. Respondents had more specific expectations of other stakeholder groups, rather than their own. In addition, some actions are at odds with each other (e.g. increase flexibility of labour vs. strengthening labour law). At the same time, multiple respondents highlighted that strong collaboration between sectors and other stakeholders is extremely important to secure resilience. This would require new collaborative alliances through all the ecosystem and all levels, roles and responsibilities to achieve best possible synergies and results.

#### **European Commission**

- Issue a long-term scenario study that integrated transport and tourism and includes scenarios that achieve the common climate goals for the EU tourism sector.

- Have a crisis management unit taking a leading role in the swift and effective coordination for crises
- Set up a dedicated tourism programme in the financial frameworks of the coming years.
- Launch initiatives, information on funding opportunities;
- Provide supportive material, helping organizing partnerships between stakeholders, developing incentive-based policies .
- Create dedicated budget for strategic tourism vision to incentivize private sector to invest in strategic projects that would reinforce the competitiveness of the sector in Europe
- Consult with destination organizations at national, regional and city levels to establish KPIs, standards and norms. A thorough data analysis of tourism metrics (e.g., data triangulation, correlation analysis) to illustrate the clear relation between indicators
- Allocate/inform about relevant funding for regions/tourism businesses (e.g. the new guide of May 2021 being already a good tool);
- Emphasize stronger the joint responsibility of all stakeholders involved and the need to develop more insights about (1) how to effectively bring them together and (2) the role each actors has to play within the ‘system’.
- Open offices in cities and regions, have staff on site who are available to answer questions and problems of tourism businesses simply
- Strengthen the organizational and political (policy) role for tourism on the EU level (see also consultation documents to TRANS Committee on Future challenges of tourism)
- Set out laws, and provide funding for infrastructure investment
- Common regulation for all member states
- Elaborate a multiannual crisis plan and propose the creation of a Directorate-General for Tourism to coordinate these actions.
- Establish common guidelines for resilience and sustainable destination management
- Provide incentives for regional development of destinations in terms of markets, infrastructure, work force.
- Give funding, collect and promote best practices and create a database of the network of enterprises and product clubs at European level
- Take advantage of the upcoming Social Economy Action plan to make the link between tourism and social economy
- Strengthen the use of wellbeing indicators
- Stimulate the development of integrated projects among different sectors and supply chains with premiums score in the calls for proposals
- Give primary directions and (partially) the financial support for implementing them
- Set up a crisis management unit taking a leading role in the swift and effective coordination of future crises
- Generate a structured legislation pack that views attractiveness consolidation of a destination as a priority

- Recognise soft skills in policy formulation and consider ways to foster them
- Support grants or subsidies encouraging investment in new projects, with a strong recovery element for regions
- Consider flexible labour solutions to accommodate seasonal and part-time work
- Fund a robust data collection exercise on the tourism industry to ensure policy decisions are made based on sound evidence
- To recognise the value of business culture change, which can be as valuable as physical adaptations

### **Member States**

- Implementation of initiatives + information on funding opportunities, especially on Cohesion Funds
- Development of adequate and targeted health and safety protocols
- Implementation of training schemes
- Funding support for building renovations
- COVID 19 demonstrated the fundamental need for greater coordination across EU Member States on these matters. Whilst the Commission has a clear coordinating role, it is the role of the Member State and local authorities to implement the necessary policies.
- Consultation with the local population at the destination level.
- Defining norms and KPIs instead of simply monitoring data would help MS understand when a change in strategy is needed or not. This could be financed and coordinated by the Commission.
- Specify regulations to promote and finally enforce the implementation of a workplace health promotion policy in tourism companies
- Leading role in providing adequate funding through the Recovery and Resilience Facility (RRF)
- Providing tailored support for SME businesses in the tourism sector, recognising the value small and micro-businesses bring to communities.
- Consider flexible labour solutions to accommodate seasonal and part-time work. This will make the industry more resilient, allowing it to better respond the changes in demand
- Establish more friendly legal framework for small scale local products and services locally based and cooperate with national tourism associations of all industry spectrum for establishing transparent resilience measures (including restrictions)
- Give funding, collect and promote best practices and create a database of the network of enterprises and product clubs at national/regional level
- Design of institutional frameworks (laws, rules, guidelines and resources) to ensure a 'balanced' type of tourism development based on the balance between the interests of local communities, visitors and the local tourism industry.

- Research to identify possible alternative value-based measures; pilot test and experimentation, and education + methodological support
- Work towards better coordination on border closures and similar measures in future crises

## **Regions**

- Consultation with the local population at the destination level.
- Monitor/manage data about seasonality/tourism flows
- Ensure a 'balanced' type of tourism development takes place, based on the balance between the interests of local communities, visitors and the local tourism industry
- Implement new tourism policies based on territorial and local identity
- Design of institutional frameworks (laws, rules, guidelines and resources) to ensure a 'balanced' type of tourism development.

## **Destinations**

- Ongoing dialogue among all stakeholders should become a fundamental feature of the transition pathway
- Put host communities - local/regional authorities - at the heart of tourism planning & decision-making to improve their ability to cope with new challenges
- Use funding available to plan necessary investments & diversify their offer
- Undertake a value chain analysis and identify opportunities for localizing and diversifying supply chains and to enhance the value proposition
- Develop a barometer tool for early warning of imbalances of supply and demand, and longer-term risks/threats to tourism activities in destinations
- Coordinate actions locally, making the industry and stakeholders work together
- Work with the industry in public private collaborations
- Develop a structured system of benchmark with other European regions having best practices in specific tourism theme (for example cycling)

## **Tourism industry**

- Embrace the revival of rail travel over long distances.
- Revalue domestic markets compared to overvalued long-haul markets. The COVID-19 crisis has learned the tourism sector, this attitude is not resilient. Many DMO's in more rural regions, suffered much less from the crisis because their domestic guest took over much of the losses in international travel.
- Partner with the wider ecosystem as well as with the authorities to ensure that their positions are taken into account consistently. use funding available

to plan necessary investments & diversify their offer

- Undertake a value chain analysis and identify opportunities for localizing and diversifying supply chains and to enhance the value proposition
- Prepare public-private and private-private cooperation mechanisms/protocols to deal with the consequences of disasters due to climate change and/or human action
- Strengthen the national, regional and local tourism associations and increase their professional capacity to work as associations and become real partners for national, regional and local authorities.
- Improve working conditions and enhance qualification & training
- Invest in the development of new business models

## 1.4 Would you have any input for assessing the costs and benefits for reaching these scenarios?

Some stakeholders offered indications of potential costs and benefits that may result from the transition towards digital tourism. These costs and benefits have been divided into the four categories defined below, to illustrate the barriers or opportunities that they encounter. The suggestions are individual and context-specific so do not represent all issues or types of organisations, but aid in understanding the challenges and benefits that may be faced. These categories been developed through an examination of common costs and barriers across the green, resilient, digital areas and offer an integration as follows:

- **Behavioural.** Current attitudes and behaviours in organisations and society that can constrain or boost the achievement of a specific goal. This includes risk aversion to change/ willingness to innovate, and the lack (or existence) of organisational structures to address such goal.
- **Knowledge.** Lack (or existence) of knowledge and skills on the impacts of tourism, and the actions that can be taken to address such impacts. Either at individual, organisational or destination level.
- **Structural.** Lack (or existence) of suppliers, products and services, including technological innovations, that can constrain or boost the achievement of a specific goal.
- **Financial.** Lack (or existence) financial incentives to adopt a behaviour change, including potential earnings or savings from market access or operational costs.

### Examples of costs or constraints for Resilience:

- Interests of different stakeholders can differ, which makes cooperation more difficult (B)
- Lack of skills and training, particularly with regards to IT knowledge and a dynamic mindset (K)
- Limits knowledge of and cooperation between stakeholders (e.g. host community and industry (S)



- Difficulty to find insurance and insurance (S)
- Financial losses in the tourism sector (F)

#### **Examples enablers or benefits for Resilience:**

- Mobilized communities who dare to claim their right to speak (B)
- Life-long learning and skills training programmes (K)
- Benchmarking and developing a barometer to better understand the room for improvement related costs and benefits of aspects of resilience (K)
- Data provision and data sharing (K)
- A strong collaboration between sectors and other stakeholders (S)
- Adequate protection system that limits risks towards crises (S)
- Greater diversity in sources of income at destination level (S)
- Assuring liquidity and refunds, as well as a better coordination and limitation of any restrictions to travel (F)

### **1.5 What would be the concrete action(s) your organisation would be willing to (co-)implement towards reaching these scenarios?**

Similar to the targets and milestones, few specific actions were put forward by the survey respondents were. It was therefore difficult to attribute financial or human resources to the actions that were mentioned. They do however provide a starting point for the Commission to engage with stakeholders based on this initial understanding of expectations. When respondents provided more specific actions, this was commonly related to a specific area of expertise that the respondent wanted support on, in relation to their core business model, which suggests that these actions will not be undertaken unless financed by other means.

#### **Responses are structured by stakeholder type**

##### **National Administrations:**

- Share holistic place development approach
- Establishing a European strategy for the development of the tourism sector in line with the aims of the article 195 of the Treaty for the functioning of the EU

##### **Regional Administrations:**

- Implementation of different projects, initiatives and grants' schemes to support revitalization and stability of the tourism industry
- Organizing events with local, national and international participation;
- Establishing partnerships with other international entities working in the field of tourism promotion and development
- Act as a regional centre for collecting and managing data on the tourism industry
- More training actions and a more specific implementation of strategies in



implement more actions based on training activities with the collaboration of the sector.

#### **Local Administrations:**

- Develop Digital Competencies and Skills
- Apply for EU funds to implement smart solutions, such as Smart City, Smart City
- Collaborate as a pilot destination for the testing of technologies and implementation of the digitisation systems.
- Develop a complex and complete common digital system to create a network among all tourist organisations (public and private) operating at regional level to detect and monitor tourist flows in real time
- Create a regional management system for data and tourist info to be provided
- Simplify the reservation system for cultural and artistic sites
- Work with Open Data projects
- Participate in an Open Data Hackathons

#### **Destination Management Organisations:**

- Invest in staff with specialised digital competences

#### **International Organisations**

- Act as network of support in context of up/re-skilling workers and mitigation of seasonality

#### **Networks of Organisations:**

- Develop an Observatory on Social, Fair and Sustainable Tourism with qualitative and quantitative indicators.

#### **Business Associations:**

- Promote educational events, exhibitions seminar meetings
- Develop regional sustainability indicators
- Develop framework for visitor economy concept and proposed amplified tourism stakeholders integration
- Share new model of tourism development the basis for a new global economic paradigm

## **Trade Union**

- Cooperating on the future of tourism with EU institutions, on labour law, skills qualifications etc.
- Engaging in a sectoral dialogue committee with HOTREC to jointly address problems and challenges in the sector and find common solutions

## **Company / Business organisations:**

- Encourage the development of apprenticeship schemes at national level
- Best practices sharing on apprenticeship schemes developed at national level; sustainable practices and health and safety protocols
- Communication towards member organisations about the availability and possibility to access funding opportunities (if informed by the COM on the opportunities)
- Regular dialogue and engagement with the EU institutions and the European Commission in particular, with provision of sectoral data (a bottom-up and gradual approach should always be the way forward)
- Invest in re- and upskilling programmes for employees
- Share expertise and enter in dialogue with EC on achieving resilience
- Provide measures for inclusion of passengers with disabilities
- Participate in conversations around tourism resilience, specifically the objective of improving access to tourism and reducing regional vulnerability, off season tourism, accessible tourism and tourism and teleworking
- Bring value with regards to analysing and providing insights on new and meaningful data metrics
- Provide training (various respondents mention different topics)

## **Consumer Organisations:**

- Help in identifying where existing or new standards can support the realisation of a resilient and sustainable tourism sector for Europe, where legislation is not enough.
- Support making package travel regulation by 2025 to help transfer packages to another date without additional costs

## **Non-governmental organisation:**

- Further develop barometer tool to enable real time monitoring and mitigation of risk to tourism operators
- Provide value chain analysis for companies
- provide training and support awareness raising as well as best practice examples

- Develop a sustainable social economy model, with an inclusive, responsible and intelligent approach, which at the same time guarantees the health of residents and visitors
- Co-organisation of awareness raising campaign for the promotion of resilient tourism and accessible destinations

### **Academic / Research institution**

- Developing scenarios based on our transport and tourism models and tools
- Act as facilitators in eco systems development tourism and mobility living labs
- Develop knowledge exchange programme, observatory for tourism (mega)trends and developments and key conditions destinations need to improve their resilience and a supportive diagnostic toolbox for firms, destinations and regions

### **Other**

- Collection of good practices, research and analysis
- Designing and carrying out cooperation projects on tourism flows management
- Convening, representing and supporting a network and community of practices of proven change agents from across sectors, levels and geographies sharing the vision of a tourism where the norm is to use impact/sustainability focused KPIs, models, mindsets and norms
- Facilitating the uptake of new practices by destinations and SMEs:
- Providing a platform and network for SMEs to connect with each other, collaborate/support each other, and access practitioner generated knowledge, training and resources (funds, marketplace of green suppliers) to facilitate their adoption of new mindsets, practices and indicators.

# **2 Green Transition**

## **Survey Analysis**

**Mr. Will Font**

**Prof. Xavier Font**

## 2.1 What additional or different issues would you propose to be ambitiously considered for the development of a sustainable tourism ecosystem?

The inputs from stakeholders responding to the survey, complementing the content of the SWD, can be classified under four topics.

- Climate-Neutral Mobility
- Sustainable Consumption
- Circular tourism
- Sustainability Knowledge

However, it's important to note that numerous stakeholders indicated that they wished the Commission used a broader definition of sustainability, rather than focusing specifically on green aspects of the transition.

### Topic Green 1: Climate-Neutral Mobility

This topic brings together a large number of contributions that specifically referred to climate neutral mobility. We separate this topic from others relating to actions towards climate neutrality in other aspects of the tourism ecosystem due to the significant impact that mobility has towards the carbon footprint of the sector. While most responses referred to actions that can take place within the tourist destination, few of them spoke about modal transport changes and optimisation of transport to reach the tourist destinations (in relation to air transport).

#### Issues:

- Lack of rural transport options
- Lack of financial incentives for adopting a greener fleet of vehicles 2
- Boats with green technologies have a higher total cost of ownership
- Low cost of carbon intensive travel options
- Lack of resources to transition to green transport 2
- Lack of political commitment from all public sector bodies towards scaling up green transport
- Insufficient promotion of shift from cars to collective transport methods
- Lack of well-connected infrastructure for non-motorised transport options 2

#### Actions:

- Reducing individual international travel and increasing domestic tourism
- improving public transportation, such as trains
- Improve infrastructure for slow mobility
- Creation of climate neutral travel options

- Make sure that cost of travel is proportional to the emissions involved – carbon pricing for transport
- Elimination of short haul flights (<700km)
- Abolition of VAT on international train tickets
- Increase provision of night trains
- Use public funds for the provision of night trains
- Make the GHG emissions figures clear to all customers when choosing transport
- Increase the electric charging network and ensure sufficient hydrogen fuelling stations
  - Including at hotel sites and camp sites
- Create an international train reservation system
- Increase the number of flights using sustainable kerosene
- Simplify the process of combining modes of transport
- Improve tourist trails
- Improve quality of marinas
- Electrify public transport
- Electric car sharing schemes
- Increasing the time spent by tourists in destinations
- Enforce emissions standards and other sustainability requirements on maritime transport

## Topic Green 2: Sustainable Consumption

The topic of sustainable consumption makes reference to actions to increase the ability of recognising green and sustainable attributes of tourism products and services, both in the supply chain and for final consumers. This includes work on green/sustainability standards, measurement and reporting. The topic also includes other topics around methods to encourage a sustainable consumption of tourism, such as the geographical and seasonal distribution of tourism, and methods to encourage consumers to enjoy holidays while using fewer resources.

### Issues:

- Lack of shared framework for certification on sustainability
- Clear set of resources needed for adopting new indicators
- Maintain a territorial balance in the distribution of tourist flows between the coast and the backshore
- Lack of sustainability information for tourists
- Seasonality of the tourism industry
- Areas previously appreciated by locals becoming commercialised and overrun by tourists



## **Actions:**

- Labelling and Certification
  - Developing and implementing the Green Destination tourism label as one unified label across Europe
  - Incorporating sustainability criteria into star ratings for accommodations
  - Couple with additional fees on companies that provide highly polluting touristic activities
  - Ecolabel for transport services
  - Reduce cost of certification
- Creating targets
  - Should be tailored to different firms based on capacity
- Rewarding tourists for sustainable behaviours
- Additional promotion by member states and regions for destinations that meet the criteria for the European Charter for Sustainable Tourism
- Finding economic models that incorporate sustainability without considerably affecting the final price – making sure that sustainability is not just for individuals that can afford a premium experience
- Additional visibility for firms that obtain sustainability certifications
- Reducing overcrowding
  - by attempting to attract responsible tourists who intend to spend more on higher quality experiences – especially for fragile ecosystems
  - by improving the mapping and signalling of rural areas and thematic trails (such as Romanian mountain passages)
  - by helping destinations use online booking systems with time slots
  - by improving small scale tourism – supported by making EU funding easier to access for smaller firms rather than large firms that can afford to use more resources on developing more polished proposals
  - by extending the season
  - by reducing tourist flows
- Provide support for sustainability marketing

## **Topic Green 3: Circular Tourism**

The topic of circular tourism brings together a wide range of actions that tourism suppliers can undertake to reduce the negative environmental impacts from resource usage. These include reduction in the use of energy and water, reduction in the production of waste with particular emphasis on food and plastic usage, as well as changes in the production methods to reduce negative impacts to biodiversity deterioration. The methods suggested to achieve such reductions in resource usage, changes in the materials used, and the introduction of circular economy principles. Below we list some of the most common issues raised.

### **Issues:**

- Lack of support and networks needed to achieve circularity

- Waste in consumption of food and drinks
- Insufficient commitments to using local produce
- Economic benefits of tourism are often realised as leakages from the economic system, going to multinationals, whilst the costs are borne by local communities

#### **Actions:**

- Resource management
  - Reduce waste of natural resources by reducing the use of explanatory leaflets for destinations and converting to digital
  - Compulsory energy and water reduction
  - Increase the prevalence of affordable and clean energy
- Working on food waste issues, such as by donating food that would otherwise go to waste.
- Investment in experiential tourism
- EU could provide funding for the development of start-ups with innovative ideas for tourism
- Introducing supplementary fees to touristic packages to pay for sustainability initiatives
  - Any carbon offsets should only be permitted to be realised against national environmental projects
  - Shorten supply chains, by promoting local products and resources
  - Provide incentives to achieve this
- Improving energy efficiency of buildings in accordance with the Renovation Wave initiative and improving automation of buildings to optimise the use of resources (e.g. HVAC systems)
- Reduce single use plastics/ban on single use plastics

## **Topic Green 4: Sustainability Knowledge**

The topic of “Sustainability Knowledge” addresses the issues around the insufficient sustainability knowledge base of the tourism ecosystem and the lack of a shared framework for sustainability monitoring for destinations. To support and monitor the transition pathways of the tourism ecosystem, it is important to address the issues around data and indicators. Different initiatives and schemes exist at European level, confusing and overwhelming destinations and member states that are starting to embark in their sustainability improvement journey. Therefore, this topic aims to identify a transition pathway towards the development of a consistent multi-level framework for collecting and monitoring sustainability data.

#### **Issues:**

- Tourists don't see sustainability as having added value

- Industry still insufficiently aware of sustainability issues in tourism 4
- Customers still insufficiently aware of sustainability issues in tourism 6
- Policymakers lack access to data
- Lack of measurement 3
- Lack of promotion of sustainable tourism
- Weak governance inhibits progress on making tourism more sustainable

#### Actions:

- Measurement
  - Use of sensors and data to analyse behaviours of tourists
  - Measure the effects of tourism on sustainability
- Education
  - Improving tourism as a career option through providing training, to upskill workers, particularly on sustainability
  - Include themes of sustainable travel in school teaching curricula
  - Educate tourists to consume sustainably
- Strive for a small number of KPIs to agree upon.

## 2.2 What additional or different common output scenarios for 2030 would benefit the development of a sustainable tourism ecosystem? Please propose concrete targets for 2030 and milestones for 2025 to measure progress.

Stakeholders recognised the need to support any targets and milestones with a clear reporting and enforcement mechanism. Targets varied from being regulation-based, such as unifying and increasing the adoption of sustainability certifications, to mutual goals, such as more tourists consuming sustainable tourism services. Most stakeholders did not provide output scenarios or targets and milestones, but instead offered general observations about the proposed direction of change needed, and the list below pulls together the contributions made that were more concrete.

2030: Unified EU-wide sustainability certification

- 2025: Shared parameters and indicators created

2030: New Common law on sustainable production and consumption

- 2025: Identify indicators of best practice that can be used as a basis for regulation

2030: Training programmes in place to upskill on sustainability

- 2025: identify the skills gap in detail

2030: Majority of companies to use carbon measurement tools

- 2025: Make most companies aware of best practice on carbon reduction

2030: Most companies following EU regulation on action on food waste

- 2025: Majority of companies aware of EU action on food waste prevention

2030: Have all European Public Financial Institutions and most European banks assess the impact of sustainable tourism investments, based on a set of indicators - Business

- 2025: Have created a common set of indicators to identify the impacts of investments in sustainable tourism

2030: At least 40% of European tourists consuming sustainable/environmentally friendly tourism services – Regional administration

- 2025: At least 20% of European tourists consuming sustainable/environmentally friendly tourism services

2030: 100% of tourism educators should be qualified in sustainability skills and 75% of tourism education should include sustainability – Academic/Research Institution

- 2025: 50% of tourism educators should be qualified in sustainability skills and 40% of tourism education should include sustainability

2030: 30% of Sustainability focused enterprises and organisations have access to the networks they need to maximise the scale of their impact.

- 2025: 10% of Sustainability focused enterprises and organisations have access to the networks they need to maximise the scale of their impact

2030: At least 50% of abandoned railways in Europe be converted to greenways (ie cycle and walking routes)

- 2025: At least 20% of abandoned railways in Europe be converted to greenways

2030: At least 50% of destinations certified as Green Destinations and at least 50% of the businesses in these destinations also certified - NGO

- 2025: At least 30% of destinations certified as Green Destinations and at least 20% of the businesses in these destinations also certified

2030: 50% of coastal destinations should have implemented Maritime Spatial Planning (MSP) or Integrated Coastal Zone Management (ICZM) to improve management of coastal and maritime tourism activities - NGO

- 2025: Achieve at least 25%

## **2.3 What should be the actions, roles and responsibilities to reach these objectives for each of the Commission, Member States / Regions, Industry, Destinations and other stakeholders?**

It is worth noting that most respondents included specific expectations for the European Commission, particularly in relation to coordination and funding. The next notable point to make is that stakeholders tended to have a more specific list of expectations from other stakeholder groups except their own. Below we list some of the most common actions, roles and responsibilities mentioned in the survey responses.

Respondents typically emphasised the Commission's role in coordination and funding activities, whilst many also mentioned that they wanted European funding to become more accessible with less red tape, but that they would also prefer to have clear regulation to aid in achieving new KPIs.

Stakeholders expect Member States to implement regulation and offer funding opportunities in addition to support for industry to achieve sustainability goals. Destinations were expected to provide data, preserve the identity of the destination and work closely with the community and local industry to support them in a positive sustainable development. Industry was expected to implement sustainability plans and provide data to help with the evaluation of the sector's progress.

### **Commission**

- Coordinate action and research, including measurement x11
  - Provide funding to enable SMEs to engage in measurement
- Intensify the rail network x5
  - Reduce costs, improve connectivity, including rural areas, increase capacity
- Promotion of best practice x5
- Provide guidelines and tools that are easily understandable and usable for SMEs x5
- Provide funding for the development of sustainable destinations x4
- Coordinate an awareness campaign targeting consumers, with the help of all stakeholders x3
- Provide regulatory framework x3
  - for the creation of new financial instruments
- Make it simpler for SMEs to gain funding and reduce the red tape involved in executing projects with those funds x2
- Finance the development of sustainable forms of travel x2
- Create guidelines for funding programs like Erasmus+ for sustainability education x2
- Create certifications that are easier to obtain
- Create KPIs
- Harmonise sustainable tourism measures across member states
- Implement stricter control on third country waste recycling
- Promote lower impact forms of transport
- Raise awareness and facilitate public-private partnerships
- Give guidelines for the integration of competences about sustainability in tourism for all member states
- Encourage cross-border interaction (such as with cycle routes)
- Ban single use plastics
- Support consumers in their transition to low carbon transport
- Measure the actual impact of the cruising industry
- Promote the creation of thematic paths

### **Member States**

- Support companies to meet their climate targets x4
- Supervise implementation of new regulation x3
- Financially support firms in the development of an economic model for sustainable tourism x3

- Regulate to ensure that sustainability is incorporated into tourism curricula x3
- Support sustainable mobility developments x2
  - Support the growth of electric car charging infrastructure, possibly with the use of public funds
- Advise the EU on the creation of new indicators x2
- Should provide destinations with EU-approved management tools x2
- Impose sustainability policies on the tourism sector x2
- Provide regulatory and investment framework x2
- Coordinate action and research x2
- Support consumers in their transition to low carbon transport x2
- Provide information on access to funding
- Ban single use plastics
- Engage with commission on examples of best practice to be used in the creation of a regulatory framework
- Create national awards for the best teachers and researchers in sustainable tourism
- Engage in forward-looking spatial planning to prevent urban sprawl
- Ensure that regulation and taxation does not diminish the tourism sector
- Invest in green infrastructure
- Encourage consumers to engage in responsible and sustainable tourism
- Create diagnosis reports of the current situations
- Make funding for all hospitality projects, conditional on sustainability being incorporated

### **Destinations**

- Advise the EU on the creation of new indicators x3
- Make the efforts and impacts of the tourism industry, relating to sustainability, more transparent to consumers x2
- Make industry and stakeholders coordinate to achieve sustainability targets
- Operate forward-looking spatial planning to minimise the destruction of green spaces
- Invest more in protection of the destination rather than in marketing
- Support the use of management tools within the destination
- Create new uses for abandoned heritage sites
- Integrate sustainable tourism with other sectors
- Create local grass roots campaigns with respected community leaders to enhance local sustainability and create a tourism policy document tailored to the area.

### **Industry**

- Create effective adaptation plans x4
- Use management tools to increase the sustainability of the services offered x3



- Incorporate the circular economy into tourism practises x3
- Provide data to regional administrations to help assess tourism impacts x3
- Create business clusters and cross-sectoral initiatives for sharing of best practice x2
- Present projects in line with the ambitious objectives of sustainable development x2
- Invest in infrastructure to mitigate over-tourism
- Create workplace sustainability education initiatives
- Express opinions and expectations for the regulatory framework
- Express point of view on the creation of indicators
- Express views, to commission, of the skills they believe trained professionals should have
- Adaption of employment profiles oriented on sustainability aspects so that strong qualifications in sustainability are more highly valued
- Collaborate with local administrations on finding innovative business models

## 2.4 Would you have any input for assessing the costs and benefits for reaching these scenarios?

Some stakeholders offered indications of potential costs and benefits that may result from the transition towards sustainability. These costs and benefits have been divided into the four categories defined below, to illustrate the barriers or opportunities that they encounter. The suggestions are individual and context-specific so do not represent all issues or types of organisations, but aid in understanding the challenges and benefits that may be faced.

- **Behavioural.** Current attitudes and behaviours in organisations and society that can constrain or boost the achievement of a specific goal. This includes risk aversion to change/ willingness to innovate, and the lack (or existence) of organisational structures to address such goal.
- **Knowledge.** Lack (or existence) of knowledge and skills on the impacts of tourism, and the actions that can be taken to address such impacts. Either at individual, organisational or destination level.
- **Structural.** Lack (or existence) of suppliers, products and services, including technological innovations, that can constrain or boost the achievement of a specific goal.
- **Financial.** Lack (or existence) financial incentives to adopt a behaviour change, including potential earnings or savings from market access or operational costs.

### Examples of costs or constraints:

- Network of Organisations – Awareness campaign costing at least 10 million euros needed to change perceptions of sustainable tourism among travellers (B)

- Other - Organisations networking on sustainable methods requires a substantial investment of time (K)
- Regional Administration – run pilot schemes for urban, rural and coastal destinations (K/S)
- Regional Administration – making legislative change (S)
- Business Administration – Investments may exceed returns (F)
- Academic/Research Institution – Long time horizon on sustainability investments (F)
- Business association – financial cost of reaching net zero for the top 50 European airports is estimated at 26 billion euros (F)
- Academic / Research institution - Cost of running grass roots projects within communities (F)
- Regional Administration – Developing new Key Performance Indicators (F)

#### **Examples enablers or benefits:**

- Business Association - Increased transparency on sustainability may increase demand for sustainable products and drive competition (K)
- NGO – businesses becoming more competitive through a more sustainable offer (S)
- Trade Union - Growth of socially responsible companies (S)
- Trade Union - Improved working conditions (S)

## **2.5 What would be the concrete action(s) your organisation would be willing to (co-)implement towards reaching these scenarios?**

The actions recommended by the survey respondents were typically broad, and not concrete. These actions did not lend themselves to attributing potential financial or human resources required to achieve them at this point. They however provide a starting point for the Commission to engage with stakeholders based on this initial understanding of expectations. Other concrete actions essentially related to the very specific area of expertise that the respondent wanted support on, for what is their core business model.

#### **National Administrations:**

- Provide support on projects and offer web resources
- Support implementation of pilot projects
- Work with the Commission to design support schemes for a green transition of tourism and transport, administering these schemes and collecting input and feedback from the sector
- Differentiate and diversify the nation's sustainable tourism offerings
- Participate in the design of public policy
- Provide professional training in the tourism sector
- Guide projects towards their proposed goals within the European framework

### **Regional Administrations:**

- Raise Awareness of sustainability principles
- Coordinate public actors
- Support adoption of environmental certifications by tourist destinations
- Sharing of good practices
- Co-financing of tourism projects
- Become a sustainable tourism destination - increasing the length of the tourism season, combatting food waste, support sustainable beach projects
- Create a platform that compiles all touristic activities for a destination alongside their individual ecological footprints'
- Continue actions related to soft tourism
- Create new actions to improve the balance of tourism flows across the territory
- Provide financing for innovative projects
- Organise skills-based training programmes
- Run a pilot action

### **Local Administrations:**

- Increasing urban green areas
- Protection of local areas
- Make buildings for tourism more attractive in quality and design
- Aid in the definition of a new sustainability label
- Organise seminars and conferences

### **Destination Management Organisations:**

- Support for projects, web resources and local awareness actions
- Draft and implement sustainable mobility plans
- Engage in developing a sustainability charter and commit to implementing it
- Support SMEs in developing a sustainability plan
- Become part of the global tourism plastics initiative
- Working to declare a climate emergency

### **International Organisations**

- Cooperate with the Commission on the European Tourism Dashboard, to align the organisations together
- Assist in the measurement of sustainability

### **Networks of Organisations:**

- Provide members with advice on accessing funding/advice for the installation of EV charging points

- Co-create a campaign to increase awareness of sustainable tourism practices
- Offer a program on the roles of DMO's in the Netherlands regarding the SDG's in co creation with DMO's and universities in the Netherlands.
- Provide a platform for SMEs to network about sustainability practices x2
- Enhance greenways across Europe
- Develop a tourism climate emergency plan
- Work on defining new sustainability indicators
- Encourage destinations to enhance less visited touristic areas and out of season tourism
- Aid SMEs in becoming greener

### **Business Associations:**

- Offer support to firms
- Define a new system of incentives
- Create a new certification for tourism firms within a nation
- Cooperation with the nation's government on implementation of policies
- Reduce GHG emissions from operations by 30% compared to 2005 levels
- Obtain feedback from touristic organisations regarding their experience of sustainability
- Best practice sharing
- Promotion of certifications to members
- Communicate funding possibilities
- Engage in dialogue with the commission
- Take part in and support Commission-led initiatives and industry coalitions designed to integrate sustainable practices into SMEs
- Support the design and content for an education and training framework on sustainability in tourism
- Developing a nautical routes initiative
- Provide input on the needs of the sector to achieve a green transition
- Continue running a certification programme and supporting the sustainability of the tourism industry
- Create Opportunities to share best practices
- Contribute to public-private dialogue and debate
- Disseminate information on initiatives to increase participation of SMEs
- Increase FDI flows to touristic enterprises in Europe
- Accompany SMEs in the task of becoming greener
- Develop methodologies for measuring the industry's direct and indirect GHG emissions
- Establish common mechanisms for reporting progress
- Information dissemination and provide support
- Build sustainable tourism schemes

## **Trade Union**

- Work on the development and promotion of social labelling schemes

## **Company / Business organisations:**

- Create educational initiatives involving secondary school students
- Commit to becoming climate positive by 2030
- Become certified as sustainable
- Collaborate with other businesses to optimise consumption of local resources
- Launch an indicator on air quality
- Contribute to the development of regulation and indicators
- Collaborate in the creation of policy
- Measure impacts of policy
- Provide Training
- Disseminate best practice information at an international level
- Provide advice on the most effective and relevant training needed by SMEs
- Promote sustainability standards to their network
- Widen the availability of the company's sustainability academy
- Create a sustainability agenda
- Share experiences
- Provide expertise

## **Consumer Organisations:**

- Communicate sustainable behaviours to members

## **Non-governmental organisation:**

- Awareness-raising campaigns aimed at tourists and enterprises
- Develop a set of common KPIs
- Campaigns and awareness-raising for tourists and enterprises
- Promote good practice of reuse of religious heritage sites
- Co-implementing a pan-European network for ecotourism destinations
- Promotion of cycle tourism as a sustainable tourism option
- Support monitoring and knowledge sharing
- Share knowledge gained from undertaken projects
- Implement projects to develop ecotourism in the Mediterranean

## **Academic / Research institution**

- Support the development of curricula, help with practical training and with quality assurance in sustainability training

- Engage in scientific research
- Contribute academic expertise
- Provide knowledge and tools
- Apply marketing techniques for engaging stakeholders and tourists
- Strengthen the topic of sustainability within the curriculum
- Create a set of indicators

# **3 Digital Transition**

## **Survey Analysis**

**Prof. Barbara Neuhofer**



### 3.1 What additional or different issues would you propose to be ambitiously considered for the development of a digital and innovative tourism ecosystem?

The following question is structured into a) issues and b) actions, categorised by the four emerging themes.

#### **Topic Digital 1: Data analytics and real-time experience management**

This topic brings together a large number of contributions that specifically referred to the importance of data analytics for digital tourism. This topic has emerged as the most dominant one in the stakeholder survey, suggesting its priority and importance. This topic is distinct from other digital issues in that it specifically focuses on the role, impact and usage of data towards a future data-empowered tourism. The key issues raised by respondents regard the access to, and collection, harmonisation, standardisation, analysis methodology, management and usage of data. With regards to the usage of data, three distinct fields of application emerge, including the use of a) historic data (for understanding and learning past tourism behaviours), real-time data (for analysing and making live adjustments and management on the go), machine learning and forecasting data (for predicting tourism flows, capacities, behaviours). The issues that can be addressed are far-reaching, from real-time experience management of tourism flows and crowding, to learning tourist behaviours, analysing ambient environmental data, to designing enhanced experiences and entirely new tourism offers that will emerge through the application of machine learning and recognition of patterns. The theme data analytics has horizontal implications, insofar that a strong data infrastructure is a common denominator to support the creation and dynamic real-time management towards sustainable and resilient tourism behaviours, experiences and practices in a tourism ecosystem.

#### **Issues:**

- Data owned by public authorities must be carefully handled
- Restrictions in innovative data sharing partly caused by the strict data protection rules with the EU
- Lack of legislative framework regarding the sharing of data between online platforms and the individual business users
- Lack of core set of comparable metrics in data
- Limited availability of open access data and reliance on few big companies owning data as gatekeepers
- Lack of data from the community and destination level to understand the impact of tourist activities

- Difficulty of access to data and difficulty in with data by SMEs
- Data are expensive if not open access
- Data monopolies further digital divide, some have data and competences to analyse these, others are not part of the game and fall behind
- Lack of structured data hubs and standardisation across European countries and destinations
- Awareness of high potential of data but lack of application due to current complexities in access and management and lack of expertise
- Lack of using the potential of forecast and real-time data to manage visitor flows to protect common resources, enhance visitor experiences and resident quality of life
- Lack of data competence in workforce and lack of tourism data analysts
- Lack of data teams and hubs to integrate and analyse interdisciplinary data
- Limited usage of real-time data while potential is recognised
- Low use of IoT technology and sensors to improve the quality of a destination
- Prevalence of out-dated historic data (overnight stays etc.) and limited usage of live data

#### **Actions:**

- Develop a European open data strategy
- Develop open data sharing hubs from and to DTO / SMEs
- Develop data hubs throughout Europe on every national and satellites of such hubs on a regional level
- Develop a network of interconnected data entities focused on tourism data research and analysis and the management of a shared European tourism data space
- Align indicators for data collection with other relevant international partners (UNWTO, OECD)
- Develop data-sharing agreement with major platforms on aggregated STR
- Develop data sharing practices that take into account reasonable remuneration, liability, competition, privacy and data security
- Ensure a balance between data collection and data protection
- Develop a European methodology of data standards, collection, harmonisation, analysis and platform for usage
- Develop benchmark-able reporting system across European destinations
- Create open data repositories
- Develop sector specific data hubs
- Enable ease of access to data hubs for SMEs
- Support SMEs with data hubs, data analyst expertise and competences on national/regional data hub levels
- Fund open data projects
- Create open data initiatives, e.g. data hackathons

- Develop sharing, recognition and awards for best practice projects of data use
- Enable real time strategic planning using common standards for data analytics
- Use data for historic analysis, real-time data management and predictive forecasting of tourism flows, experiences and practices
- Detect and monitor tourist flows in real time and create a regional management infrastructure
- Develop innovative real-time capacity management tools
- Develop data that is non-tourism specific and goes beyond arrivals, overnight stays, visitor, passenger data
- Integrate non-tourism specific data and use contextual ambient intelligence data (including air quality, traffic, people flow, water quality, temperature, resident wellbeing, etc.)
- Develop IoT and sensor infrastructure to analyse crowded places, quality of water or air, parking availabilities
- Develop smart and ambient infrastructure, including sensors and apps for energy, water, electricity, air condition, light, consumption in hospitality and tourism
- Use data to understand priorities of tourist and visitor profiles, e.g. reasons to be there, expectations, spending behavior, visitor satisfaction
- Develop systems for tourist information, reservation and booking for cultural and artistic sites based on real-time capacity data
- Manage tourism capacity with real-time data through pre-registration and booking and pre-planning in destinations by bookings, and live tourists flows with mobile/app geolocations
- Use social media powered data through machine learning to understand tourist emotions and experiences
- Use geotracking to monitor flows of tourists and transport and adapt tourist experiences in real-time
- Use data and machine learning to identify existing problems (e.g. crowding, lack of infrastructure) to enhance and design tourism experiences

## **Topic Digital 2: Digitalisation of never-ending tourism and virtual experiences**

This topic brings together a large number of contributions that discuss the importance of digitalisation and virtualisation of tourism experiences. This topic highlights tourism as a holistic activity that can be experienced across the entire customer journey, including pre-travel, during travel and post travel. This includes all digital touchpoints from digital information and content, (de) marketing, pre-booking of sites, mobile check-ins, digital ticketing, augmented reality at sites, digital information, and online sharing and evaluation of visitor satisfaction online. Adding to that, the novel concept of ‘never-ending’ tourism extends digitalised forms of tourism to the virtual space in which tourism becomes an on-going, omni-present and always-available possibility.

It creates a new tourism offer that allows for the continuous engagement and experience with a digital tourism office / destination before and after travel, and indeed creates a complementary or substituting offer of in-person travel, namely 'remote tourism'. The potential, value and importance of destinations offer digital twins and full circle virtual experiences is particularly highlighted in relation to a) pandemic travel restrictions, b) accessibility and inclusiveness and c) overcrowding and capacity management, and d) fragility of natural and cultural sites. Never-ending virtual tourism thus has major horizontal implications for much more integrated green and resilient forms of tourism in that it enables digitalisation of content, digitalises key touchpoints along the customer journey, and adds a new virtual layer promoting the absence or restraint in tourism mobility, overtourism, and overcrowding.

### **Issues:**

- Digital experience currently stop at the end of the tourist activity
- Fragmented digitalisation levels and fragmented availability of a full circle digital and virtual experience across customer journeys
- Lack and low level of digitalization of cultural and natural heritage, both of fragile and over-visited areas
- Lack of modelling tools to simulate destinations of virtual offers and digital twins
- Lack of virtual destination experiences
- Lack of integrated destinations using VR and AR in a new post-COVID tourism scenario
- Lack of alignment of online marketing strategies at European level

### **Actions:**

- Increase digitalisation of natural heritage and biodiversity destinations
- Increase digitalisation of fragile cultural heritage
- Increase digitalisation of VR experiences of overcrowded spaces
- Increase digitalisation of all tourist touchpoints (e.g. taxi, airport shuttle, ride-sharing service such as Uber, mobile check-in hotel)
- Develop offers that merge the physical and remote tourism experience of cultural heritage
- Reduce the consumption of paper in hospitality for check-in/check-out and promote green and digital processes
- Increase quality of hospitality websites, meeting standards defined in WCAG web accessibility guidelines, e.g. special needs
- Increase digitalisation of Schengen visa procedures
- Develop a synchronised European Covid live app and disseminate information to tourists

- Accelerate digitalization of travel documents and facilitation of (post-)pandemic seamless travel
- Increasing the number of mobile bookings
- Increase digitalisation of smart destinations
- Develop digital tools for organisations working in the field connecting cultural heritage, religious heritage, and rural tourism
- Increase digitalisation of tourist services, products and processes for SMEs
- Increase and promote use of new interactive digital media (e.g. VR/AR/XR, interactive screens, holographic projections, mobile and web apps)
- Develop digital twins and virtual experiences for integrated neverending remote tourism as a complementary offer to physical tourism
- Develop digital tourism offices as spaces to virtually travel and immerse in / have a virtual and physical presence
- Develop digital twins for destinations to benefit awareness and branding
- Refine and spread the knowledge of the concept of neverending Tourism
- Develop digital twins to address a lack of accessibility, pandemic travel restrictions, people with special needs
- Promote digital advertisements and digital meetings/events
- Develop digital experiences to bring to the forefront more local and authentic tourism experiences and locals ways of life
- Identify those visitors that should be a priority when making promotion or commercialization efforts
- Develop alignment for metrics to allow for de-marketing destinations and marketing proximity tourism

### **Digital Topic 3: Technology empowered destinations and transforming value co-creation**

This topic brings together a large number of contributions that discuss the role of digital technology in empowering smart tourism destinations, business models and activity and holistic value co-creation for all stakeholders. This includes the development of necessary interconnected digital infrastructure that transforms destinations into smart tourism destinations in urban and rural areas. Innovative future tourism ecosystems include the role of sharing economy platforms, such as short term rentals and new digital sharing business models that transform destinations as an area of tourism activity, living and wellbeing long-term. Tourism destinations are transforming by becoming extended living areas for new types of technology-empowered tourists that seek experiences of remote digital working, connect with sharing platforms to immerse in local co-living and embrace more conscious and transformative forms of tourism in destinations. Digital technology is a catalyst of this change as a day-to-day enabler, connecting diverse stakeholders and communities in the destination ecosystem with tourists for more sustainable, social and community based tourism practices.



## Issues:

- Dependence on OTAs and price leverage
- Dominance of monopoly of non-European giants in the sector of booking
- Insufficient legislation to better regulate digital platforms and employment and working conditions for those working through digital platforms
- Lack of creation of digital local ecolables to empower micro agriculture and food processing
- Unfair practices in the collaborative economy
- Fragmented legislative situation for online STR platforms across Europe
- Lack of best practice sharing to support digital innovations
- Limited use of Destination Management Systems (DMSs) by destinations and enterprises
- Lack of digital infrastructure that meets digital demands of visitors and consumers
- Lack or limited digital information about sustainable transportation, e.g. cycling paths on Google maps to support sustainable transport choices
- Lack or limited digitalisation of national and interconnected European transport systems
- Lack or limited digital multimodality transport system, causing poor accessibility to some local / European destinations
- Lack of common 5G infrastructure
- Lack of fair competition and a level playing field between all providers (e.g. legislative and fiscal obligations, permits for operation, registration of guests, employees' rights and protection, consumers' rights, health, safety and security, food hygiene rules, statistical measurement of economic activity, zoning in urban planning, etc.)

## Actions:

- Increase the digital infrastructure to meet the digital demands of digitally empowered visitors and consumers
- Increase number of urban tourism destinations to transform into Smart Tourism Destination (STD) by implementing IoT, Cloud computing, DMSs
- Increase digitalisation of DMOs (BI, CRM, ERP, Online Shop, Marketing automatisation...)
- Support the start-up of regional digital ecosystems to facilitate and simplify the experiential choices
- Increase digital infrastructure on a destination level (e.g. blockchain)
- Increase rollout of 5G to all rural and coastal areas to ensure micro and SMEs have access to fast broadband
- Increase equipment of exhibition venues with 5G
- Develop smart traffic controls for tourists
- Establish pilot projects for integrated AI, VR, AR, Big Data Analysis



- Increase sensors in smart destinations / cities
- Reduce the dependence of hospitality establishments on online intermediaries
- Develop smart infrastructure, including connectivity, digital infrastructure and services not only in rural areas but also in insular, peripheral and less known destinations and regions to distribute tourism flows
- Develop infrastructure and overcome digital divide between insular/rural and urban areas in terms of IT availability
- Collaborate with platform economy businesses for data-sharing
- Increase large online platforms using reservation technology and contactless payments
- Reduce the regulatory fragmentation in the STR sector and increase legal certainty for all – STR players, national/local governments and consumers
- Ensure legislative frameworks on STR accommodation through Digital Services Act
- Offer more tourism services on digital platforms (e.g. short term rentals)
- Promote innovation of sharing economy platforms, e.g. in the restaurant sector for food delivery
- Develop digital journey planners across all destination touchpoints (transportation, cycling)
- Develop innovative digital infrastructure, solutions and applications (for sustainable and green tourism, and new innovative experiences)
- Support increase tech startups and companies
- Develop smart tourism network of integrated European smart tourism destination
- Develop Europe as an integrated smart destination
- Develop balance between hospitality businesses and major online intermediaries
- Use digital tools to monitor the impact of tourism on society and communities
- Develop digital apps to monitor the quality of life / wellbeing / human health measurement instead of tourism volume KPI
- Develop destinations as places for a new digital tourist who visits, lives and resides in a destination
- Develop digitally supported proximity services in poly centric communities
- Develop new sharing economy platforms to boost new and alternative forms of tourism, such as the eco-tourism, agri-tourism, rural tourism experiences
- Identify new types and offers catered to post-pandemic tourism experiences (digital work, digital nomads, co-living)
- Support the development of new proximity tourism, digital nomads and telework tourism

## Topic Digital 4: Digital empowerment and knowledge of tourism providers and consumers

This topic brings together a large number of contributions that discuss the importance of empowering tourism providers, the tourism workforce and tourism consumers with information, knowledge and the skillset needed to embrace the digital transformation. Digital education plays a critical role across multiple levels, from a societal to micro business level. First, reducing the digital divide is paramount in creating an empowered and inclusive European digital landscape. Second, digital up-skilling and re-skilling is needed for the tourism digital workforce to develop digital human capital and integrate increasing the demands of digitalisation and robotisation of service delivery in enhancing and re-thinking tourism and hospitality workforce. Creating digital curricula and training is an important step to reduce the burden and empower SMEs, startups and micro businesses in developing the necessary competences that are demanded by increasingly interconnected digital markets and consumers. Third, digital literacy extends to the digital tourist who is able, empowered and educated to experience digital and virtual tourism. Digital tools support the tourist not only with navigating through digital offers and customer journeys, but also in making sustainable tourism choices that long-term create a more conscious and sustainable tourist.

### Issues:

- Lack of digitally empowered content and central hub for destinations
- Lack and limited SMEs and individuals developing new digital skills and mindsets
- Focus on a strong technical approach while lacking the development of a culture of competent digitalisation called digital literacy and digital ethics
- Lack of education by industry and consumers about critical and fundamental security risks, such as mis-use of big data, digital identity theft, and other forms of digital criminality
- Low level of digitalization of tourism destinations and SMEs
- Fast and high technical development places demand on jobs, new jobs, substitution of jobs, re-skilling and up-skilling necessity of jobs
- Lack of putting the user (tourist or local inhabitant) at the centre of the digital challenge
- Lack of tourists in digital skills – from booking to travelling
- Fragmented knowledge of digital knowledge on various stakeholder levels
- Low levels of re/upskilling efforts
- Insufficient knowledge base of the tourism ecosystem
- High cost and administrative burden (e.g. for SMEs) for digitalisation, research collaborations, innovations, funding
- Risk of overly digitalized market on the stakeholders, leaving non-digital stakeholders behind and creating further digital divide

- Lack of information on green consumption behaviour, choices and practices for tourists
- Digital divide from highly digitalised providers to IT-illiterates

### **Actions:**

- Reduce the digital divide
- Increase training to counteract digital divide for an inclusive digital European landscape
- Ensure IT-illiterates have access to (sustainable) travel information
- Develop platforms for sharing of best practices of digitalisation to educate and inspire others with concrete ROI examples
- Develop targets to be reskilled- upskilled for promoting the digitalisation of tourism SMEs, including specific groups, a) girls and women, b) NEETs and Young people, especially from marginalised groups (migrant background, rural areas and roma communities), and c) silver workers (seniors and retired wanting to have another source of income)
- Ensure the inclusion of most fragile identified groups within EU society in the digital skilling effort
- Train employees as data analysts on regional and national levels
- Develop competences of a better use of data and data sharing for business intelligence, analytics, more advanced statistics
- Develop the awareness and understand the benefits of being able to obtain, analyse and understand insights from data (existing and real-time) for historical monitoring and reporting, and live predictive forecasting and corrective measures in nowness
- Develop skillset to understand and use real-time data to correct marketing in real-time (marketing/demarketing based on monitoring live booking and numbers)
- Develop digital skills and digital tourism employee workforce
- Create awareness with digital apps for sustainable practices
- Support the creation of digital local eco-labels across supply chain
- Increase information for tourists to sensibilise and educate for sustainable tourism and allow for conscious choices (from booking with green filter to visiting on-site)
- Increase tourism companies offering awareness and tips on sustainable travel practices
- Increase visibility of sustainable choices, make them visible and easily understandable in decision making and booking processes
- Support the development of sustainability criteria to be included as part of online Develop digital carbon footprint calculator apps
- Develop communication and training and awareness building of tourists and stakeholders for smart sustainable tourism

- Create awareness of importance and adopt ecolabel visibility online (eg. on online booking platforms)
- Education of tourism workforce in digitalisation
- Increase automation of tourism jobs and create AI and robots integrated tourism and hospitality workforce
- Develop ambitious training strategies for tourism workers, including the improvement of digital skills e.g., Content Management System (CMS) systems in hospitality
- Increase digital training, re-skilling and up-skilling of human capital to counteract lack of tourism workforce
- Digital upskilling of SMEs
- Train employees with use of digital technologies at SME levels
- Support for small scale businesses for digital management and marketing
- Support micro and small enterprises to digitalise their products and services
- Support SMEs with appropriate digital and interoperable tools/platforms;
- Implement key digitisation skills integration in curricula, apprenticeship and training
- Support tech start-ups on regional levels
- Develop open innovation arenas for startups and creative innovative solutions
- Promote open innovation and business model innovation
- Develop networks of incubators and accelerators for knowledge sharing, collaboration across borders, facilitating the integration of technology, increasing access to finance and niche markets, as well as contributing to the development of new digital skills

### **3.2 What additional or different common output scenarios for 2030 would benefit the digitalisation of the tourism ecosystem? Please propose concrete targets for 2030 and milestones for 2025 to measure progress.**

Stakeholders recognised the need to support any targets and milestones with a clear reporting and enforcement mechanism. Targets varied from being regulation-based, such as regulating the STR sector, to developing shared infrastructure and standards, such as for digital data hubs and data analysis methodologies. Most stakeholders did not provide concrete output scenarios or targets and milestones tied to 2025/2030 milestones, but instead offered general observations about the proposed direction of change needed. The list below covers the contributions made that were most concrete. In case year targets are mentioned, these are included, or otherwise left blank.

**The following answers are sorted by theme.**

**Suggestions based on the 2025 / 2030 / 2050 timelines, where applicable:**

## **Topic 1: Data analytics and real-time experience management**

- 2030: More than 50% of the tourism businesses have a support action/contact with a Digital Innovation Hub, 70% in 2050
- 2030: 25% of businesses use of artificial intelligence solutions within EU business universe, 40% in 2050
- 2030: European destinations have forecast and real time data capacity and digital infrastructure in place to influence visitor movement and decision-making
- 2030: Each country has at least two research institutes dedicated to tourism
- 2030: 20% increase of digital tourism services
- 2030: 40% of tourism companies using AI solutions
- 2030: 40% of the tourism companies using blockchain solutions
- 2030: 50% of cybersecurity solutions used in tourism destinations
- 2030: 50% of tourism destinations have an open data platform
- 2030: 100% digitalised the whole process for obtaining various licenses in each country
- 2030: Have European and national Tourism Observatory centres based common methodology of data collection

## **Topic 2: Digital never-ending tourism and virtual experiences**

- Develop pilot regions for smart innovation
- Develop best practices of smart tourism destinations
- Develop best practices of digital twins and digital destinations
- Implement digital solutions for airports / airlines seamless contact points
- A digital CO2 footprint calculator for tourists, visitors, companies, destinations
- 2030: 100% national, regional and local destination websites and active social media
- 2030: 70% digitisation of Natura 2000 Network sites, and of natural heritage at risk, including 3D modelling and/or 360° visits, and online availability for further use, 30% by 2025
- 2030: 100% digital travel by screen and VR only
- 2030: 100% of service providers connected to an online booking tool
- 2030: 100% hotels have gone digital
- 2030: Have the agents of more than 5,000 cities trained and then go on to 10000 having all of them communicating continuously on developed online platforms with interactive presentations of regional/local natural heritage, biodiversity destinations and cultural heritage



## **Topic 3: Technology empowered destinations and transforming value co-creation**

- Dedicated support for small scale businesses in digital innovation
- Increase of destinations use DMSs
- Increase of smart destinations among rural destinations
- 2030: 100% overall network quality within the EU
- 2025: 100% rural connectivity
- 2030: 30% of urban tourism destinations transformed in Smart destinations
- 2030: 70% of destinations use DMSs
- 2030: 50% of regions start-up a regional digital ecosystem
- 2025: 100 pilot cities of Europe trained as smart destinations
- 2025: 100 smart tourism destinations
- 2030: Availability of a market sharing platform for all European hotels

## **Topic 4: Digital empowerment and knowledge of tourism providers and consumers**

- 2030: At least 50% of European tourism SMEs achieve technology level sufficient to ensure their survival when dealing with growing digitalized demand, 30% in 2025
- 2026: 50 formally recognized training courses to update the digital skills of human resources working in the tourism sector to be developed in EU countries, with the participation of training institutes, enterprises, digital agencies, tourism promoting agencies
- 2028: 50 matchmaking events focusing on tourism professional profiles with medium – advanced digital skills will be organised in EU countries
- 2030: 90% Upskilling of digital competences covering almost the total workforce active in tourism industry, with a percentage
- 2030: 95% of tourism SMEs have reached a basic level of digital intensity

### **3.3 What should be the actions, roles and responsibilities to reach these objectives for each of the Commission, Member States / Regions, Industry, Destinations and other stakeholders?**

It is worth noting that most respondents included specific expectations for the European Commission, particularly in relation to coordination, de-bureaucratization and funding. Respondents commonly emphasised expectations towards other stakeholder groups except their own. With regards to data provision, a consensus suggests that member states, regions and destinations are expected to coordinate data efforts and support SMEs in a practical and accessible manner. Proposed actions and responsibilities were generally rather vague. The list below covers the contributions made that were most concrete.



**These are divided by the levels of Commission, Member States, Regions, Destinations and Tourism Industry.**

### **European Commission**

- Develop proposal calls that target tourism MSMEs and emphasise technologies such as blockchain, Artificial Intelligence, virtual reality to focus on functional and usable day to day technologies that are of immediate and long term benefit to MSMEs
- Urge Member States to set up, individually or jointly, a digital booking platform based within the EU, in order to break the monopoly of non-European giants in the sector
- Create a robust governance framework for data sharing in the tourism sector, via legislative initiatives (e.g. DGA, Data Act) and voluntary schemes (e.g data sharing Code of Conduct)
- Support the building of technical and operational capabilities of Member States, regions and destination management organisations to appropriately manage (access, use, share) the data they receive as part of data sharing agreements
- Attain synergies between EU programs and touristic initiatives and coordinate programs to reach the full potential of benefits for the tourism sector
- Develop a European shared framework and methodology for data
- Intervene to reduce the regulatory fragmentation in the STR sector and increase legal certainty for all – STR players, national/local governments and consumers
- Regulate the platform economy
- Ensure equal rights for platform workers and for all new forms of (non-standard) work which might evolve in future
- Develop a new EU STR policy tool and involve Airbnb and other STR stakeholders
- Raise the profile of tourism as a quality employer by fostering innovation, entrepreneurial schemes, skill upgrades, reducing the seasonality and precarity of jobs
- Ensure that tourism workforce has access to new technologies and practices and sufficient support to become proficient users
- Promote lifelong learning and suitable training schemes for all in the tourism value chain
- Provide funding to adapt current educational and formation systems to the new challenge of the sector – digitalisation - and providing technical support and funding for the reskilling and upskilling schemes
- Develop a European coordinated online marketing strategy with applicability at European and national level
- Develop a solid EU policy framework ensuring safety and privacy for personal data across the EU

- Increase EU funding to strengthen the local and regional ecosystem within the sector, simplify schemes and procedures, which make funding hard to access especially for smaller entities
- Setup of 5G with financial and practical support needed to implement everywhere (EU, MS, region, city)
- Develop a database: to be set up, knowledge and financial support required
- Support the role of European networks of tourism managing authorities as NECSTouR as catalysers of the EU policies into the territories
- Define and promote standards to be applied on IoT sensors to make easy its use and to facilitate interchange of information
- Design and adopt a common methodology for data collection at the European level and guidelines for national Tourism Observatories
- Create a funding schemes for small scale operators and accommodations for marketing and networking
- Develop guidelines for the integration of competences about digital literacy in tourism for all member states, offering additional instruments such as platforms for the best tourism schools and universities offering qualification in digital literacy in tourism (management)
- Create guidelines for funding programs such as Erasmus+ in the field of digital literacy education and training (content development and didactics)
- Collaborate with the industry to forge skills partnerships under the Pact for Skills
- Develop Common European data space for tourism

### **Member States**

- Develop data hubs throughout Europe on every national level and satellites hubs on a regional level
- EC and the MS to promote the use of massive data exploitation programmes (Big Data) in decision-making and the design of new tourism products
- Develop a European coordinated online marketing strategy with applicability at European and national level
- Implement a national digital register of tourists but also an automated digital statistical system for tourism objectives
- Implement and enforce regulation for the platform economy
- Implement digitalisation strategies and projects
- Promote the use of PPP schemes for the creation of that kind of marketplaces
- Implement coordinated digital-enrichment of cultural heritage strategies and provide funding
- Develop regulation for development of integration of digital literacy in all fields of tourism curricula
- Support research in the field of digital literacy education and training
- Create national awards for the best teachers and researchers in the field of digital literacy in tourism education and training

- Develop a certification for high standards of big data ethics for platforms, especially in tourism, in order to become attractive for customers qualified in digital literacy
- Develop Digital Skills and Jobs Platform with the 25 national coalitions for digital skills and contribute to reaching the EUs Digital Decade targets
- Implement digitalisation strategies and projects, implement of National Recovery and Resilience Plans

## **Regions**

- Support the start-up of regional digital ecosystems to facilitate and simplify the experiential choices of the "new" digital tourist and also of those who reside and live in the destination
- Increase the cooperation for the exchange and reuse of data for public administrations, especially with tourism businesses (e.g. platforms of accommodation/travel providers)
- Develop successful data-sharing partnerships to ensure a higher capacity to forecast tourism demand, a better understanding of the diversity of demand and the ability to adapt the offer
- Development of digital skills within businesses, public authorities, and cultural institutions
- Improved infrastructures fit for new digital needs and demands
- Support tourism businesses through incubators and clusters aimed at facilitating the digital transition and increasing competitiveness via innovation and skills transfer
- Support national/regional (such as NECSTouR) best practice networks on digitalisation
- Implement digitisation strategies for natural heritage

## **Destinations**

- Transform urban tourism destinations into a Smart Tourism Destination (STD) by implementing IoT and regional DMSs
- Implement the use of the Destination Management Systems (DMSs) by destinations and enterprises in all its functionalities
- Develop management and collaboration system of all partners involved in the tourism industry at the DMOs level, in other words a CRM tool
- Accelerate the and adapt destination offer and business models in partnership with all the actors, especially SMEs in green/digital efforts
- Support digital twins available for a destination in each country in 2025
- Promote the use of IoT technology to provide information to tourists
- Active involvement in the preparation and promotion of matchmaking events: provision of proper venues, co-organisation of the events in co-operation with local and / or national stakeholders, involvement in promotion campaigns etc.
- Coordinate actions locally, making the industry and stakeholders work together to achieve digitalisation targets

- Develop a new network of Digital Tourism Offices with physical and virtual spaces for cities
- Actively promote enhanced natural heritage experiences for visitors, including 3D modelling and/or 360° visits

### **Tourism industry**

- Support chambers that apply their expertise towards the consecution of these objectives, through workshops, VET, and training courses, and supporting the digital upskilling of SMEs
- Tourism sector must provide destinations with intelligence, through the incorporation and integration of new technologies and advances in ICT
- Multinational tech companies to support digital transformation information, e.g. cycle paths Google
- Develop a tourism/mobility dataspace (eg. Amadeus and other travel stakeholders)
- Develop a sectorial dataspace to allow industry stakeholders to share data and reduce friction during the customer journey.
- Develop and improve data analytics competences on all levels
- Support SMEs with easy access and competences to use data for business and end-consumer experience creation and management
- Develop sector specific data hubs
- Develop and follow a code of conduct for data sharing initiatives to encompass all economic operators in the tourism sector, incl. digital players such as search engines and mapping platforms, social media networks, travel intermediaries, transport, accommodation and service providers (etc.)
- contribute to rule setting by platform economy associations
- Provide information and data to relevant institutions, take up responsibilities as employers of digital platforms
- Support SMEs with financial and organisational support for training and education on digitalisation
- Participate in training and invite staff to do the same

## **3.4 Would you have any input for assessing the costs and benefits for reaching these scenarios?**

Some stakeholders offered indications of potential costs and benefits that may result from the transition towards digital tourism. These costs and benefits have been divided into the four categories defined below, to illustrate the barriers or opportunities that they encounter. The suggestions are individual and context-specific so do not represent all issues or types of organisations, but aid in understanding the challenges and benefits that may be faced. These categories been developed through an examination of common costs and barriers across the green, resilient, digital areas and offer an integration as follows:

- **Behavioural.** Current attitudes and behaviours in organisations and society that can constrain or boost the achievement of a specific goal. This includes risk aversion to change/ willingness to innovate, and the lack (or existence) of organisational structures to address such goal.
- **Knowledge.** Lack (or existence) of knowledge and skills on the impacts of tourism, and the actions that can be taken to address such impacts. Either at individual, organisational or destination level.
- **Structural.** Lack (or existence) of suppliers, products and services, including technological innovations, that can constrain or boost the achievement of a specific goal.
- **Financial.** Lack (or existence) financial incentives to adopt a behaviour change, including potential earnings or savings from market access or operational costs.

#### **Examples of costs or constraints for Digital tourism:**

- Businesses / organisations: Individual mindset of SMEs and resistance to the adoption of new technologies (B)
- Businesses / organisations: Unclear coordination and remuneration for data sharing across levels (B)
- Businesses / organisations: Lack of technical knowhow and data competence on SMEs level (K)
- Businesses / organisations: Lack of internal processes and lack of incentives for innovation (S / B)
- Network of Organisations – Create platforms for sharing best practices and pilot destinations for data hubs and smart tourism destinations (S / F)
- Academic/Research Institution – Funding schemes for digitalisation and support of SMEs (F)
- Businesses / organisations: Access to non-bureaucratic funding for accessible training and day-to-day digitalisation efforts (K / F)
- National level: Coordination of data harmonisation and methodologies across Europe standards and to/from national, regional and destinations levels (S / F)

#### **Examples enablers or benefits for Digital tourism:**

- Academic/Research Institution – Defined curricula for digital literacy and digital tourism education (K)
- Network of Organisations – Standards for data analytics to support and coordinate data hubs (K / S)
- Businesses / organisations: Clear regulations and protection of working conditions of employees of platform economy (S)
- Individual: Clear information and awareness about sustainable choices easily accessible through digital tools for end-users (K)
- Destination: Accessibility to digital and virtual content for people with disabilities and with reduced mobility (S)

### **3.5 What would be the concrete action(s) your organisation would be willing to (co-)implement towards reaching these scenarios?**

The actions recommended by the survey respondents were more general than concrete. These actions did not lend themselves to attributing potential financial or human resources required to achieve them at this point. They however provide a starting point for the Commission to engage with stakeholders based on this initial understanding of expectations. Other concrete actions essentially related to the very specific area of expertise that the respondent wanted support on, for what is their core business model.

**Responses are structured by stakeholder type.**

#### **National Administrations:**

- Develop a new website and a platform to reach these scenarios
- Develop a data hub for the tourism sector
- Cooperate with Ministry of Digital Governance for the adoption of referred scenarios in State digital reforms strategy and structures
- Participate in fora, decision groups for cultural tourism and digitalization

#### **Regional Administrations:**

- Provide tourists and citizens with a smart destination digital platform
- Establish a statistical information system guaranteeing the reliability of data obtained and their permanent updating
- Analyse the current and future situation of the national and international inbound markets, trends in consumption among tourists, their technological, social, environmental or other needs
- Use a single Destination Management System at regional level that can be interoperable with similar instruments at national and European level
- Develop a pilot action on different digitalisation tools (IA, VR, AR, Big Data Analysis)
- Transition from a tourist office to a Destination Management Organization

#### **Local Administrations:**

- Develop Digital Competencies and Skills
- Apply for EU funds to implement smart solutions, such as Smart City, Smart City
- Collaborate as a pilot destination for the testing of technologies and implementation of the digitisation systems.



- Develop a complex and complete common digital system to create a network among all tourist organisations (public and private) operating at regional level to detect and monitor tourist flows in real time
- Create a regional management system for data and tourist info to be provided
- Simplify the reservation system for cultural and artistic sites
- Work with Open Data projects
- Participate in an Open Data Hackathons

#### **Destination Management Organisations:**

- Invest in staff with specialised digital competences

#### **International Organisations**

- *No responses from the survey*

#### **Networks of Organisations:**

- Coordinate cooperation projects' focusing on up/re-skilling tourism workers with a focus on innovation and digitalisation
- Contribute to the implementation of the key actions identified that concern mainly regional authorities and their interactions

#### **Business Associations:**

- Support its members in the digital implementation
- Run a digital database
- Offer and support professional qualification, dual training/study, sponsoring professorships, exhibition internal training programmes
- Chamber - reach out to SMEs through workshops, participation to VET, and training courses, and supporting the digital upskilling of SMEs
- Develop certification paths for relevant skills
- Develop collaborative forums/working groups that strengthen the links between companies in the sector, mainly SMEs, facilitating institutions and entrepreneurial technology partners
- Conduct research is carried out on certain specific topics of interest, such as impact/ assessment / diagnostic reports.
- Raise awareness and therefore provide training and information to improve communication with large, medium, and small companies
- Gather the needs of the different sectors and we can ensure that the entire value chain participates in the initiatives that are developed

#### **Trade Union:**

- Help in regulation of digital platforms providing services

- Support all workers, and those who work through digital platforms, have rights to decent working conditions, decent wages, social security, health and safety protection, collective bargaining, information and consultation
- Address new technologies and digitalisation in the sectoral social dialogue

#### **Company / Business Organisations:**

- Regulation of digital platforms providing services
- Implement the actions of developing the standards for data analytics in tourism
- Form requirements for data stewards and channels for data exchange
- Raise awareness about the importance of correctly managing and using data in tourism through our network
- Organise workshops and prepare a toolkit
- Exploit data to achieve knowledge about the number of passengers using the airport to offer a personalized experience
- Automate airport management processes and evolve towards a service model

#### **Consumer Organisations:**

- Use real time information for route planning
- Non-governmental organisation:
- Support the collection and sharing of relevant data related to cycle tourism
- Assist the ecotourism destination in improving marketing and networking using digital tools
- Promote among greenways stakeholders the interest in having monitoring system, which can be exchanged, allow comparison and see trends
- Encourage the digitisation on greenways (itineraries and SMEs & micro-companies)
- Support the actual digitisation of the greenways ecosystem and SMEs
- Realise regional policies, consultation, implementation, monitoring

#### **Academic / Research institutions:**

- Run a centre for big data research, including big data ethics
- Offer the educational, research, prototype, consulting services for digitalisation
- Contribute to open data aspects
- Assist in call repositioning

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**WE THANK YOU FOR YOUR SUPPORT IN OUR EFFORTS TO  
CONTRIBUTE TO THE CO-CREATION OF THE TRANSITION  
PATHWAY FOR TOURISM, FOR A MORE SUSTAINABLE,  
INNOVATIVE AND RESILIENT TOURISM ECOSYSTEM.**

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