

SUSTAINABLE EU TOURISM

Shaping the Tourism of Tomorrow

Presentation of survey results

October 2024

Project overview

**SUSTAINABLE
EU TOURISM**



Shaping the Tourism of Tomorrow

Project objectives



Facilitate change towards more **sustainable** and **resilient** tourism destinations, aligned with the EU's **Transition Pathway for Tourism**

Project duration: December 2023 – November 2025

Scope: Destination Management Organisations (DMO) in NUTS 2 (basic regions) and NUTS 3 (small regions) or lower

Specific objectives



Recognise **key challenges** and gather **best practices** for sustainable and resilient tourism with focus on local communities throughout the EU

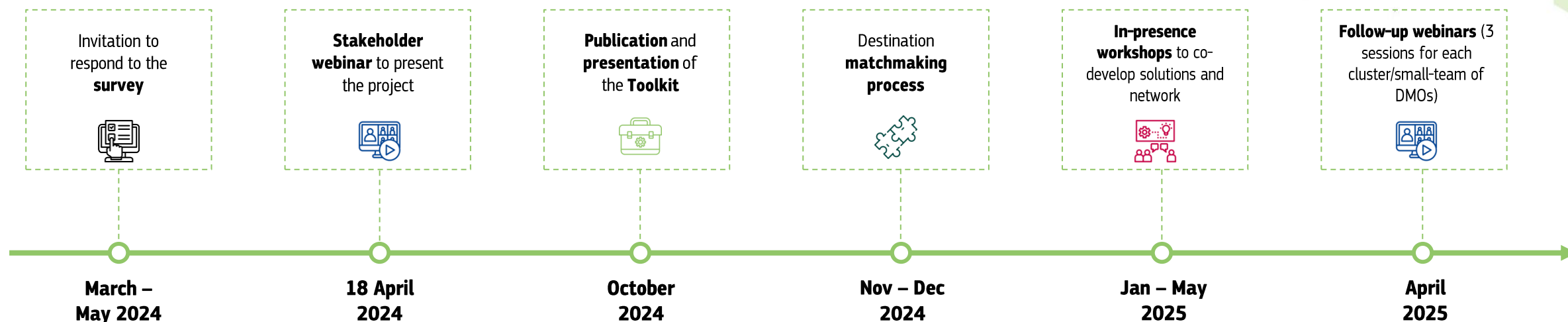


Establish **collaborations** between destinations with common challenges

Destinations' journey

DMOs' path towards sustainability & resilience

Key activities in which DMOs will be involved



Communication activities for DMOs

- Presentation of key messages to DMOs (in 22 EU languages)
- Communication kit for DMOs
- Closing activities (feedback on collaboration activities, lessons learnt and guidance for DMOs)

Legend



DMO Survey



Webinar



Toolkit



Peer learning and matchmaking



Workshop

Survey for local and regional DMOs

**SUSTAINABLE
EU TOURISM**



Shaping the Tourism of Tomorrow

Scope and objectives



Assess the destination's state of the art regarding **sustainable and resilient tourism**, while determining their interest in participating in the project activities

Specific objectives



Identify the **involved DMOs' key challenges** and **best practices** for sustainable and resilient tourism



Gather DMOs' expressions of interest to **participate in the project activities**



Identify **sustainability** and **resilience experts** who could register to the **TAIEX expert database**

Structure of the survey

Section 1 – Introduction & General Information

- Contact details
- Tourism in the destination
- Governance

Section 2 – Challenges & Opportunities

- Sensitivity to changes
- Tourism impact
- Emerging trends and developments

Section 3 – Solutions

- Measures implemented
- Success factors and challenges in implementation
- Measures planned or ongoing

Section 4 – Participation in the project

- Participation in project activities
- Tourism impact to be addressed in the project
- Expert to involve in the project

SURVEY CHARACTERISTICS

- ✓ **22 EU languages**
- ✓ Accessible on EU Survey
- ✓ Open from **March to May 2024**

SUPPORTING MATERIALS

- ✓ **Invitation letter** by the European Commission
- ✓ **Guide for DMOs** with
 - project presentation
 - FAQ & helpdesk

Survey results

Tourism in the destination & DMO governance

General information

222 valid replies collected

Country coverage

- **27 EU Member States**, including 1 European grouping of territorial cooperation (**ZASNET**)
- **1 candidate country** (Montenegro)

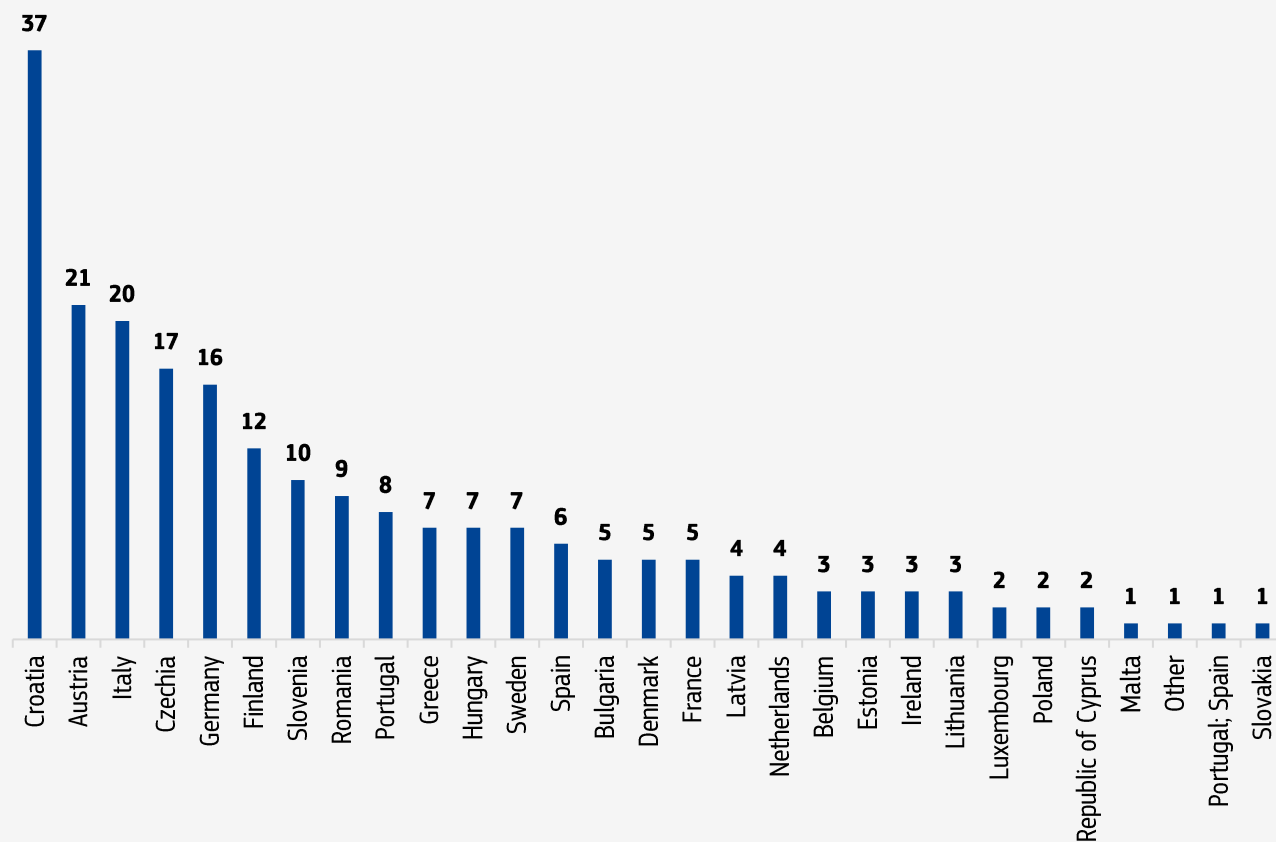
DMO dimension

- 86% with less than 800.000 inhabitants
- 58% less than 150.000
- 38% less than 50.000

Type of DMOs

- 32% rural or natural
- 26% coastal
- 17% urban
- 13% mixed
- 12% mountain

Distribution of responses by country



Tourism in the destination

Tourism contribution to the economy

Main results

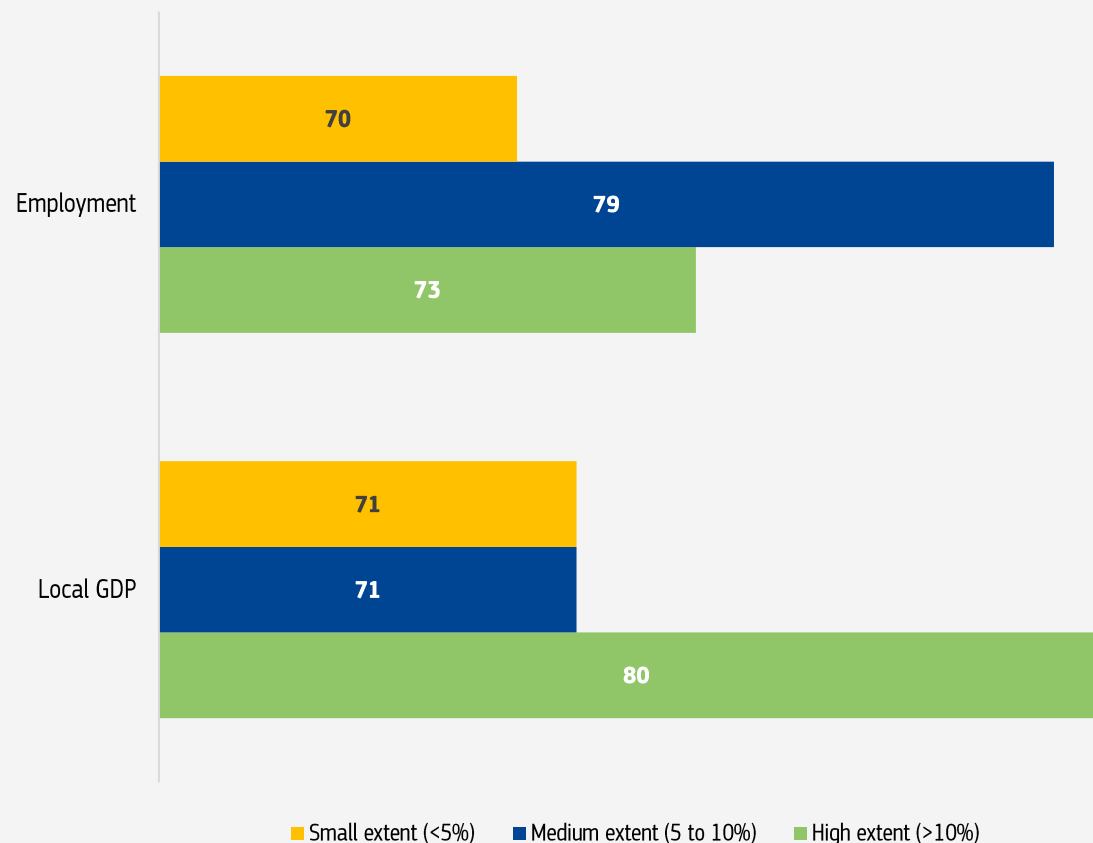
Tourism contribution to the economy

- **33%** consider that the impact of the tourism industry is higher than **10% of total GDP**.
- For **costal and mountain** destinations: almost **60%** declared that tourism contributes to a high extent to their local economy

Response distribution

- Almost **50% highly dependent** on their 3 most significant international source markets
- **81%** declared a **medium** or **high level of seasonality** (higher incidence for coastal and mountain destinations)

Tourism contribution to destination economy (No. of DMOs)



Tourism in the destination

Quality of tourism offer

Main results

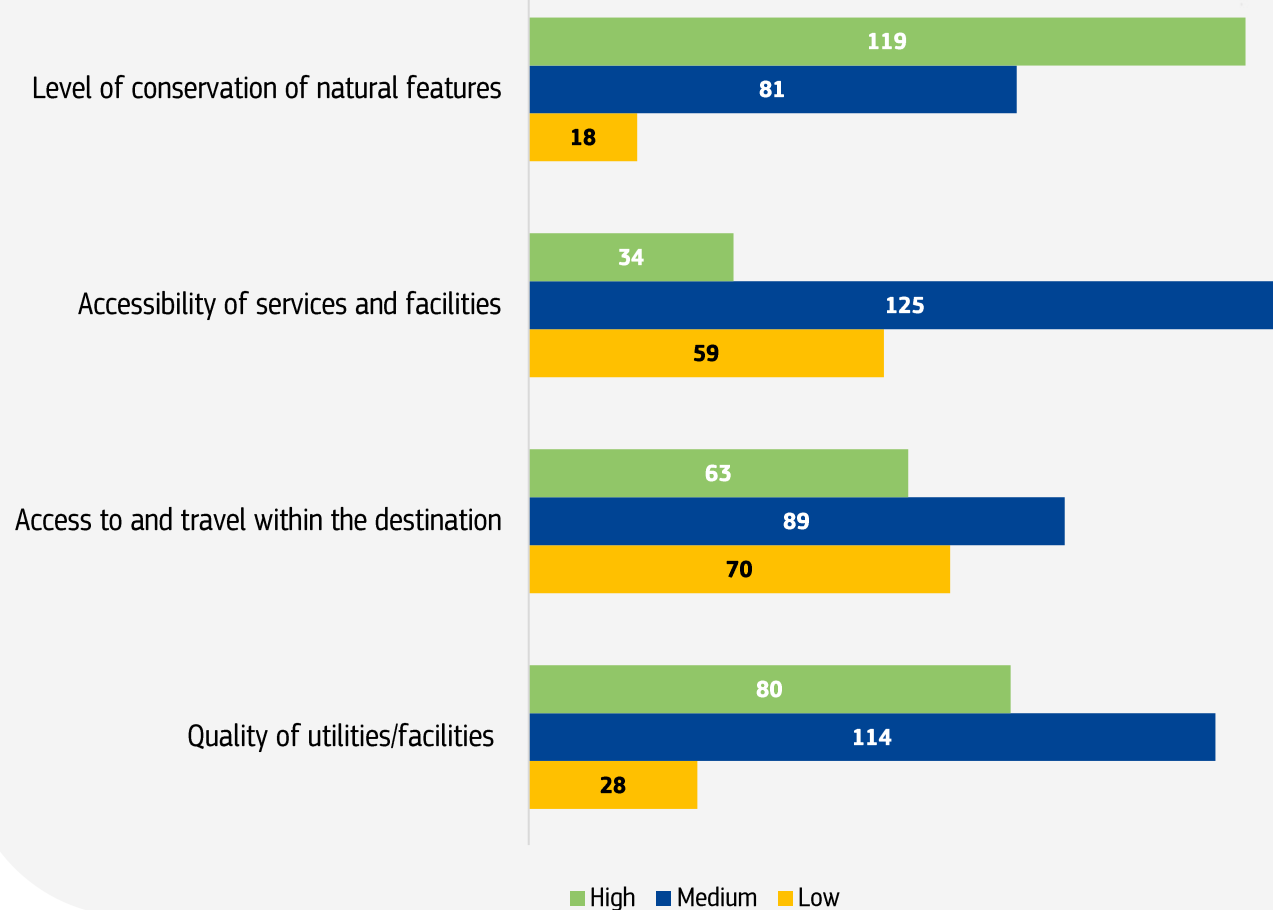
Quality of tourism offer

- **Most respondents** prioritise preserving natural features (natural landscapes, protected areas).
- Majority provides **medium levels of quality of tourism offer** (i.e. accessibility of services and facilities, access to and within the destination, utilities and facilities).

Response distribution

- **Urban** and **mountain** destinations prioritise investing in quality of utilities/facilities.
- **Nature and rural** face difficulties in investing in infrastructure improvements without negatively impacting the environment.

Quality of tourism offer



Tourism in the destination

Seasonality by destination type

Main results

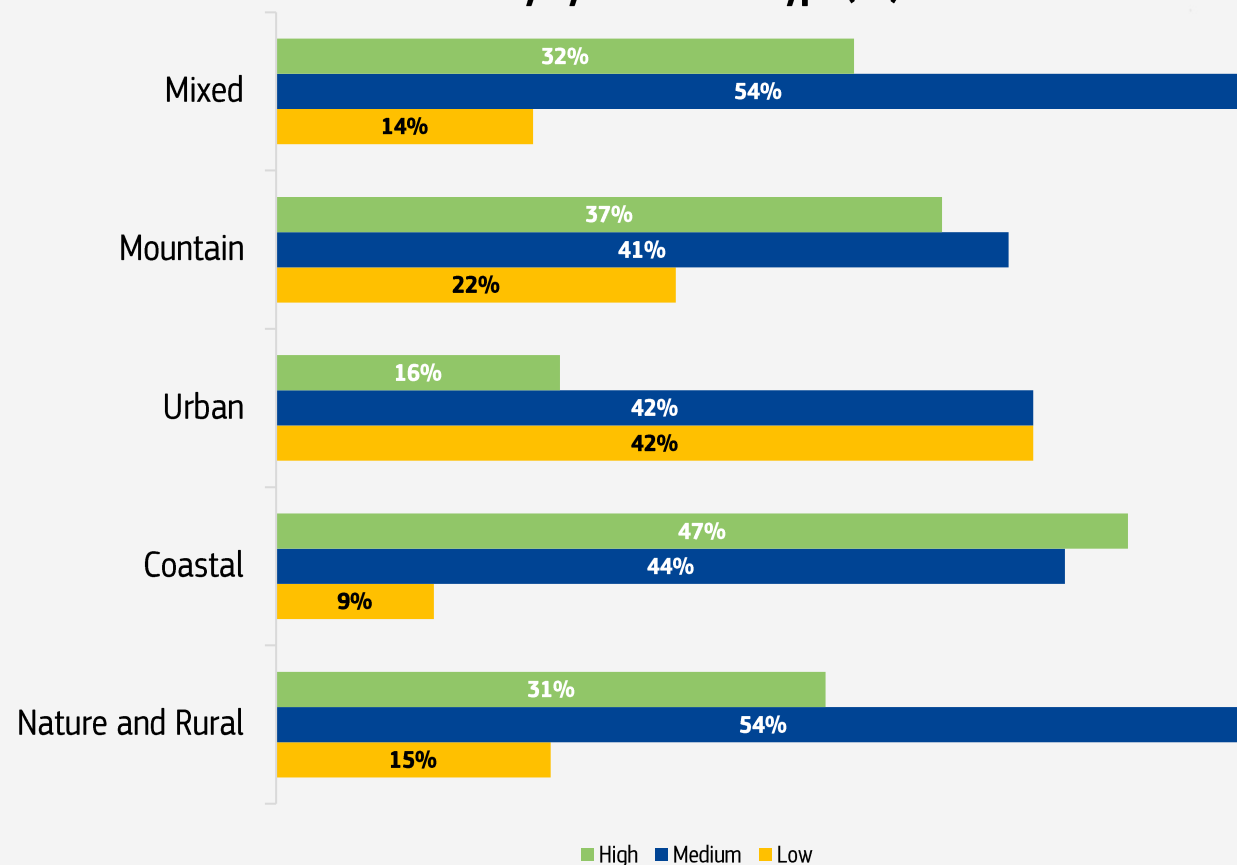
Seasonality by destination type

- **Coastal & mountain** destinations record highest incidence of seasonality (e.g. outdoor activities dependent on weather conditions)
- **Urban DMOs** least affected by seasonality (42%)

Diversification of tourism offer

- Seasonality can be countered by **diversifying tourism offer**, attracting different types of tourists throughout the year
- Evidence collected from survey respondents highlights that **diversification might not be enough**, as seasonality is also related to demand side

Seasonality by destination type (%)



DMO governance

DMO key roles

Main results

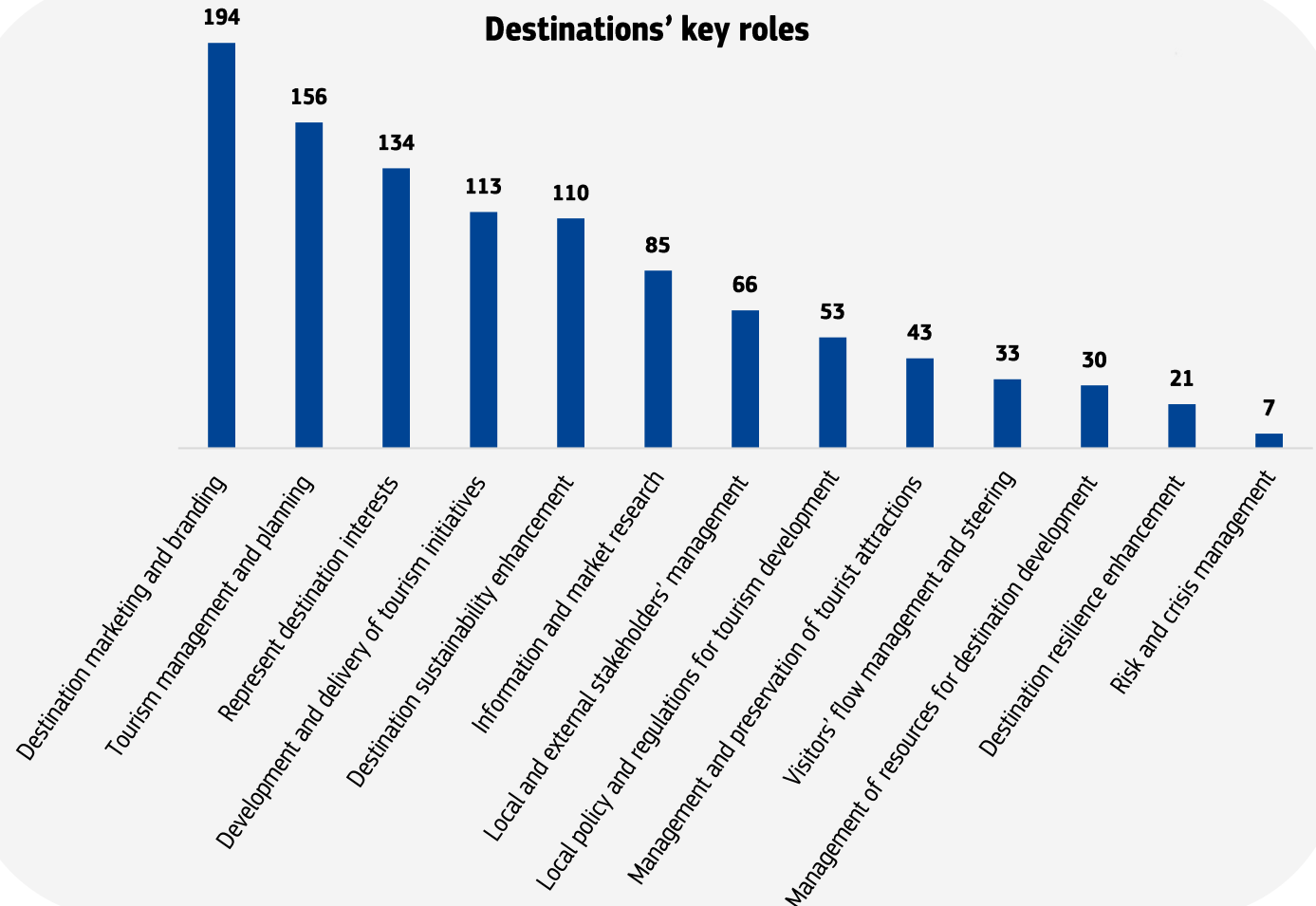
Key roles of organisation

- **Marketing and branding** (87% of respondents), followed by tourism management and planning (70%), representing the destination's interests (60%), and developing and delivering tourism initiatives and products (51%)

Areas for improvement

Majority of DMOs do not:

- prioritise **visitor flows**;
- consider having **risk and crisis management plans** as an asset for building resilience, minimising disruptions, and facilitating recovery.



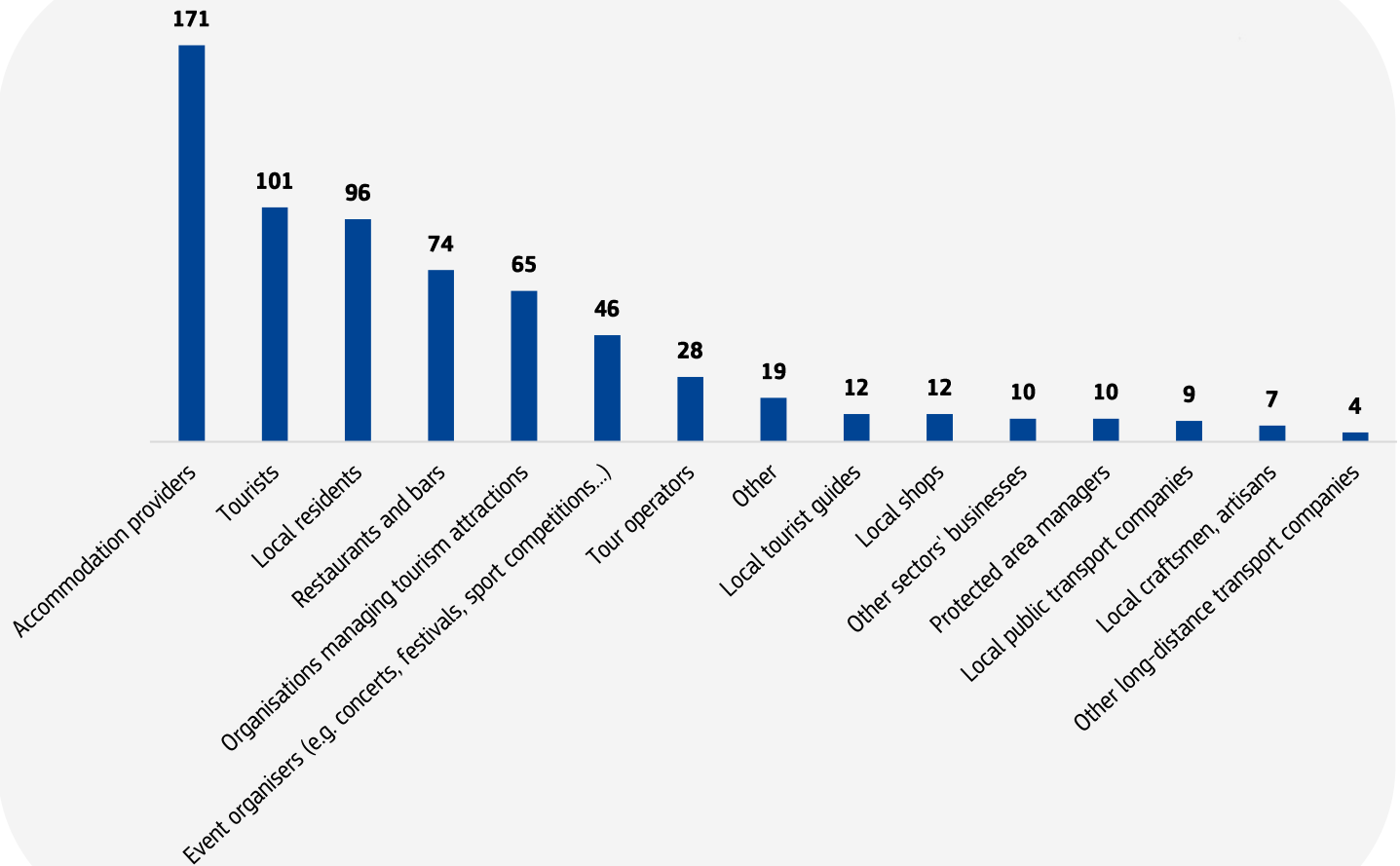
DMO governance

DMO main stakeholders

Main results

Key stakeholders

- **Accommodation providers** deemed most important stakeholders, followed by **tourists** and **local residents**,
- **Restaurants & bars** considered key forces for driving local economy and attracting tourists
- 'Other' category = **local municipalities and administrations** (crucial role in enhancing local tourism activities)



DMO governance

Stakeholder relevance per destination size

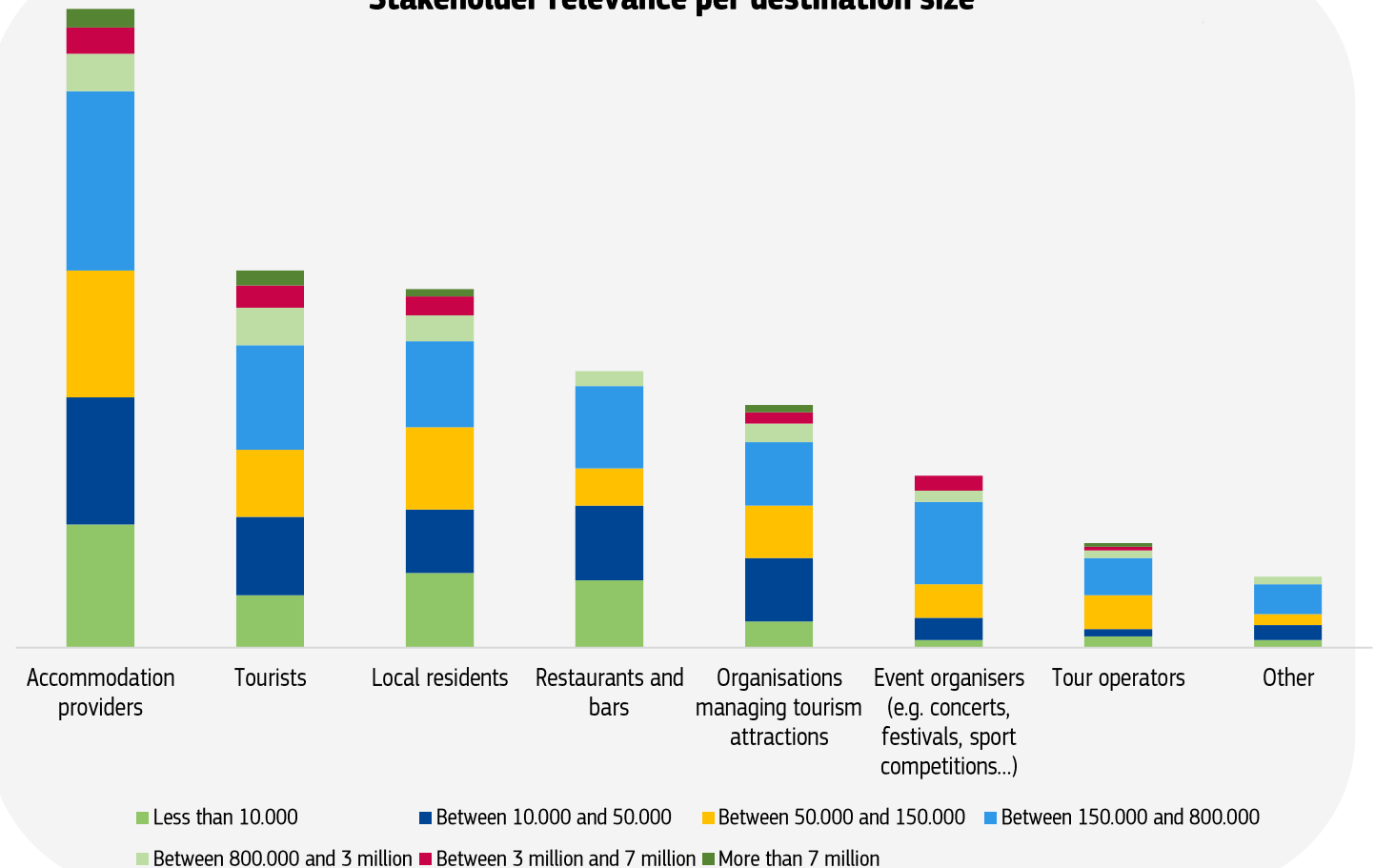
Main results

Key stakeholders

- **For NUTS 3 level or lower***: accommodation providers, followed by tourists, local residents, restaurants & bars.
- **Larger destinations**: stakeholder relevance more evenly distributed.

* NUTS 3 level destinations: 150.000 to 800.000 inhabitants
Less-than NUTS 3 level: < 150.000 inhabitants

Stakeholder relevance per destination size



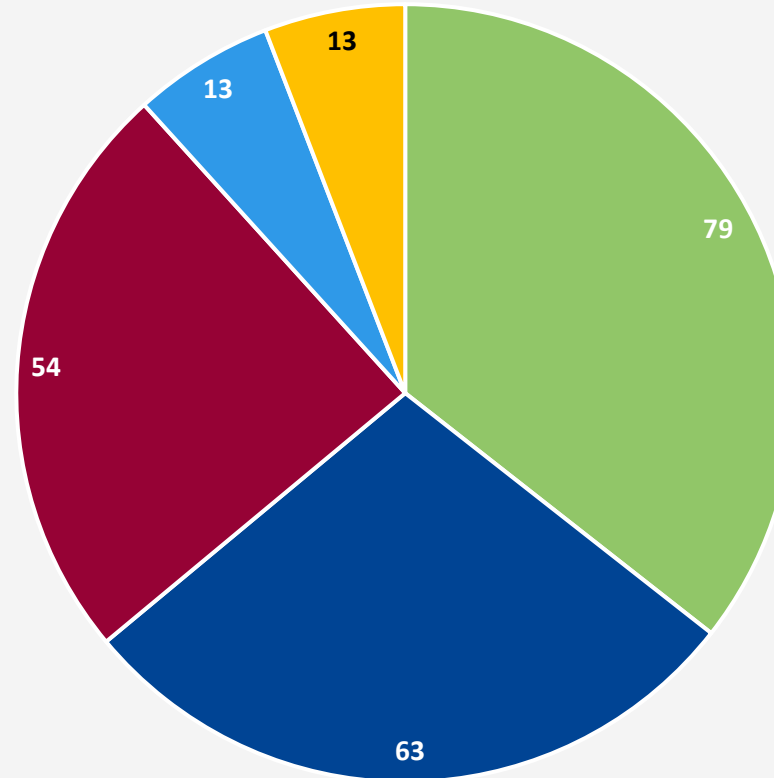
DMO governance

DMO relationship with key stakeholders

Main results

Relationship with key stakeholders

- **90%** of DMOs use **stakeholder engagement mechanisms** (workshops/seminars for SMEs, co-developed sustainable tourism plans & strategies, citizens/stakeholder meetings etc.)



- Stakeholders collaborate with the DMO (through a structured mechanism)
- Stakeholders are regularly consulted (at least once per year)
- Stakeholders are part of the DMO
- Occasional consultations (not every year) on key issues
- None of the above

Survey results

Challenges & opportunities

Challenges and opportunities

Tourism positive impacts

Main results

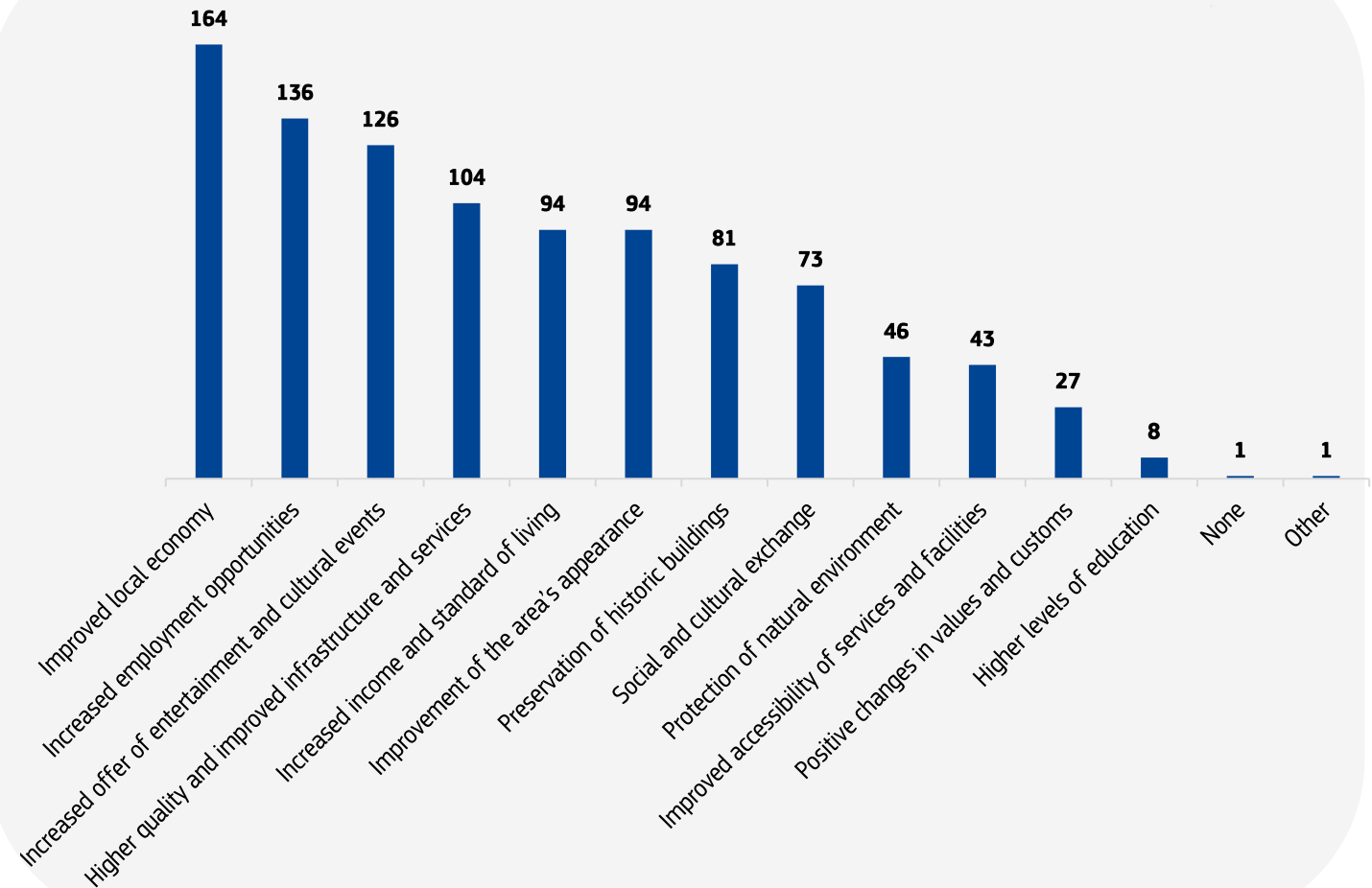
Positive impacts

- **Most positive impacts** on economic sphere (50%), followed by sociocultural (36%) and environmental (14%)
- **Most common positive impacts:** improved local economy, increased employment opportunities, bigger offer of entertainment and cultural events

Correlation between DMO type, size & impacts

- **Mountain destinations** generally benefit from higher quality and improved infrastructure and services
- **Larger destinations** experience improved local economy, increased employment opportunities, preservation of historic buildings, and increased offer of cultural events

Tourism positive impacts



Challenges and opportunities

Tourism negative impacts

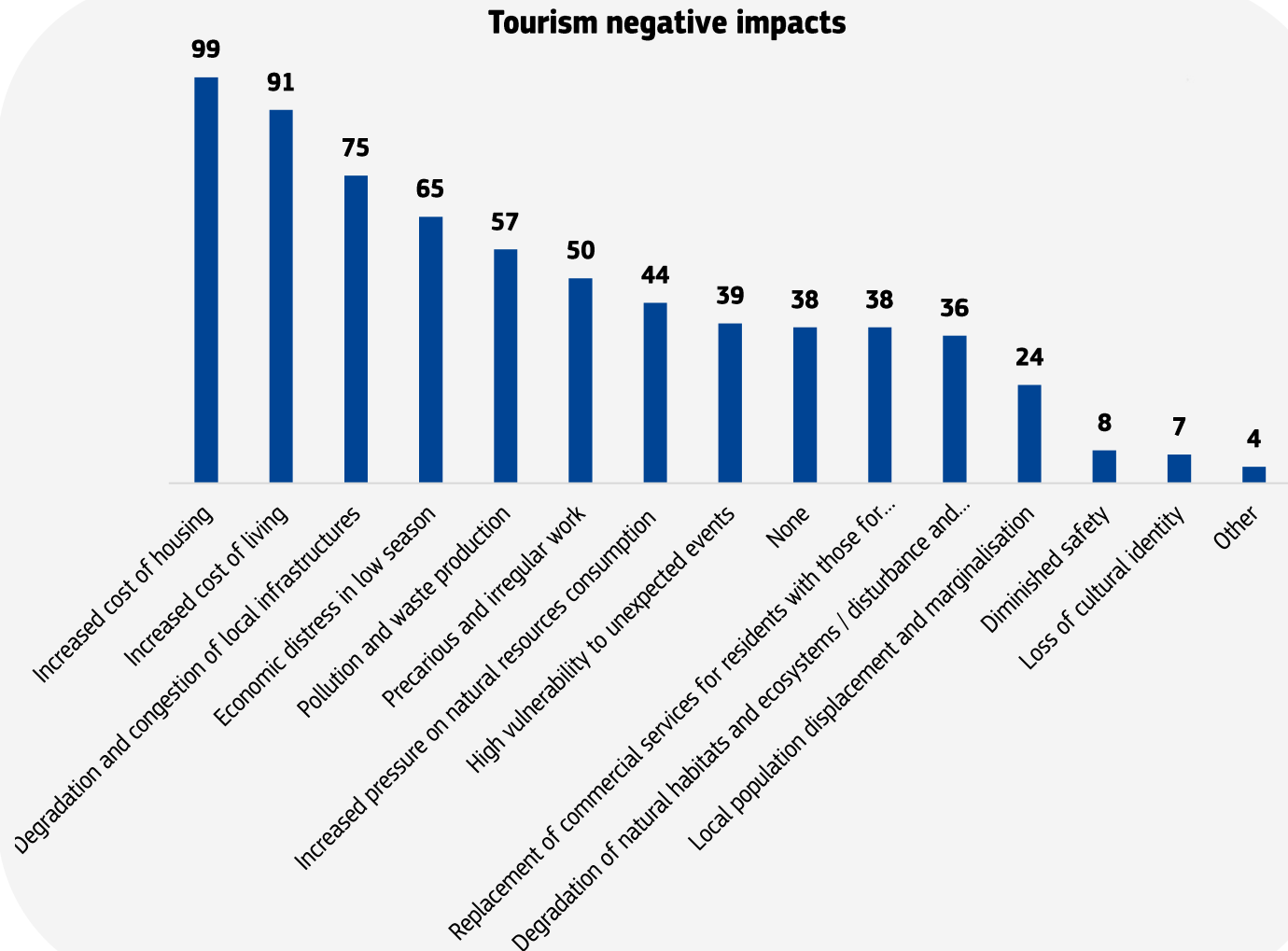
Main results

Negative impacts

- **Most negative impacts** on economic sphere (64% of respondents), followed by environmental (30%). Sociocultural only 6%.
- **Most common negative impacts:** increased cost of housing and living, degradation and congestion, economic distress in low season, precarious and irregular work.

Correlation between DMO type, size & impacts

- **Mountain destinations** most exposed to inflation problems and tourism pressure
- **Coastal destinations** heavily endangered by tourism seasonality
- **Urban destinations** experience high levels of 'touristification' of services
- **Large destinations** suffer most from increased costs of housing



Survey results

Solutions

Solutions

Measures to improve the destinations' sustainability and resilience



Main results

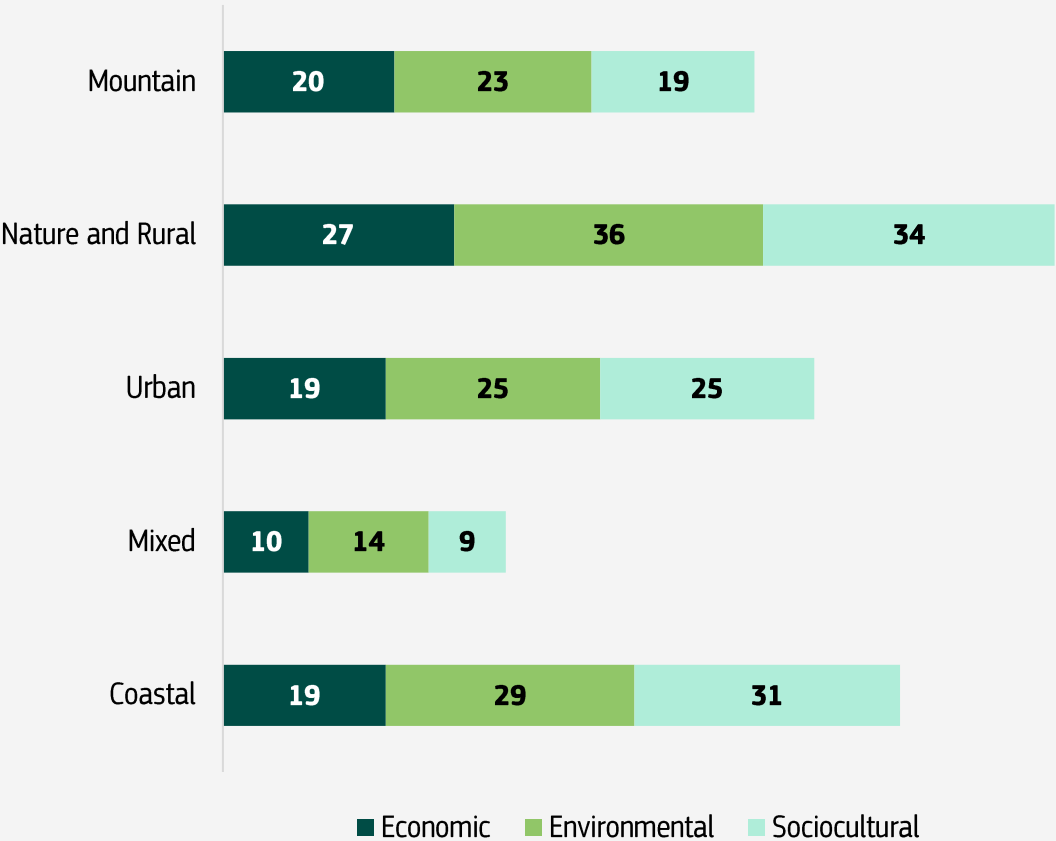
Measures

- **66%** of respondents (146), most of them natural & rural DMOs, carried out some measures
- **Measures implemented** mainly cover environmental aspects (87%), followed by sociocultural (81%) and economic (65%)

Solutions by destination type

- **Nature and rural destinations:** preserve cultural and natural sites, support local economies, and enhance sustainability
- **Coastal destinations:** also invest in eco-friendly infrastructures and promote off-season tourism
- **Urban destination:** mostly marketing activities

Measures per destination type



Solutions

Environmental measures

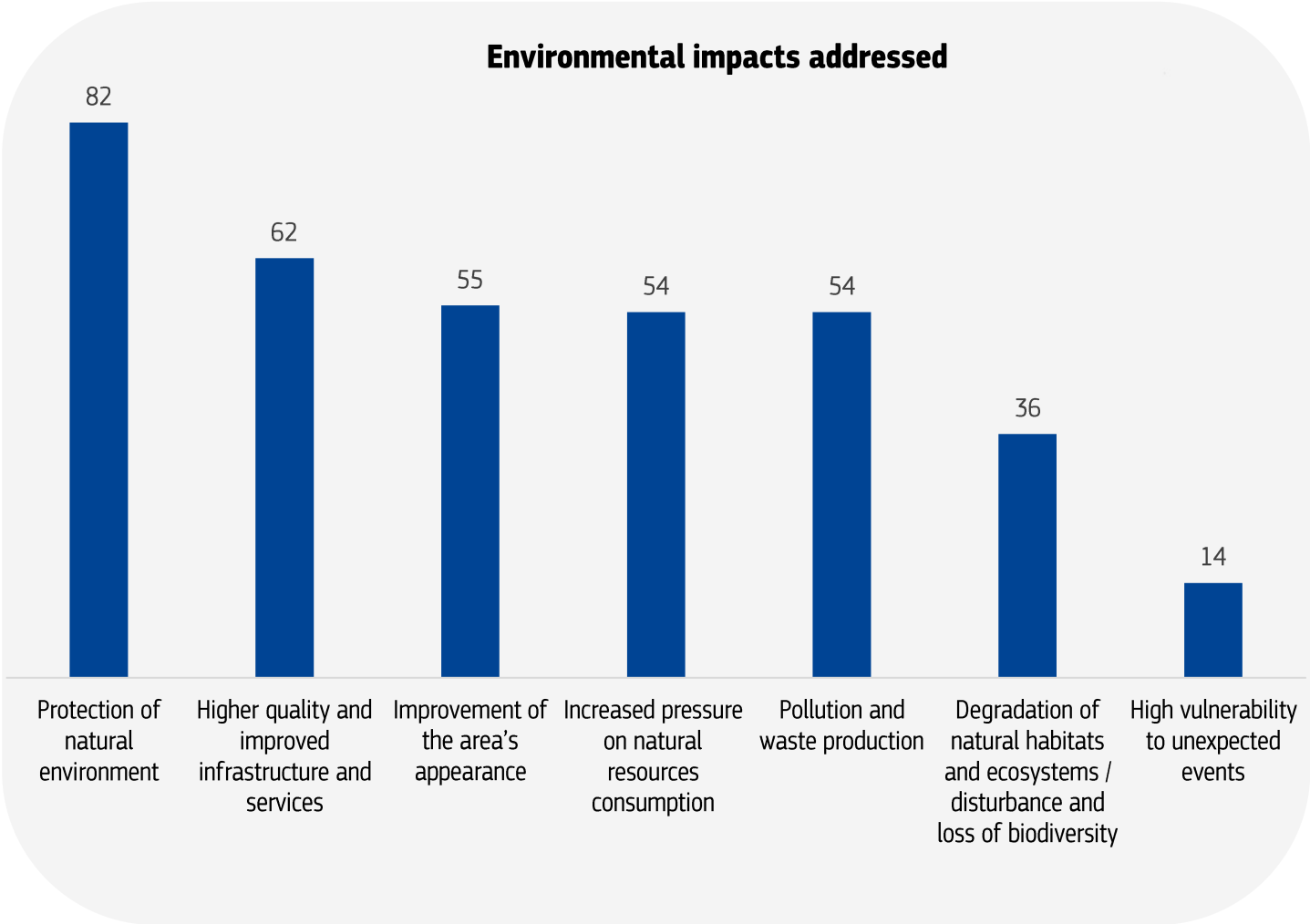


Main results

Solutions adopted

- Free local transportation services
- Decentralisation of tourism to countryside areas
- Organisation of zero-waste initiatives
- Coaching activities on sustainable tourism
- Sustainability-related certifications

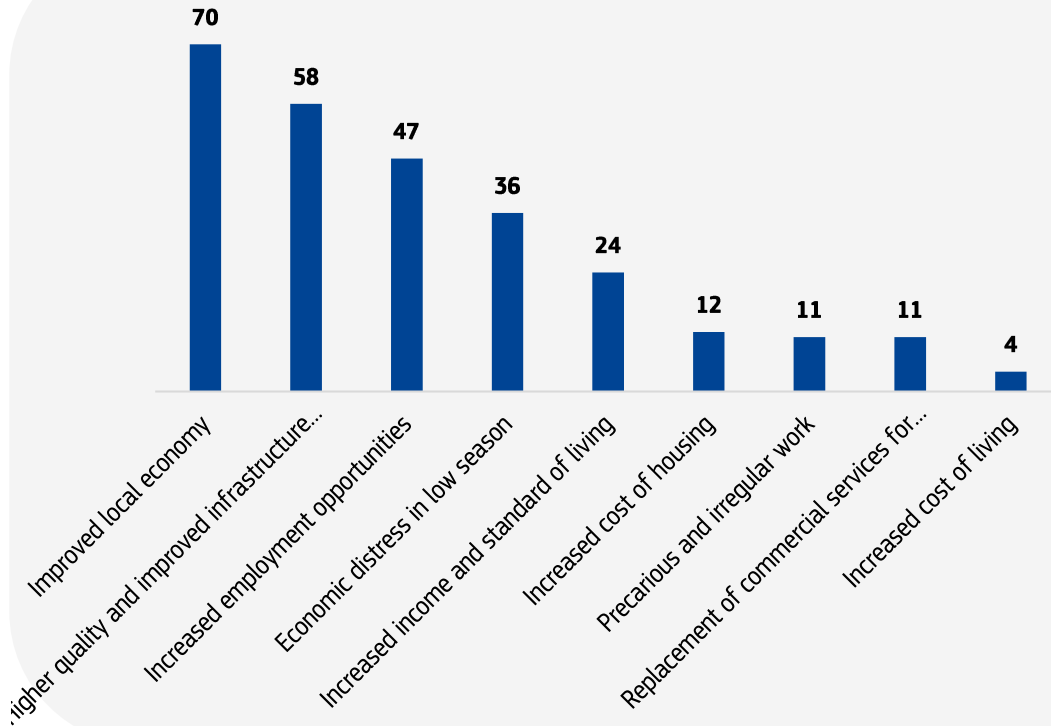
Environmental impacts addressed



Solutions

Economic and Sociocultural measures

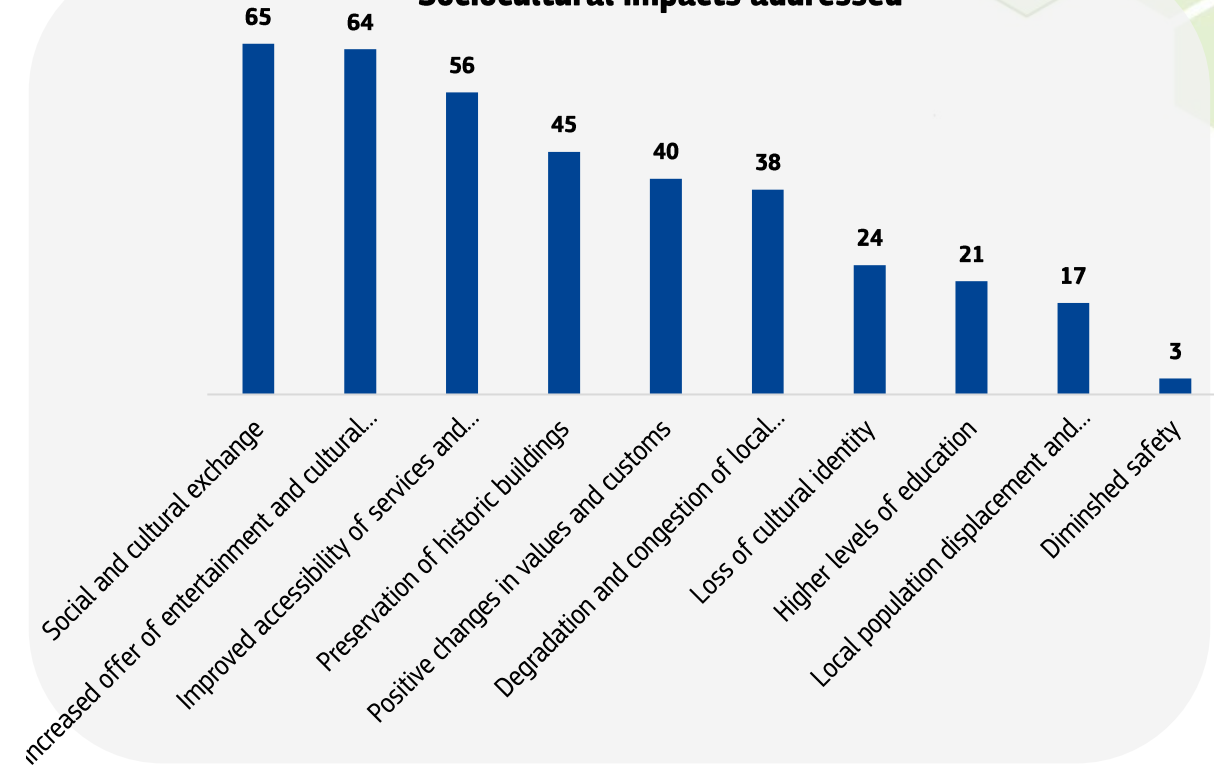
Economic impacts addressed



Solutions adopted

- Investments in DMO's infrastructures
- Data analysis mechanisms
- Collaborations with local authorities and MICE industry
- Sustainable certifications for local businesses

Sociocultural impacts addressed



Solutions adopted

- Renovation of cultural and tourist sites
- Organisation of local festivals, conference events, workshops, seminars
- Removal of social and physical barriers
- School/university programmes for spreading knowledge about responsible tourism

Solutions

Funding schemes adopted for the measures implemented

Main results

Funding of measures

- 68 DMOs** used EU or national funding instruments
- 28 DMOs made use of **EU funding** exclusively
 - 11 DMOs used **national** funding
 - 10 DMOs relied on **both types**
 - 19 DMOs did not share specific information concerning the adopted scheme

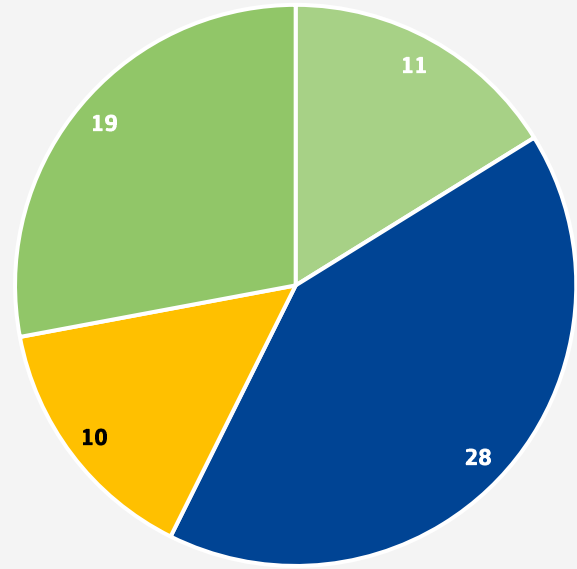
EU funding instruments

European Regional Development Fund (**ERDF**) mentioned **19 times**

Other sources:

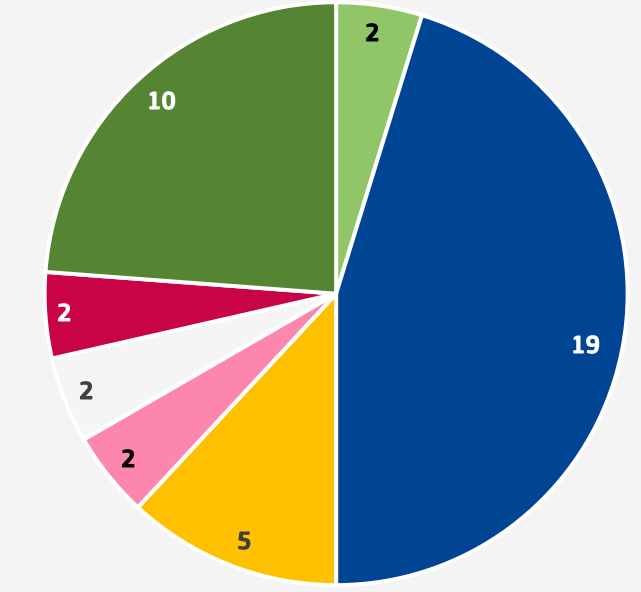
- Programme for the Environment and Climate Action (**LIFE**)
- European Agricultural Fund for Rural Development (**EAFRD**)
- Research & Innovation (**Horizon**)
- Technical Support Instrument (**TSI**)

Type of funding instruments
(No. of DMOs)



■ National funding ■ EU Funding
■ Both ■ Not specified

EU funding instruments used



■ Environment & Climate Action "LIFE" ■ ERDF
■ NGEU (Next Generation Eu) ■ EAFRD
■ Horizon ■ TSI
■ Other

Solutions

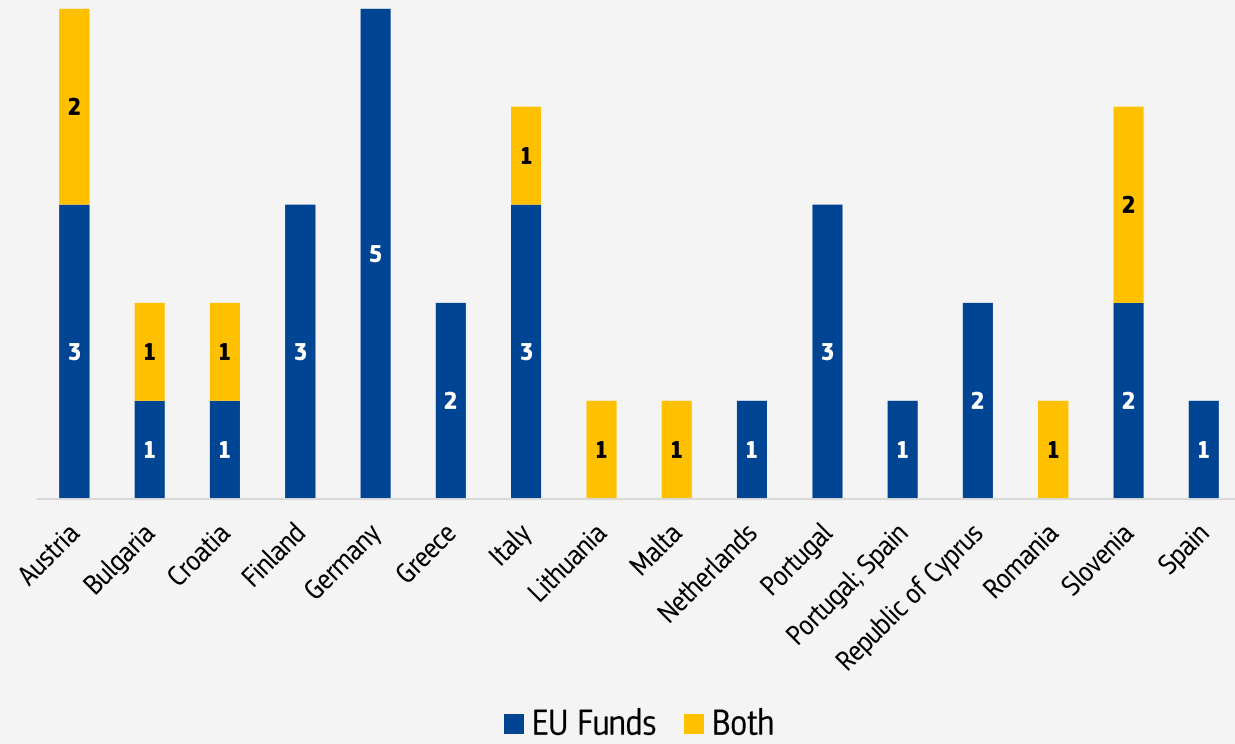
Funding schemes – Country distribution

Main results

Funding measures

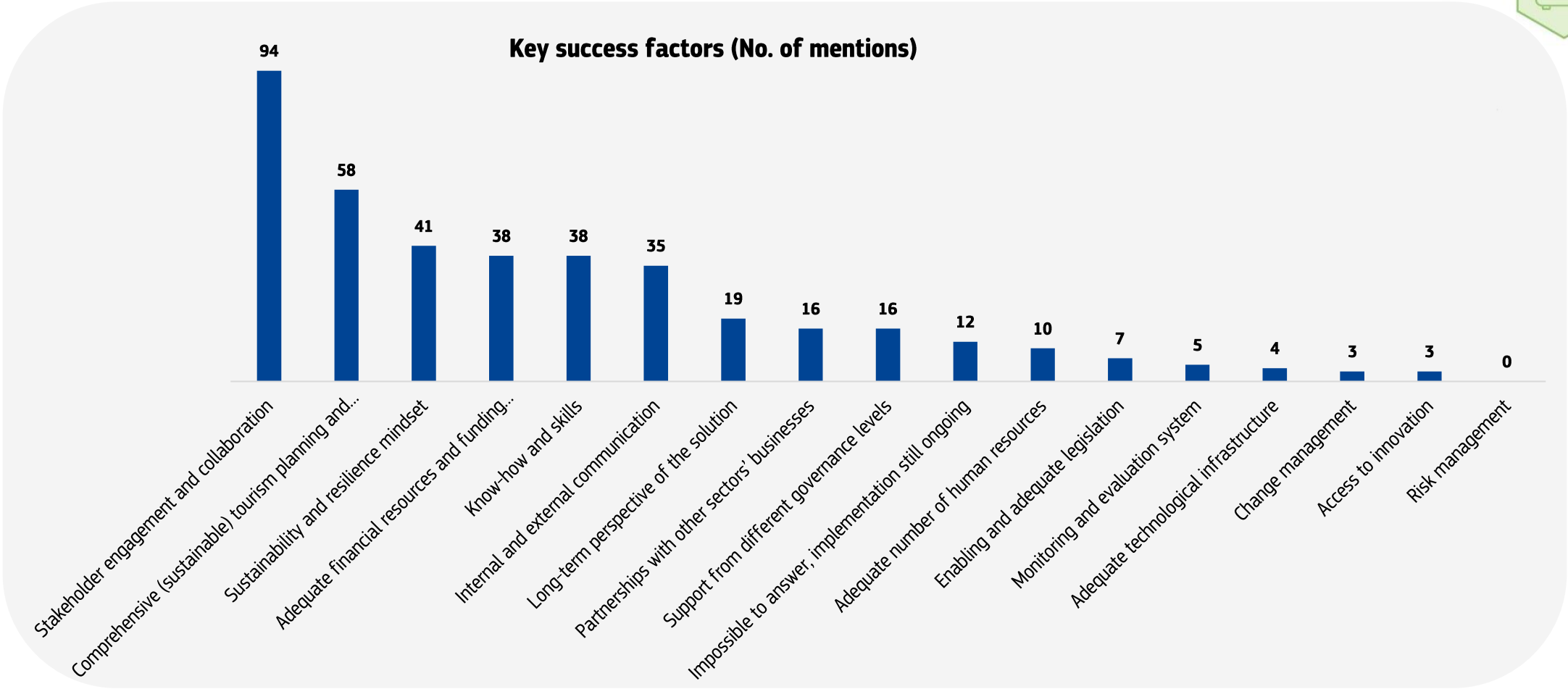
- **5 German DMOs** declared using EU-level funding (especially ERDF and EAFRD)
- **3 DMOs** for **Finland, Portugal, Italy** (each)
- **5 Austrian DMOs** used both EU and national funding (mainly LEADER funding scheme)

Type of funding used by country (No. of DMOs)



Solutions

Key success factors to implement measures proposed



Main evidence

Risk management does not represent a key success factor (potential room for improvement)

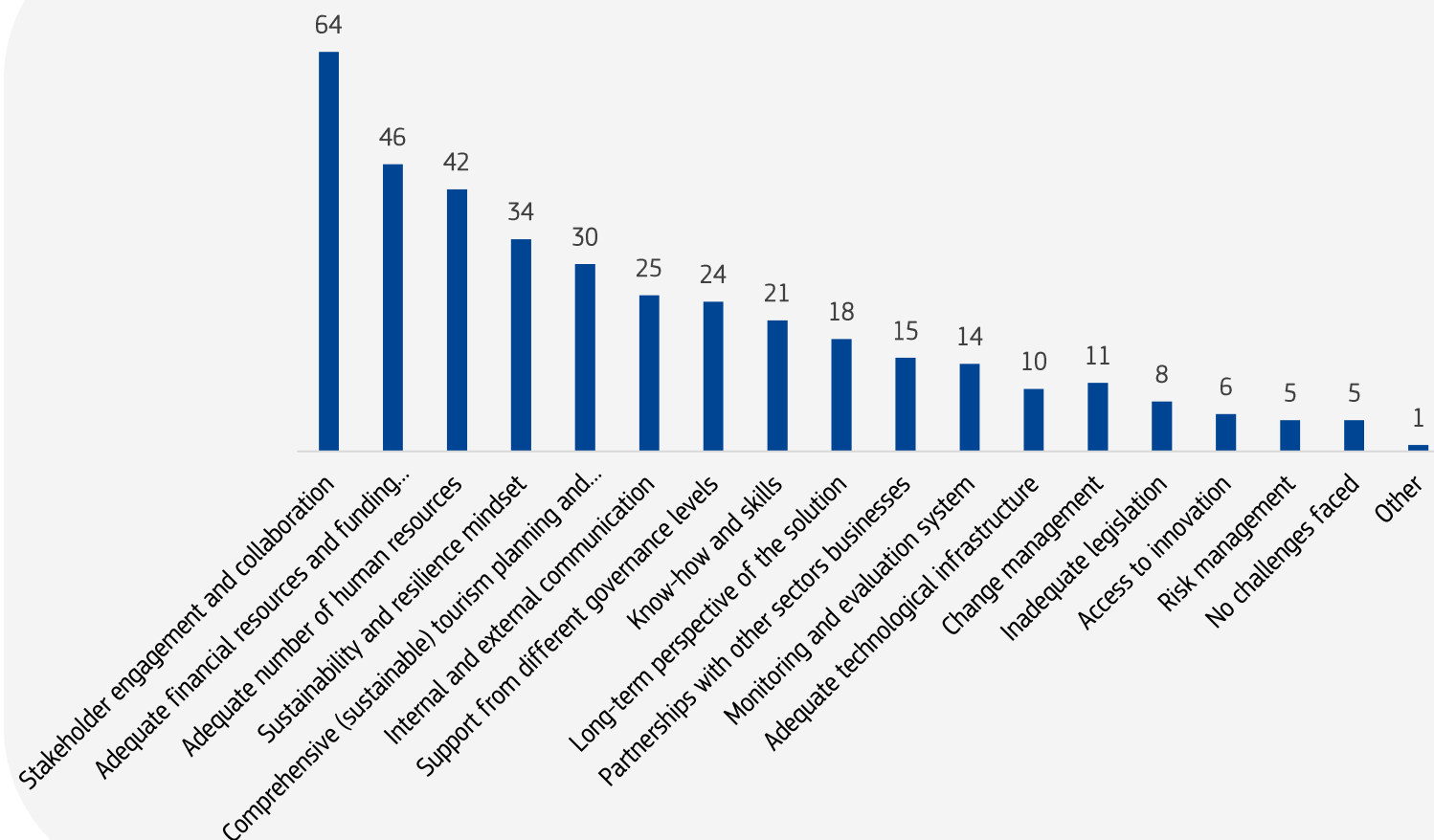
Solutions

Key challenges

Main evidence

- Achieving effective **stakeholder engagement & collaboration** is not easy, especially for small destinations
- **Financial resources and funding** are both a success factor and a challenge
- Lack of **human resources** underlines the need to increase the attractiveness of tourism jobs
- **Sustainability and resilience mindset** are both a success factor and a challenge

Key challenges



Solutions

Awareness-raising activities

41% of respondents have undertaken awareness-raising activities, while **22%** are currently developing such initiatives

Main initiatives

Educational campaigns

To inform visitors about sustainable practices they should implement

Partnerships with local organisations

To promote responsible tourism and spread knowledge among tourists

Sustainable tourism assessments

To enhance responsible tourism among service providers & visitors

Digital tools

To provide info on sustainable practices, tips for visitors, and local sustainable tourism efforts

In-presence events

To stimulate visitor engagement

Improving local infrastructures

To support responsible tourism and underline the importance of responsible behaviours

Guidelines

Setting out rules and recommending best practices

Sustainable modes of transport

Promoting more responsible alternatives

Survey results

Participation in the project

Engagement in the project

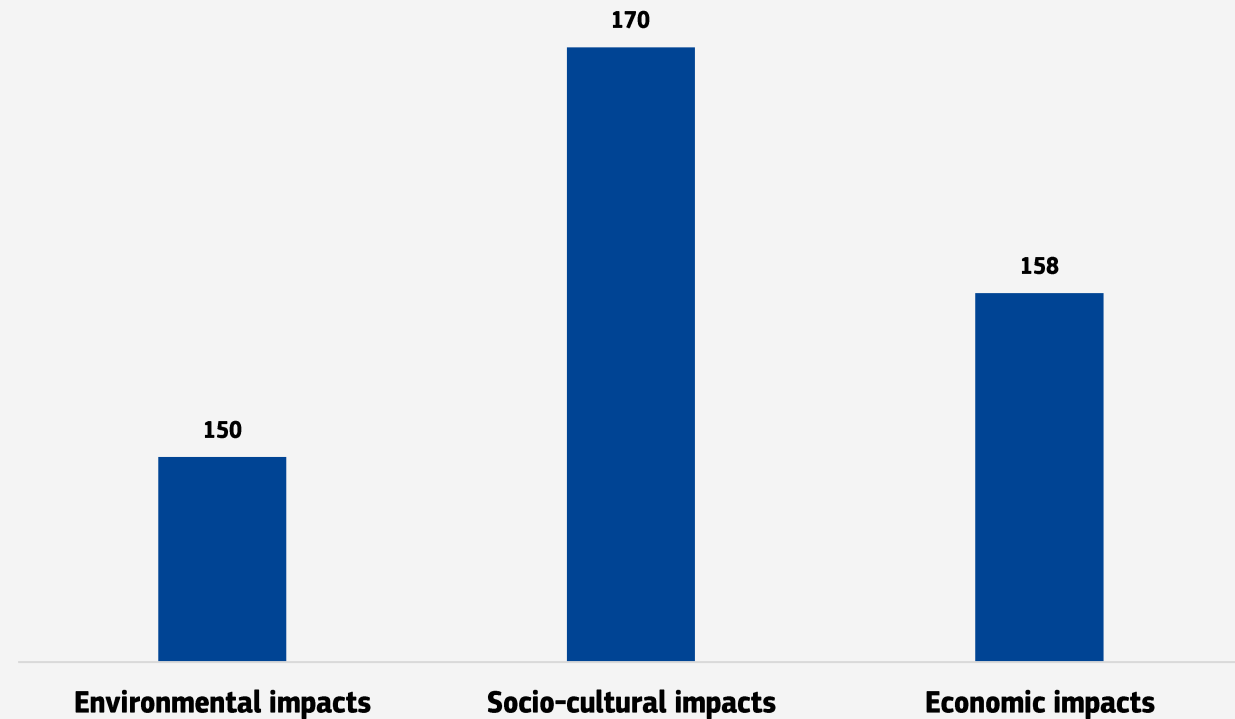
Main impacts to be addressed

Main results

Engagement in the project & impacts to be addressed

- **93%** of respondents showed interest in the project's activities
- Respondents prefer prioritising **socio-cultural impacts**, followed by **economic** and **environmental impacts**

Main impacts to be addressed by the project



Engagement in the project

Proposed TAIEX* experts

Main results

Key stakeholders

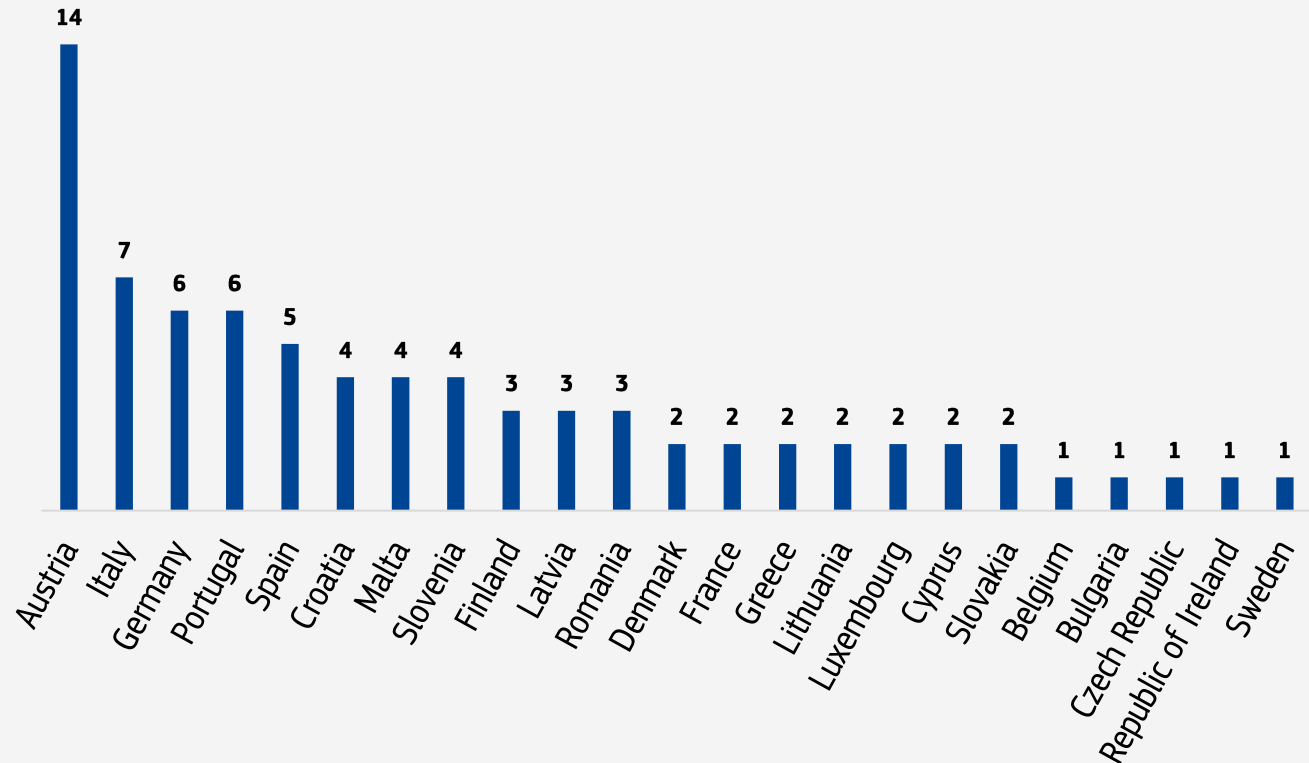
- **78 sustainable tourism experts** were proposed by DMOs for the TAIEX data base
- Most expert profiles were provided by **Austria** (14 experts), **Italy** (7), **Germany** and **Portugal** (6 each), and **Spain** (5)

TAIEX supports public administrations with the approximation, application and enforcement of EU legislation as well as facilitating the sharing of EU best practices.

TAIEX EIR provides tailored support to national authorities implementing environmental policy and legislation.

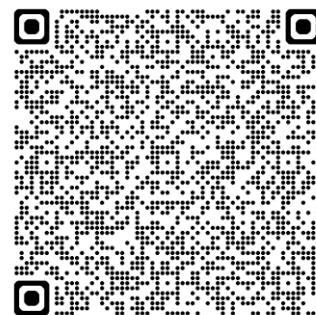
TAIEX REGIO funds exchanges among authorities implementing EU cohesion policy programmes (including ERDF, Cohesion Fund, Just Transition Fund)

Experts proposed, per country



For more information

visit the project website: [Sustainable EU Tourism - Shaping the Tourism of Tomorrow](#)



**SUSTAINABLE
EU TOURISM**



Shaping the Tourism of Tomorrow