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COMMISSION STAFF WORKING DOCUMENT

**Scenarios towards co-creation of transition pathway for tourism for a more resilient,
innovative and sustainable ecosystem**

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1 INTRODUCTION

Tourism is at a crossroads. The tourism ecosystem was growing steadily in Europe and globally, until the COVID-19 pandemic drastically changed people's possibilities and interest in travelling, eating out, recreational and cultural activities. While intensive COVID-19 vaccination campaigns across Europe are bringing the spread of the virus down and enabling travelling and tourism activities to restart, going back to pre-crisis tourism doesn't suffice. The recovery from the shock should also be taken as an opportunity to address changing consumer needs and steer the tourism ecosystem towards more resilient, digital, and greener practices.

On 10 March 2020, the Commission adopted a new Industrial Strategy to help Europe's industry lead the green and digital transformations and to drive Europe's global competitiveness and strategic autonomy. Following the experience of the COVID-19 pandemic, the update of the EU Industrial Strategy¹ highlights the need to further accelerate the green and digital transitions and increase resilience of EU industrial ecosystems. To do so, the Commission proposes the co-creation of transition pathways with stakeholders, as an essential collaborative tool for the transformation of industrial ecosystems. The pathways will allow to identify the scale of actions and the challenges, including for instance investment or technology needs, to accompany the industry's transitions towards 2030 and beyond. Priority is given to the ecosystems that face the most important challenges and have been most heavily affected by the crisis.

As shown in the Annual Single Market Report², the COVID-19 crisis had a strong impact on the tourism ecosystem, its turnover and employment levels. Women, youth and low-income workers have been particularly affected by the crisis, due to the fact that they represent a large majority of employees in the tourism ecosystem. There is a concrete need to start co-creating a transition pathway for the tourism ecosystem together with its stakeholders. This transition pathway should aim to describe what the digital and green transition and increasing resilience mean for the tourism ecosystem and what measures and commitments are needed to accompany this transition. The timing of this document also aims to provide impetus to the tourism ecosystem to ensure that the recovery after the COVID-19 crisis is being leveraged for the twin transition. This document uses as a basis and builds further on the analysis of the tourism ecosystem as published in the Industrial Strategy update.

This document is a Staff Working Document for the purposes of consultation and co-creation with stakeholders. It does not constitute the official position of the Commission, nor does it prejudice any such position. It is the first step towards co-creating a vision of 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 Deal³ and Digital Decade⁴. This document already draws on previous consultation processes and positions provided by tourism stakeholders, including the European Tourism Convention⁵, and the European

¹ COM(2021) 350 final

² SWD(2021) 351 final

³ <https://ec.europa.eu/info/strategy/priorities-2019-2024/european-green-deal/>

⁴ https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en

⁵ The Convention gathered some 800 stakeholders and discussed policy recommendations around three key pillars: (1) safe and seamless tourism, (2) greener holidays and (3) data-powered tourism.

Parliament resolution on establishing an EU strategy for sustainable tourism⁶.

The objective of the current document is to launch discussions with stakeholders across the tourism ecosystem, which would result in matching commitments and concrete pledges. This consultation process invites the stakeholders to contribute to a bottom-up assessment of scale, cost, long-term benefits and conditions of the required actions to accompany the twin transition of the ecosystem. The finalised pathway will also support the effort of jointly building with Member States and tourism stakeholders the European Agenda for Tourism 2030/2050⁷. The implementation of the transition pathway will serve to share and project best practices in tourism sustainability and digitalisation globally.

1.1 The tourism ecosystem in the EU

Tourism refers to the activity of visitors taking a trip to a destination outside their usual residence, for less than a year. It can be for any main purpose, including business or leisure⁸. Tourism plays an important role in the EU economy: In 2019, tourism generated 9.5% of the total GDP and was responsible for 22.6 million jobs⁹. Out of 3.2 million tourism enterprises, 99.8% were micro or small and medium enterprises¹⁰. Tourism total contribution to GDP was over 15% in some countries (Croatia, Greece, Portugal) in 2019¹¹.

Tourism to the EU is facilitated by the common visa policy, which allows nationals of 60 third countries to travel visa-free to Member States¹². The EU is a leader in tourism globally, with four of its Member States among the world's top ten destinations for holidaymakers¹³. In 2019, international tourism accounted for 41% of arrivals, divided into intra-EU travelling (23%) and extra-EU travelling (18%)¹⁴.

The EU tourism ecosystem encompasses globalised and interconnected value chains comprising off-line and on-line information and services providers (tourist offices, digital platforms, travel technology providers), travel agents and tour operators, accommodation suppliers, destination managing organisations, attractions and passenger transport activities (for example, airlines, trains, and cruises). Very small companies operate alongside large multinational corporations. Private and public capital are intertwined.

In the EU, service providers at destination level (e.g. hospitality) are, in their majority, small local owners. Micro and small enterprises generate about 64% of the value added of the tourism ecosystem and employ 84% of its workers¹⁵. The proportion of micro and small companies is particularly high in hospitality (hotels, bars, restaurants), with many owners operating independently or under franchise from large groups. This is also true for travel agencies and coaches, though to a lesser extent. This entails heterogeneous supply chains of the tourism services and substantial coordination efforts in agreeing common objectives and pathways to change.

⁶ https://www.europarl.europa.eu/doceo/document/TA-9-2021-0109_EN.pdf

⁷ <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>

⁸ [Overview - Tourism - Eurostat \(europa.eu\)](#)

⁹ WTTC data from [Travel & Tourism Economic Impact | World Travel & Tourism Council \(WTTC\)](#)

¹⁰ Eurostat Structural Business Statistics

¹¹ [Travel & Tourism Economic Impact | World Travel & Tourism Council \(WTTC\)](#)

¹² For stays of up to 90 days in any 180-day period.

¹³ [International Tourism Highlights, 2020 Edition \(e-unwto.org\)](#)

¹⁴ Eurostat data for 2018

¹⁵ SWD(2021) 351 final, p.177

1.2 The impact of the COVID-19 pandemic

The COVID-19 pandemic has hit hard several sectors of the tourism ecosystem, especially accommodation, air travel, other international travel, trade fairs and cultural events. With a drop of roughly 70% in revenues in 2020¹⁶ and up to 11 million jobs at risk¹⁷, tourism services were at the bottom of the business confidence indicator in the beginning of 2021. Lockdowns have persisted into 2021 and prospects for the summer season are mixed. Eurostat data indicates an 82% plunge in international tourist arrivals to accommodation establishments in EU during the period April 2020 to March 2021, compared with the twelve months preceding the pandemic, and travel demand is expected to remain below its pre-pandemic trajectory until 2024¹⁸. However, spurred by the vaccines, European travellers' mood is upbeat for summer holidays, with 56% of Europeans willing to travel by the end of August, mostly to domestic and intra-EU destinations¹⁹.

The accommodation and food services (hotels and restaurants) were severely hit by the pandemic. Despite a recovery in the third quarter, the turnover of these services in the fourth quarter of 2020 was only about half of what it had been one year earlier²⁰. According to Labour Force statistics, employment in accommodation and food services stood in the last quarter of 2020 about 18% below the level of one year earlier (2019Q4). At a more disaggregated level, Labour Force statistics show that the accommodation sector experienced a 21.3% employment loss between 2019 Q4 and 2020 Q4. In the same period, travel agencies activities lost 21.7% employment and food activities lost 14% employment²¹.

In 2020 compared with 2019, 1.5 billion less nights (-52 %) were spent in EU tourist accommodations²². Hotels recorded a drop of 70% between 2020 and 2019, while the campsites, supported by domestic tourism, were less affected. Many museums were also closed due to the COVID-19 pandemic with 75% reporting losses in income between up to EUR 1,000 – 30,000 per week²³. In 2020 compared with 2019, nights spent by non-residents (guests from another country) fell by 68%, while nights spent by residents (domestic tourists) fell by 38%. Although domestic tourism was less affected, it could only partly compensate for the decline of inbound tourism, and so the countries that depend on cross-border tourism have been hit the hardest.

2 VISION 2030: PATHWAY FOR THE TRANSITION OF EU TOURISM

The heterogeneity of the tourism ecosystem requires diversified and adapted support at European level and a connecting vision, which can facilitate concerted actions by all stakeholders and Member States. This vision must consider the trends and changes in tourism demand, visible already before COVID-19, and further shaped by the pandemic (see Annex) and supply, to lead the transformation required by the green and digital transitions. By using

¹⁶ UNWTO (2020), '[World Tourism Barometer](#)', Volume 18, Issue 6, October 2020

¹⁷ European Commission Joint Research Centre (2020), '[Behavioural changes in tourism in times of Covid-19: Employment scenarios and policy options](#)', JRC Science for Policy Report

¹⁸ [Monitoring Sentiment for Domestic and Intra-European Travel \(Wave 6\)](#)

¹⁹ [Monitoring Sentiment for Domestic and Intra-European Travel \(Wave 6\)](#)

²⁰ [Impact of Covid-19 crisis on services - Statistics Explained \(europa.eu\)](#)

²¹ European Commission DG Employment and Social Affairs (2021), [Employment and Social Developments in Europe](#), Chapter 2, Section 2, *forthcoming*.

²² [Tourism statistics - nights spent at tourist accommodation establishments - Statistics Explained \(europa.eu\)](#)

²³ <https://www.ne->

[mo.org/fileadmin/Dateien/public/NEMO_documents/NEMO_COVID19_FollowUpReport_11.1.2021.pdf](https://www.ne-mo.org/fileadmin/Dateien/public/NEMO_documents/NEMO_COVID19_FollowUpReport_11.1.2021.pdf)

the concept of the transition pathway, it is recognised that the multifaceted challenges and the dispersed ecosystem require solutions that cannot be known or developed all at once, or by one actor alone.

The current document proposes scenarios for a more resilient, sustainable and digital tourism ecosystem, which will contribute to forming a shared vision for 2030 in collaboration with all relevant public and private stakeholders. The stakeholders are considered very broadly: industry, associations, destinations, networks, public authorities, NGOs, other European institutions, and other organisations. The stakeholders are invited to match and exceed the ambition presented in this Staff Working Document, indicating their own proposed scenarios and pledges or commitments to get there. They should also provide their views on the costs and the long-term benefits of the twin transition. Furthermore, they are asked to suggest concrete actions, targets and progress indicators for the ecosystem, together with their commitments to work on addressing these issues.

2.1 A resilient and competitive EU tourism ecosystem

Resilience can be defined as the ability not only to withstand and cope with challenges but also to undergo transitions in a sustainable, fair, and democratic manner²⁴. That ability is determined by interacting factors including business and labour demography, market characteristics, regulatory environment, and the type / level of public funding. The pandemic has shown how vulnerable the tourism ecosystem can be towards external shocks. Injecting liquidity and special support measures have been needed all over Europe, and the recovery will be much more difficult in some regions and sectors than others. This shock is now the opportunity to learn from experience and build back better, in terms of resilience, sustainability, benefiting from the digital opportunities and innovation.

The worst affected Member States by the COVID-19 pandemic are those highly dependent on tourism and unable to compensate the loss of foreign, EU and non-EU, travellers with domestic demand. Most key travel and tourism infrastructures are not designed to operate efficiently under crisis conditions, such as the current pandemic. It is important to ensure that the aftermath of the pandemic will not create long-term problems for international travelling, for example by having incompatible vaccination certificates between continents. The health and safety concerns of visitors may impact their travel preferences and it will be crucial to promote Europe as a safe and quality destination.

At the same time, it is important to ensure that the health and safety of all workers in the sector, including seasonal workers, is adequately protected in line with the existing EU occupational safety and health directives²⁵. EU guidance, published by the European Agency for Safety and Health at Work,²⁶ provide useful support for employers in managing occupational safety and health risks, including for COVID-19. This guidance includes national sector specific guidelines.

During the COVID-19 shock, the European tourism ecosystem has been supported with liquidity and funding measures. The estimated investment gap for 2020-21 is EUR 161 billion (highest of all ecosystems)²⁷. High level of indebtedness increases the risk of slow restart, and also of the ownership of some services moving outside Europe. This can further reduce the

²⁴ COM(2020)493

²⁵ Council Directive 89/391/EEC

²⁶ [Healthy Workplaces Stop the Pandemic - Safety and health at work - EU-OSHA \(europa.eu\)](https://osha.europa.eu/en/health-topics/covid-19/healthy-workplaces-stop-the-pandemic-safety-and-health-at-work-eu-osha)

²⁷ SWD(2020) 98 final, 'Identifying Europe's recovery needs', p. 41

capacity of tourism enterprises to invest in the development of more resilient supply chains and new services. Furthermore, compared to other ecosystems, the tourism ecosystem is low paid, employing a majority of young and female employees for highly demanding work. During COVID-19, part of the people working for the tourism ecosystem may have moved to other sectors, which could reduce the capacity of tourism ecosystem to restart.

The tourism ecosystem is very important for the overall employment in Europe and there is a lot at stake in supporting economic activity in this ecosystem. There are many reasons why Europe is a very popular tourist destination and the ecosystem most probably also faces unmet potentials. The recovery and resilience funds must ensure that the tourism sector is better prepared by the possible next pandemic. Adequate short-time work schemes should be in place to protect workers and their income. Sufficient aid programmes should be available for businesses and enterprises to help them through the temporary difficulties. Social dialogue should be developed to ensure that working conditions and job quality is high and training approaches should be developed to provide the ecosystem with the necessary competencies to be innovative.

Additionally, investments in the tourism ecosystem should contribute to equal access and accessibility²⁸ for persons with disabilities and with reduced mobility, in terms of accessible infrastructure, transport, information and support services as well as facilitating the right to enjoy holidays. In 2018, it was estimated that 28.3% of the EU population aged 16 or over could not afford a one-week annual holiday away from home. This could be addressed together with reducing the high seasonality²⁹ of tourism in many regions, linked with rising interest in proximity tourism, rural and eco-tourism, and considering the emerging practices for teleworking outside of habitual residence.

Currently, 80% of the European online market (travel agencies) is held by two multinational companies. The COVID-19 restrictions have weakened the European tourism ecosystem actors. Extra-EU companies may become more competitive by using or developing online services for European tourism based on the business intelligence gathered through their platforms. There is therefore a strong need to support European business innovation and data-empowered platforms, together with ancillary service providers specialising in data analysis.

2.1.1 Recovery steps for the summer season 2021

The very first step of the transition pathway is to recover for the 2021 summer season. A successful summer is essential for the survival of the businesses and for their capacity to embark on the transition. At the same time, while vaccine uptake has increased at a rapid pace, with over half of the EU adult population having received at least one dose of a COVID-19 vaccine by mid-June³⁰, the emerging variants of concern present an important threat that requires strong surveillance. Whilst taking account of the need to protect public health and surveying the epidemiological developments, the services should restart as soon as possible, to support businesses and employees in the ecosystem.

To that end, the Commission has established several measures to support an safe, effective and coordinated relaunch of tourism activities:

²⁸ See European standards on accessibility: Accessibility requirements for public procurement of products and services in the ICT domain (H) EN 301 549; Accessibility requirements for public procurement in the Built Environment (including transport infrastructures EN 17210; and Accessibility following Design For All in relevant standardization activities EN 17161

²⁹ [JRC Publications Repository - Territorial patterns of tourism intensity and seasonality in the EU \(europa.eu\)](https://ec.europa.eu/economy_finance/publications/repository/territorial-patterns-of-tourism-intensity-and-seasonality-in-the-eu)

³⁰ <https://gap.ecdc.europa.eu/public/extensions/COVID-19/vaccine-tracker.html#uptake-tab>

- **Emergency relief and financial support.** As a first step to provide relief, the European Commission has mobilized all available means to save businesses and protect jobs in tourism (SURE, State aid, CRII+, REACT-EU; changes in EU legislation to provide temporary relief to the aviation sector³¹). In addition to emergency measures for SMEs hit by the COVID-19 crisis, the EU supports tourism recovery and transition through the Recovery and Resilience Facility and a number of funding options detailed in the ‘Guide on EU funding for tourism’³².
- **Building trust for safe travelling.** European Commission has supported and coordinated the efforts of the Member States in facilitating safe travel and mobility of people in the single market. Re-open EU platform³³ provides reliable information on travelling rules and restrictions of EU and supports cross-border travel planning. As regards air travel, the European Union Aviation Safety Agency (EASA) and European Centre for Disease Prevention and Control (ECDC) will update the joint document defining measures to assure the health safety of air travellers and aviation personnel³⁴ once airlines resume regular flight schedules following the severe disruption caused by COVID-19. By Commission’s initiative, CEN, the European Standardisation Organisation, developed a safety protocol and a COVID-19 Safety Seal label for tourism establishments³⁵.
- **EU Digital COVID-19 Certificate to reopen travelling within Europe.** A common framework for an ‘EU Digital COVID-19 Certificate’³⁶ start to apply as of 1 July 2021 to facilitate the exercise of the right of free movement within the EU during the COVID-19 pandemic, and to help ensure that restrictions currently in place can be lifted in a coordinated manner. It will be a digital proof that a person has either been vaccinated against or recovered from COVID-19, or received a negative test result. The certificate is free for the citizens and is accompanied by EUR 100 million support under the Emergency Support Instrument for affordable or free testing for persons who cross borders frequently for work, education or health reasons. The Council also updated the Council Recommendation on COVID-19 free movement restrictions in the EU³⁷, to coordinate the gradual easing of travel measures.
- A common **Digital Passenger Locator Form**³⁸ has been developed by the EU Healthy Gateways for possible use by Member States. Contact tracing is a central pillar of the fight against the spread of the virus, especially in connection with the emergence of new variants. To address this, Member States should consider requiring persons entering their territory through collective transport modes with pre-assigned seat or cabin to submit Passenger Locator Forms (PLF) in accordance with data protection requirements. Member States should be encouraged to join the PLF Exchange Platform, which is part of the Early Warning and Response System³⁹, to enhance their cross-border contact tracing capabilities for all transport modes. For this purpose, on 27 May 2021, the Commission amended its Implementing Decision (EU) 2017/253 as regards alerts triggered by serious cross-border

³¹ Regulation (EU) 2020/696; Regulation (EU) 2020/459; Regulation (EU) 2021/250

³² https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

³³ <https://reopen.europa.eu/en>, with close to 11 million visits since June 2020

³⁴ <https://www.easa.europa.eu/document-library/general-publications/covid-19-aviation-health-safety-protocol>

³⁵ https://ec.europa.eu/growth/content/new-european-tourism-covid-19-safety-seal-available_en

³⁶ Regulation (EU) 2021/953

³⁷ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02020H1475-20210202>

³⁸ <https://www.euplf.eu/en/home/index.html>

³⁹ Decision No 1082/2013/EU on serious cross-border threats to health, Early warning and response system (EWRS) <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32013D1082>

threats to health and for the contact tracing of passengers identified through Passenger Locator Forms⁴⁰.

- **Reopening Europe safely to the world.** The Council has adopted a recommendation to ensure that restrictions on non-essential travel into the EU are taken and lifted in a coordinated manner by Member States⁴¹. In May 2021, the Recommendation was revised to reflect the vaccination uptake and the improved epidemiological situation worldwide. Subsequently, the EU reopened to third-country nationals who have been fully vaccinated with the vaccines accepted by the European Medicine Agency (EMA) or, depending on Member States' stance, by vaccines that have been placed under the World Health Organization (WHO) emergency use list of vaccines. Furthermore, to facilitate free movement within the EU, discussions are ongoing on the possibility to recognise interoperable COVID-19 certificates issued by third countries as equivalent to the EU Digital COVID-19 Certificate.
- **A new Strategy⁴² for the Schengen area.** The Commission presented a new Strategy to make the largest free travel area in the world – the Schengen area – stronger and more resilient. This can be achieved by ensuring effective management of the EU's external borders, through the ongoing roll out of the European Border and Coast Guard standing corps; by reinforcing the Schengen area internally, as close cooperation between Member States on preventing and fighting security threats is crucial to sustain and compensate for the absence of controls at internal borders; and by improving preparedness and governance by revising the evaluation and monitoring mechanism and enlarging the Schengen area to those EU Member States that are not yet part of it.
- **Promotion and guidelines.** The Commission is supporting the relaunch of European tourism also by awareness raising and promotion campaigns. 'Open-up to Europe', the EU co-funded campaign promoting safe intra-EU tourism designed by the European Travel Commission has been launched on 1 June, with the support of 33 public and private partners. The Commission is also developing specific EU guidelines for re-opening of the cultural sector⁴³; these are aligned with the safety procedures established by the COVID-19 Safety Seal.

2.1.2 Possible pathways towards resilient and competitive tourism by 2030

In 2030, Europe should be perceived as a safe and secure destination for Europeans and international travellers alike. Tourism should become more diversified, inclusive, resilient and sustainable, with more popular destinations helping to better distribute travellers' flows and to mitigate problems arising from overtourism. More flexible working arrangements would ensure that tourism destinations could work at higher capacity throughout the year. The vulnerability of regions would be balanced due to new business models, which would make it possible to reach local and online customers throughout the seasons. Tourism careers would have improved with longer work contracts and greater opportunities for up- and re-skilling, which would have contributed to the green and digital transition of tourism and its workforce

As lessons learnt from the COVID-19 crisis, both tourists and tourism services will value health and hygiene standards. There should be a central information point on cross-border rules to facilitate travelling in case exceptional circumstances impact travelling and

⁴⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021D0858>

⁴¹ Recommendation (EU) 2020/912

⁴² COM(2021) 277 final

⁴³ Announced in the COM(2021) 129 final

interaction of the population. Overall, by 2030, the tourism ecosystem shall become more resilient and more sustainable with increased digitalization and with better management and mitigation of the detrimental impacts of tourism for the environment, human health and local communities.

Some of the possible developments that could support the above described future are proposed in the following table. The key questions for the stakeholders are:

- What other issues would you propose to be ambitiously considered for this pathway?
- What additional or different common output scenarios for 2030 would benefit the development of a resilient tourism ecosystem?
- 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?

Issues*	Actions and possible division of roles	Possible output scenarios for 2030
Improve the EU capacity to manage shocks affecting travelling	<p>Commission: develops preparedness for launching coordinated actions for exceptional restrictions for the free movement in the Single Market, including via the Single Market Emergency Instrument.</p> <p>MS: efforts could focus on national preparedness for exceptional situations which require coordination on national and European level regarding free movement within and between MS and countries outside the EU</p> <p>Industry: could undertake investments in adaptation and preparedness</p>	EU would be prepared to quickly coordinate the actions of the MS and provide up-to-date and clear information for travelling, if needed.
Improve effective leveraging of funds for retrofitting / upgrading key travel and tourism infrastructures	<p>Commission: informs about funding opportunities (Recovery and Resilience Facility (RRF), regular update of the Guide on EU funding for tourism⁴⁴)</p> <p>MS/Regions: could inform about national and local funding, effective allocation and absorption of funds available under RRF and Multi-annual Financial Framework programmes and national/local funding</p> <p>Industry and destinations: could actively participate in open calls and upgrading infrastructures, boost private investments</p>	[90%] of key travel and tourism infrastructures able to operate close to normal capacity under crisis conditions, preserving safe and seamless travel.
Enhancing cross border cooperation , considering initiatives at sea basin and macroregional level	<p>Commission: takes stock of the initiatives at sea basin and macroregional level</p> <p>MS/Regions: could capitalize on best practices exchange and regional cooperation</p> <p>Industry and coastal destinations: could contribute through active participation of especially SMEs and startups</p>	Improved regional policy instruments for resilient and sustainable tourism
Health and safety protocols of tourism industry to promote trust for	<p>Commission: invites and supports enhanced safety protocols for travel and tourism services</p> <p>MS/Regions: could promote adoption of EU or equivalent safety protocols</p> <p>Industry: could actively adopt and display European or</p>	[70%] of tourism establishments have adopted and display a health and safety seal, possibly integrated to

⁴⁴ https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

customers	equivalent Safety Seal; develop quality labels that integrate health and safety protocols	other quality label.
Improving access to tourism and reducing regional vulnerability	<p>Commission: informs about funding available for tourism businesses, social tourism and regional development</p> <p>MS/Regions: could monitor the tourism seasonality and density and search strategical response, including considering accessible tourism</p> <p>Destinations: could establish strategies for addressing accessible tourism for all, including persons with disabilities and with reduced mobility, and overtourism</p>	Off-season tourism strategies, including accessible tourism and combined forms of leisure and teleworking, established in almost all [90%] of destinations.
Digitalisation of Schengen visa procedures for third-country nationals	<p>Commission: works on fully digitalising visa processes (e.g. multiple-entry visas, digital application process, categories of travellers)</p> <p>MS: could implement new digital Schengen visa processes</p> <p>Industry: could invest in technology to support the process</p>	Improved Schengen short stay visa regime, and application processes increase attractiveness of the EU as a tourism destination
Digitalisation of travel documents and facilitation of travel for EU citizens	<p>Commission: presents in 2023 a proposal for a Regulation on digitalisation of travel documents and facilitation of travel.</p> <p>MS: Implement the digital travel documents and travel facilitation.</p>	Improved and faster border procedures which support cross-border tourism
Supporting competitive, resilient and innovative European tourism businesses	<p>Commission: supports European innovative tourism SMEs and industrial collaborations through Enterprise Europe network, Single Market Programme, Horizon Europe, and other programmes mentioned in the Guide on EU funding for tourism</p> <p>MS/Regions: could provide funding and innovation guidance to the SMEs, especially on the vulnerable regions</p> <p>Industry and destinations: could engage actively in building innovative partnerships and benefiting from funding options</p>	[50%] of tourism enterprises have business strategies towards enabling their active operations all around the year
Skilling approaches for the tourism workforce on the modern demands of tourism	<p>Commission: supports development and signing of a skills partnership for tourism</p> <p>MS/Regions: could ensure active coordination of skills approaches for the tourism ecosystem</p> <p>Industry: could engage actively in the reskilling and upskilling of the workforce, appreciate young workers with relevant training for tourism</p>	[70%] of the tourism workforce has been trained in a degree relevant for tourism or participated in a reskilling/upskilling approach.
Insufficient knowledge base of the tourism ecosystem	<p>Commission: could identify data gaps to properly monitor the resilience and competitiveness of the tourism ecosystem, and proposes new data to be collected, leveraging new data sources as well as data generated by the tourism service providers.</p> <p>MS: could transpose the Commission guidelines to collect the needed data at high resolution and frequency, in a seamless and as much burden-free possible manner.</p> <p>Destinations and industry: could engage directly in the data transmission as per the MS guidelines.</p>	Detailed and sound data and indicators concerning the resilience and competitiveness of the tourism ecosystem are available in a timely manner, to identify issues and support policy.

* A non-exhaustive list for the purposes of the consultation. The table is based on several consultation processes and positions provided by tourism stakeholders. This is a European Commission staff working document. It does not constitute the official position of the Commission, nor does it prejudice any such position

2.2 Greener tourism destinations and services

The UN World Travel Organisation defines sustainable tourism to 'take full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities'⁴⁵. While in this document the social and economic impacts are considered under the 'resilience' axis, the primary focus under the sustainability goal of this pathway is ensuring that the tourism ecosystem supports sustainability and green targets in line with the ambitions outlined in the European Green Deal, at the same time sharing the benefits and contributing to the wellbeing of the local communities at the destinations. NGOs and environmental agencies in countries and regions are doing important work towards these objectives.

Among the industry, there is still a lack of awareness of the tangible benefits of 'greening' the tourism ecosystem⁴⁶, e.g. applying circularity actions that result in reduced costs in the long-term, tapping into profitable markets for low-carbon products and services, or promotion of businesses by using ecological labels. There is also a lack of sufficient skills and resources to develop business innovations around sustainability objectives and demand. At the same time, the industry notes that despite growth in consumer demand for a more sustainable tourism experiences, sustainability is not yet the key driver for consumers' choice of tourism products and services. Boosting consumer awareness about sustainability in tourism and hospitality needs to be addressed in order to enable consumers to make responsible choices. Experts agree⁴⁷ that for developing sustainable cultural tourism, local and regional planners need to consider the impact of climate change and the surrounding natural environment when developing destinations. This entails measures for both climate change mitigation and climate change adaptation.

Travel and tourism greatly depend on a healthy and clean environment, rich biodiversity as well as on flourishing local society and culture. As the tourism interest for 'nature & outdoors' is growing and the COVID-19 pandemic has increased the demand of proximity based tourism and less crowded destinations in nature and open air, nature-based tourism can make an important contribution to the recovery of tourism. However, it is important to ensure that tourism does not put under pressure the biodiversity and the natural areas upon it depends. In particular, when tourism concerns nature and protected areas, like the EU Natura 2000 network⁴⁸, tourism industry should work in close cooperation with the nature management authorities to develop sustainable tourism products and accommodations that have no impacts on the natural assets of the area.

At the same time, tourism globally accounts for around 8% of GHG emissions. Emissions from transport (in particular air and cruises) and the built environment account for 95% of tourism's emissions, meaning that reductions from those two sectors will dictate much of its mitigation potential⁴⁹. One of the recommendations of the European Tourism Convention in October 2020⁵⁰ called for a coordinated approach and a toolkit for supporting decarbonisation of tourism destinations. Research and innovation can play a key role in supporting these objectives, as do investments in low-carbon or carbon-neutral construction, infrastructure and mobility solutions.

⁴⁵ <https://www.unwto.org/sustainable-development>

⁴⁶ Based on discussions and interactions with stakeholders

⁴⁷ <https://op.europa.eu/en/publication-detail/-/publication/164ea9c5-2255-11ea-af81-01aa75ed71a1>

⁴⁸ https://ec.europa.eu/environment/nature/natura2000/index_en.htm

⁴⁹ Climate Change: Implications for Tourism, University of Cambridge, 2014

⁵⁰ https://ec.europa.eu/growth/content/european-tourism-convention_en

In terms of food waste, the hospitality industry contributes with 12% of total food waste in Europe⁵¹. Sustainable tourism monitoring labels support tracking food waste, but currently there are no coordinated approaches to advise the tourism ecosystem actors on building their specific sustainability strategies or select and apply specific sustainability monitoring schemes and labels. In general, there are no clear baselines or targets established at EU level for tourism destinations and businesses on sustainability measurements.

2.2.1 Possible pathways towards sustainable tourism by 2030

For 2030, we aim at Europe as a quality destination known globally for its sustainable offer, and attracting responsible and environmentally conscious travellers. A cultural change from growth-oriented mind-set and a lack of environmentally aware consumption would have led towards a more sustainable, responsible and climate-neutral tourism ecosystem. New tourism start-ups would appreciate in their businesses ecological, social, economic and cultural sustainability and aim to reduce the impact of tourism to the environment.. Robust and commonly shared labelling and rating frameworks for sustainability of tourism products would enable transparency and informed consumers' choices.

In 2030, sustainable tourism should be well aligned with the sustainable mobility strategies, both supporting each other in promoting multimodal, active, sustainable and integrated transport and travelling options. Increased domestic and intra-EU tourism contribute both to the development of sustainable mobility options and to the resilience of European tourism. The improved demand and offer for sustainable tourism would be supported by active promotion of responsible travelling and sustainable mobility plans (SUMP). Travelling by rail should be considered an attractive option with good connections across Europe. Travellers would be interested in a balanced manner in city breaks and a broad variety of alternative tourism options in rural areas, such as cultural tourism, eco-tourism, agritourism, appreciating local life and experiences and supporting local communities. This would contribute to new opportunities for tourism actors to innovate their business models through increased circularity and more sustainable practices.

By 2030, most EU tourism destinations should have implemented their sustainability strategy with clear benchmarking and tracking system, in line with the local, regional and national policies, to support sustainable goals, including but not limited to significant reductions in GHG emissions compared to nowadays. Common key sustainability indicators would help to follow how tourism ecosystem contributes to the achievement of the climate-neutrality⁵², circular economy and other sustainability objectives for the EU. The focus on sustainability would help the tourism industry to ultimately save resources, protect nature, become more resilient and reduce negative impacts on communities, while sharing the benefits.

⁵¹ Source Hotrec: European hospitality industry guidelines to reduce food waste

⁵² In line with the sector-specific roadmaps charting the path to climate neutrality prepared under the Climate Law Regulation agreed in April 2021

Some of the possible developments that could support the above described future are proposed in the following table. The key questions for the stakeholders are:

- What other issues would you propose to be ambitiously considered for this pathway?
- What additional or different output scenarios for 2030 would benefit the development a sustainable tourism ecosystem?
- 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?

Issues*	Actions and possible division of roles	Possible outcome scenarios for 2030
Unsustainable mobility with high carbon-footprint for tourism transport	<p>Commission: implementation of the Sustainable and Smart Mobility Strategy⁵³, support from Horizon Europe Partnerships, considering the preparation of the Alliance on Zero Emission Aviation</p> <p>MS/Regions: could actively support sustainable mobility developments</p> <p>Destinations: could draft and implement sustainable mobility plans following the European principles and guidelines, and promote them as part of tourism campaigns</p> <p>Industry: could actively collaborate with local administrations on finding innovative business models for sustainable transport options</p>	<p>At least [70%] of local and domestic tourism offer is based on climate-neutral travel options, including collective travel</p> <p>Multimodal digital mobility services facilitate seamless multimodal (waterborne, bikes, trains, bus & coach) passenger transport for visitors and residents alike</p>
Need to strengthen the sustainable development of coastal and maritime tourism including cruise and yachting	<p>Commission: implementation of the European Strategy for more Growth and Jobs in Coastal and Maritime Tourism⁵⁴</p> <p>MS/Regions: could actively support sustainable mobility developments</p> <p>Destinations and Industry: could actively collaborate with local administrations to diversify the offer for tourists so as to reduce seasonality and find innovative business models for a more sustainable coastal, maritime and cruise tourism</p>	<p>Increase by 70% coastal resilience , 60% eco-tourism coastal and insular destinations, invest in nature based solutions, reduce by 60% costs for protecting coastal areas</p>
Lack of a shared framework for sustainability monitoring for destinations	<p>Commission: collaborates with MS and Destinations to establish Key Performance Indicators for a common charter for sustainable destinations</p> <p>Destinations and Industry: could actively engage in developing a sustainability charter and commit to its implementation</p>	<p>At least [60%] tourism destinations of subscribed to EU Sustainable Destination Charter and provide online information about their sustainability strategy and Key Performance Indicators</p>
Low involvement of tourism destinations and industry in	<p>Commission: supports best practice sharing between MS, regions and destinations</p> <p>MS/Regions: could develop climate change</p>	<p>All destinations are part of national and regional climate change adaptation strategies and relevant</p>

⁵³ COM(2020) 789 final

⁵⁴ Commission Communication “A European Strategy Strategy for more Growth and Jobs in Coastal and Maritime Tourism” of 20 February 2014; COM(2014) 56 final

<p>climate change prevention and adaptation strategies and relevant concrete initiatives</p>	<p>adaptation strategies and concrete initiatives</p> <p>Destinations and Industry: could actively engage in developing and implementing national and regional climate adaptation initiatives</p>	<p>concrete initiatives</p>
<p>Insufficient commitments to green and local consumption, which would concretely put into practice and make visible sustainability values and tools towards climate-neutrality, and consumption of local products</p>	<p>Commission: provides advice and guidance for stakeholders following the example of the Green Consumption Pledge⁵⁵, drives green public procurement actions</p> <p>MS/Regions: could promote green public procurement, green consumption for destinations and SMEs, including consumption of local products (in particular food)</p> <p>Destinations: could publish and follow sustainability commitments on the destination level</p> <p>Industry: could adopt and align methods to calculate the environmental footprint of the tourism companies, including their supply chain, for example using the Environmental Footprint methodology⁵⁶ and environmental management scheme recommended by the Commission⁵⁷; intra-industry agreement/ industrial standard on sustainability rating of tourism products</p>	<p>By 2030⁵⁸, there will be at least 100 climate-neutral cities in Europe who use this achievement for attracting responsible tourism</p> <p>At least [90%] destinations in Europe publish concrete commitments to sustainability</p> <p>At least [50%] tourism enterprises are climate neutral and [100%] actively mitigate their carbon emissions</p> <p>At least [60%] of hospitality establishments, resorts, wellness centres observe and reduce water use</p> <p>At least [60%] of hospitality establishments observe and reduce pollution, including plastic waste</p> <p>[90%] of tourism destinations contribute to the protection and restoration of nature and biodiversity</p>
<p>Insufficient energy efficiency and use of renewable energy sources for of buildings used for tourism, as part of Renovation Wave initiative⁵⁹</p>	<p>Commission: provides financial and technical support; advice on the Renovation Wave initiative; promotes sustainable and creative solutions under European Bauhaus initiative⁶⁰ Supports through Horizon Europe</p> <p>MS/Regions: could engage actively in the RW initiative</p> <p>Destination: could consider making buildings for tourism more attractive in terms of quality and design</p> <p>Industry: could contribute to the targets of and benefit from the Renovation Wave for improving the energy efficiency of accommodations and other tourism related buildings.</p>	<p>At least [75%] of tourism related establishments (e.g. hotels, museums, cultural attractions, theatres, stations, airport terminals, etc) have improved the energy efficiency of their buildings compared to 2020.</p> <p>At least [50%] of new construction of tourism related establishments use low-carbon solutions to improve the materials efficiency and reduce the emissions intensity of the building materials used.</p>
<p>Lack of uptake of sustainability</p>	<p>Commission: provides advice and support through EEN sustainability advisors⁶¹ and Single Market</p>	<p>Increase substantially the use of EU Ecolabel by tourism</p>

⁵⁵ https://ec.europa.eu/info/policies/consumers/consumer-protection/green-consumption-pledge-initiative_en

⁵⁶ Organisation Environmental Footprint method, <https://ec.europa.eu/environment/eussd/smgp/index.htm>

⁵⁷ EU Eco-Management and Audit Scheme (EMAS), https://ec.europa.eu/environment/emas/index_en.htm

⁵⁸ EU sustainable and smart mobility strategy (COM(2020)789 final) aims a 100 climate-neutral cities in Europe

⁵⁹ https://ec.europa.eu/energy/topics/energy-efficiency/energy-efficient-buildings/renovation-wave_en

⁶⁰ https://europa.eu/new-european-bauhaus/index_en

⁶¹ SME strategy calls for EEN sustainability advisors; setting up a tourism specific helpdesk could be developed through a Coordination and Support Action under the SMP Work Programme Call 2021

<p>schemes and strategies</p>	<p>Programme actions; support more sustainable business models through the Sustainable Finance initiative; explore the possibility to expand the scope of the EU Ecolabel criteria</p> <p>MS/Regions/Destinations: could promote and support local SMEs to develop sustainability strategies and provide support on EMAS and EU Ecolabel or other relevant certification approaches</p> <p>Industry: could collaborate and commit to sustainability objectives as part of the business model; online platforms commit to promote sustainable accommodations and tourism establishments, in particular micro and small enterprises</p>	<p>accommodations</p> <p>[70%] of tourism accommodations use internationally recognised and recommended third-party validated label⁶²</p> <p>Increase substantially the use of environmental auditing scheme such as EMAS or ISO 14001 by tourism enterprises</p>
<p>Need to incorporate sustainability as one factor in the quality rating of tourism establishments</p>	<p>Commission: proposes a list of sustainability KPIs based on the Tourism Dashboard development; coordinate discussions through stakeholder platforms</p> <p>Industry: could develop intra-industry agreement on review and rating schemes incorporating sustainability; online platforms could promote sustainability criteria as part of online rating system for tourism establishments</p>	<p>[80%] of 4-5 star accommodations apply a rating system that incorporates measurable sustainability criteria</p>
<p>Low levels of up/reskilling support for the SMEs in sustainability</p>	<p>Commission: works with the industry to forge skills partnerships under the EU Pact for Skills</p> <p>MS/Regions: could ensure active coordination of skills approaches for the tourism ecosystem</p> <p>Destinations: Ensure that green skills are part of training and upskilling/reskilling programmes for the tourism ecosystem</p> <p>Industry: could engage actively in the reskilling and upskilling of the workforce, including managers of tourism enterprises, using also digital solutions for greener skills.</p>	<p>[70%] of the tourism workforce has been trained in sustainability skills⁶³</p>
<p>Insufficient knowledge base of the tourism ecosystem</p>	<p>Commission: could identify data gaps to properly monitor the environmental impacts of the tourism ecosystem, and proposes new data to be collected, leveraging new data sources and as well as data generated by the tourism service providers.</p> <p>MS: could transpose the Commission guidelines to collect the needed data at high resolution and frequency, in a seamless and as much burden-free possible manner.</p> <p>Destinations and industry: could engage directly in the data transmission as per the MS guidelines.</p>	<p>Detailed and sound data and indicators concerning the environmental impacts of the tourism activity are available in a timely manner, to identify issues and support policy.</p>

* A non-exhaustive list for the purposes of the consultation. The table is based on several consultation processes and positions provided by tourism stakeholders. This is a European Commission staff working document. It does not constitute the official position of the Commission, nor does it prejudge any such position.

⁶² For example: Green Key, Global Sustainable Tourism Council (GSTC) criteria

⁶³ Considering the European Competence Framework for Climate Change and Sustainable Development

2.3 Digitalisation of tourism

EU tourism SMEs are generally characterised by a low level of digitalisation⁶⁴, with most of the technologies employed focused on facilitating internal SME e-business operations, such as securing hotel bookings. The pandemic is expected to accelerate the trend towards digitalisation of tourism businesses (as for the rest of the economy). In 2020, 93% of travel agency and tour operator services had a website, and 59% had a website that allowed online ordering, reservation or booking possibility. However, many micro-sized enterprises are missing from official data, and there is lack of knowledge about their digitalisation needs and efforts.

Especially tourism SMEs in regions with high seasonality could potentially adapt their business models and reach new customers with digital and data-enabled innovation opportunities. Also new sustainable tourism innovations may often require initial investment in basic digital capacities and connectivity, for example, when farmers operate additional agritourism activities. Tourist facilities which make efforts in ‘greening’ their activities (eg. award of the EU Ecolabel, of EMAS) could in future receive increased visibility online (eg. on online booking platforms). Unfortunately, the data intensity of the small and medium tourism business is low and some remote and rural areas lack stable connectivity. Digitalising tourism would lead to a broad spectrum of opportunities for destinations and SMEs:

- New business opportunities: innovative models, solutions and ecosystems, new roles for consumers and producers through offering services as peers, scaling up of existing businesses, and help supply and demand meet;
- Better destination management: easing the impact of seasonal flows on local resources, infrastructures, transport systems, services, thereby integrating arrivals in a seamless and sustainable manner;
- Better visitor experiences: customised experiences during the visit as well as before, and after; integrated, easy-to-use, remote information on services, offers, maps, events, experiences, infrastructures available, and sustainability and safety levels;

Digitalisation of tourism develops in three directions, which are intertwined with one another. These may not be attainable for SMEs without support for skills and innovation:

- Online intermediate platforms mediate supply and demand on key services, such as short term rentals. Increasingly, online platforms combine different elements of tourism ecosystem activities: linking travel, accommodation, car rental, and other travel and entertainment services and offering an ecosystem solution to travellers’ needs
- Use of technologies in providing new types of tourism offers and services, e.g. combination of digitised cultural heritage items and virtual exploration of history with tourism visits, as well as to the process determining demand (search, choice, experience) and supply (advertising, pricing).
- Data processing, storing and mediating technologies, for example to determine demand and develop new supply of tourism services (e.g. based on data about search, choice, reviews). Access, sharing, storage, use and understanding of data contribute to developing and enhancing tourism businesses through making full use of its potential (business

⁶⁴ Study report ‘Digitalisation in Tourism - In-depth analysis of challenges and opportunities’, https://vbn.aau.dk/ws/portalfiles/portal/296441087/REPORT_TourismDigitalisation_131118_REV_KB_EM_4_.pdf

intelligence, analytics, statistics, social media management).

In October 2020, the European Tourism Convention⁶⁵ developed and endorsed a set of action points to seize the opportunities of data-driven development. The recommendations highlighted European strategy on data⁶⁶, digitalisation of tourism, and working towards common stakeholder agreements on data sharing, based on comprehensiveness and interoperability of and open access to data.

2.3.1 Possible pathways towards digitally empowered smart tourism by 2030

By 2030, the leap in the digital skills development of consumers during COVID-19 should be fully matched by the development of the digital skills and digital business models of the tourism enterprises. The collaborative economy should rely on frameworks that support responsible, fair and trusted practices, e.g. on the accommodation sector. Data would be widely shared in a fair and equitable manner⁶⁷. Digital services, data sharing and mobile apps would be actively used by customers and businesses for balancing tourism concentration, reducing waiting times and allowing last-minute decisions for the tourism experience.

In 2030, there will likely be digitally enabled forms of tourism not yet possible to describe, created by the innovative start-ups and innovative minds including those relying on the collaborative economy. New tourism related business ideas will match users' demand and support a more resilient and sustainable ecosystem. Online services may become more important than physical services for some tourism SMEs, thereby reducing their dependency on the geographical location. Tourism enterprises would have access to the data they need as source for business intelligence and innovation at fair and equitable conditions.

In addition, technology should open new opportunities to create and disseminate tourism-related content and expanded audiences, e.g. of cultural and creative industries. Digitalised cultural offer (concerts, digital museum visit) would allow reaching new audiences and creating new interests in cultural tourism. Immersive technologies such as augmented reality, virtual reality, and extended reality may also have a radical impact in transforming cultural experiences.

Some of the possible developments that could support the above described future are proposed in the following table. The key questions for the stakeholders are:

- What other issues would you propose to be ambitiously considered for this pathway?
- What additional or different output scenarios for 2030 would benefit the digital development of the sustainable tourism ecosystem?
- 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?

⁶⁵ https://ec.europa.eu/growth/content/european-tourism-convention_en

⁶⁶ https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/european-data-strategy_en

⁶⁷ The Commission currently explores ways to improve business-to-business data sharing through model contract terms, a legislative fairness test and determining modalities for data access in situations where a data access right is established at sectoral level. The public online consultation can be found here:

https://ec.europa.eu/eusurvey/runner/Data_Act?surveylanguage=en

Issues*	Actions and possible divisions of roles	Possible output scenarios for 2030
Lack of data sharing among players to support data enabled solutions.	<p>Commission: supports implementing EU data legislation, such as Data Governance Act for the ecosystem, support the preparation with stakeholders of Code of Conduct on tourism data sharing; encourage and facilitate data sharing</p> <p>MS/Regions: could actively data provide available open national/regional tourism data</p> <p>Destinations: could support open data provision of destination data</p> <p>Industry: Could provide and make innovative use of data, explore the value added of Code of Conduct on tourism data sharing to implement EU's data legislations</p>	<p>Agreed data sharing practices for interoperable sharing of tourism data in a fair and equitable manner.</p> <p>Cultural Heritage data space enables new tourism demand and supply.⁶⁸</p>
Unfair practices in collaborative economy	<p>Commission: pursues a legislative initiative on short-term accommodation rental services, as announced in the SME Strategy</p> <p>MS/Regions: National implementation and monitoring of the regulatory framework for collaborative economy</p> <p>Industry: could promote and implement fair practices for peer and professional tourism service providers</p>	<p>Collaborative economy platforms facilitate and contribute to the development of a responsible, fair and trusted tourism economy mediated online</p>
Low level of digitalisation of Tourism Destinations	<p>Commission: supports digitalisation through Digital Europe, Next Generation EU, Cohesion Policy Funds</p> <p>MS/Regions: could actively implement digitalisation strategies and projects, implementation of National Recovery and Resilience Plans</p> <p>Destinations and industry: could actively install and provide digital services in tourism establishments</p>	<p>All tourism destinations, including rural areas, are covered by 5G⁶⁹;</p>
Need for advanced digitisation of cultural heritage	<p>Commission: supports cultural heritage digitisation (incl. 3D), and enhanced digital experiences for visitors, through a set of policy, coordination and funding initiatives</p> <p>MS/Regions: could implement digitisation strategies for cultural heritage, implement National Recovery and Resilience Plans to boost digitisation</p> <p>Destinations and industry: could actively promote enhanced cultural heritage experiences for visitors</p>	<p>3D digitisation of 50% of the highly visited cultural and heritage monuments, buildings and sites, and of cultural heritage at risk, and online availability for further use / reuse</p>
Low level of digitalisation of tourism SMEs	<p>Commission: Digital Innovation Hubs provide digital innovation support for tourism SMEs, together with funding from Digital Europe, Next Generation EU, Cohesion Policy Funds, Horizon Europe</p> <p>MS/Regions: could actively implement digitalisation strategies and projects, implement of National Recovery and Resilience Plans</p> <p>Industry: could actively collaboration with Digital innovation hubs and implementation of digital services dimensions</p>	<p>More than [95%] of tourism SMEs have reached at least a basic level of digital intensity;</p>

⁶⁸ SWD(2021) 15 final

⁶⁹ 2030 Digital Compass: the European way for the Digital Decade (COM(2021) 118 final) target

Inefficient best practice sharing to support digital innovations	<p>Commission: awards and showcases best practice destinations and projects (EDEN network, Smart tourism capitals)</p> <p>MS/Regions: could support national best practice networks on digitalisation, capitalising on Digital Innovation Hubs</p> <p>Destinations and Industry: could effectively reach out and collaborate</p>	<p>Almost all [90%] of tourism destinations will be part of, or in touch with, a community of practice or a network, either physical or digital, sharing knowledge on digital solutions for tourism</p>
Low levels of digital reskilling and upskilling of tourism SMEs	<p>Commission works with the industry to forge skills partnerships under the Pact for Skills</p> <p>MS/Regions: Digital Skills and Jobs Platform will function jointly with the 25 national coalitions for digital skills and contribute to reaching the EUs Digital Decade targets</p> <p>Industry: could actively implement re/upskilling programs of workers</p>	<p>Digital skills development approaches have reached [70%] of tourism workforce</p>
Insufficient knowledge base of the tourism ecosystem	<p>Commission: could identify data gaps to properly monitor the digitalization in the tourism ecosystem, and proposes new data to be collected, leveraging new data sources and the data generated by the tourism service providers.</p> <p>MS: could transpose the Commission guidelines to collect the needed data at high resolution and frequency, in a seamless and as much burden-free possible manner.</p> <p>Destinations and industry: could engage directly in the data transmission as per the MS guidelines.</p>	<p>Detailed and sound data and indicators concerning the digitalization of the tourism ecosystem are available in a timely manner, to identify issues and support policy.</p>

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3 SUPPORTING THE ECOSYSTEM IN TRANSITION AND LONG-TERM HORIZONTAL CHALLENGES

The tourism ecosystem will need a supportive framework at European, regional and local levels, and a commitment from industrial and other relevant stakeholders in order to work towards a common vision. This would include: enabling regulatory framework, financing of projects and activities, thematic stakeholder meetings, showcasing and sharing best practice, guidance and training, data and indicators, and awareness raising activities. These are necessary enablers for the ecosystem to transition.

3.1 Enabling strategic and regulatory framework

The work on developing the resilience of the tourism ecosystem is building on the Updated Industrial Strategy, which highlights the importance of creating a Single Market Emergency Instrument as well as deepening and monitoring the Single Market.⁷⁰ Steps are also taken to assess if the rules on package travel and passenger rights are still fully up to the task of ensuring robust and comprehensive consumer protection at all times. The Regulations on the EU Digital COVID-19 Certificate were adopted in June 2021 establishing interoperable certificates to facilitate free movement in the Single Market during the COVID-19

⁷⁰ COM(2021) 350 final

pandemic⁷¹.

Green Deal⁷² establishes a key framework for a sustainable tourism ecosystem. Of particular importance are: Sustainable and Smart Mobility Strategy⁷³, Sustainable Blue Economy Strategy⁷⁴, Circular Economy Action Plan⁷⁵, Renovation Wave for buildings⁷⁶, Biodiversity Strategy⁷⁷, EU Plastics Strategy⁷⁸, Farm to Fork Strategy⁷⁹, Long-term vision for Rural areas⁸⁰, European Climate Pact⁸¹, Zero Pollution Action Plan⁸², sustainable finance and taxonomy framework⁸³. The Fit for 55 package with its proposals expected in July 2021 for targeted amendments to Energy Efficiency and Buildings Directive, Energy Tax Directive and EU Emissions Trading System including maritime and aviation, as well as new initiatives on ReFuel Aviation and FuelEU Maritime, will contribute to the green transition of tourism ecosystem.

2030 Digital Compass targets⁸⁴ work towards digitalisation of all sectors, and provide concrete objectives for updating the skills and innovating data-enabled business models for the tourism SMEs. The Digital Markets Act tabled in December 2020 establishes a set of objective criteria for considering a large online platform as a so-called ‘gatekeeper’, in order to ensure fair competition opportunities to innovators and start-ups, and to provide a fairer business environment to all commercial players in the ecosystem. The Data Governance Act⁸⁵ (proposed on 25 November 2020) combined with the proposal for Data Act Package programmed for Q4 2021 will boost the trust in data transactions, and ensure fairness in the allocation of data value. Furthermore, to strengthen the EU tourism ecosystem, the Commission, as announced in the SME strategy, could propose a legislative proposal for improving the framework for short-term accommodation rental services⁸⁶. Tourism Statistics Regulation 692/2011 provides the legal basis for Member States to follow and submit data on tourism (accommodation, visits descriptors).

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

3.2 Financing of projects and activities

The Commission supports the transition of the Member States towards more green and digital tourism economies through various funding mechanisms. The most recent major funding

⁷¹ Regulation (EU) 2021/953 and Regulation (EU) 2021/954

⁷² COM/2019/640 final

⁷³ COM(2020) 789 final

⁷⁴ COM(2021) 240 final

⁷⁵ COM/2020/98 final

⁷⁶ COM/2020/662 final

⁷⁷ COM(2020) 380 final

⁷⁸ https://ec.europa.eu/environment/strategy/plastics-strategy_en

⁷⁹ COM/2020/381 final

⁸⁰ https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas_en

⁸¹ https://europa.eu/climate-pact/index_en

⁸² COM(2021) 400 final

⁸³ https://ec.europa.eu/commission/presscorner/detail/en/ip_21_1804

⁸⁴ COM(2021) 118 final

⁸⁵ <https://digital-strategy.ec.europa.eu/en/library/proposal-regulation-european-data-governance-data-governance-act>

⁸⁶ As announced in the COM(2020) 103 final

possibilities released under Recovery and Resilience Facility specifically call for 37% of investments towards climate objectives and 20% for digitalisation. Under these investments, Member States may target actions towards supporting modernising the tourism ecosystem, increasing the resilience as well as upskilling and reskilling. Member States are also encouraged to integrate Cohesion policy funds support for tourism into broader strategies (where relevant) including territorial and local development strategies, Smart Specialisation Strategies and Territorial cooperation strategies. The Commission also supports Member States in implementing reforms for a sustainable, resilient and digital tourism by providing technical support through the Technical Support Instrument.

In addition, the Commission makes available for the Member States and for the tourism industries funds under several programs, summarised under Guide on EU Funding for Tourism⁸⁷. Specifically, the Single Market Programme will through its yearly Work Programmes empower and support SMEs in carrying out the green and digital transition. Horizon Europe supports research and innovation activities on tourism to promote the emergence and scale-up of innovations and innovative practices. The Commission designs Work Programmes to call for relevant projects to contribute to the development of innovations and capacities towards the green and digital transition, and to receive policy feedback from their implementation. Furthermore, since 2021, DiscoverEU⁸⁸ has been integrated into the Erasmus+ Programme, which will allow more than 700,000 young people, aged 18, to travel and explore Europe.

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

3.3 Showcasing and sharing best practices

The Commission awards yearly destinations with sustainable and innovative tourism practices through two initiatives: European Capital of Smart Tourism⁸⁹ for cities with populations over 100,000 and European Destinations of Excellence⁹⁰ for destinations with populations between 25,000 and 100,000 inhabitants. All the members of these networks should be encouraged to show good examples of the green and digital transition actions and commitments.

In addition, preliminary stakeholders' feedback shows that the EU, Member States and the industry should value sustainability in all their funding, promotion and organisation activities. The Commission will explore the creation of funding opportunities under its Programmes such as LIFE, Single Market Programme, or Horizon Europe, for entities that have, for example, EMAS or EU Ecolabel certification, or similar. In the framework of the future communication on greening the Commission, the Commission will explore how to make ecologically certified hotels and accommodations the default choice for staff on mission and for organising meetings and events.

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

⁸⁷ https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

⁸⁸ https://europa.eu/youth/discovereu_en

⁸⁹ https://smart-tourism-capital.ec.europa.eu/index_en

⁹⁰ https://ec.europa.eu/growth/sectors/tourism/eden_en

3.4 Guidance, training and support

Under the EU Pact for skills, the tourism section will establish a skills partnership to promote joint action by public and private organisations to maximise the impact of investing in improving skills in green and digital tourism. The actors of the tourism ecosystem will also benefit from the new Digital Skills and Jobs Platform⁹¹, which will function jointly with the 25 national coalitions for digital skills and contribute to reaching the EUs Digital Decade targets. For the uptake of digitalisation and technology in general, the Digital Compass⁹² makes use of over 200 Digital Innovation Hubs, who support digital transformation of SMEs across the EU.

In the area of sustainability, skills and awareness raising is needed especially in informing about the concrete means of including sustainability objectives in the tourism businesses. Advice is needed on the applicable sustainability schemes for different sectors of the tourism ecosystem, as guidance for the tourism SME in starting their path towards more sustainable practices. EEN sustainability advisors and supporting actions could provide specific support on sustainability approaches (indicators, certification schemes, environmental footprint calculation) for SMEs on different sectors of the tourism ecosystemsectors⁹³

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

3.5 Tourism statistics and indicators

To support the ecosystem in its transition, it is important to have data and indicators on progress. This requires developing key performance indicators relevant for the different sectors and the overall tourism ecosystem. Currently, the Tourism Statistics Regulation 692/2011 defines the legal basis for MS data collection on tourism. To allow for a coherent, consistent and comparable statistical scoping, an essential task will be to delineate statistical definition of the tourism ecosystem, preferably aligned to existing commonly agreed international references⁹⁴.

Additionally, the Member States voluntarily contribute to gathering Tourism Satellite Accounts data, and the Commission has reached an agreement with Airbnb, Booking, Expedia Group and TripAdvisor relating to the publication of statistics on short-term accommodation rentals. Following the Council Conclusions of 27 May⁹⁵, the Commission is developing with the Member States a Tourism Dashboard, which will support tracking the different dimensions of the transition, and expand traditional tourism statistics towards monitoring sustainable, digital and resilient tourism ecosystem. The Dashboard development, which will include data beyond the traditional tourism statistics, will go hand in hand with and provide input for the Eurostat initiative to revise and update Regulation 692/2011. The Dashboard

⁹¹ <https://digital-strategy.ec.europa.eu/en/news/digital-skills-and-jobs-platform-one-stop-shop-close-europes-digital-skills-gap>

⁹² 2030 Digital Compass: the European way for the Digital Decade

⁹³ SME strategy calls for EEN sustainability advisors, and setting up a tourism specific helpdesk could be developed through a Coordination and Support Action under the SMP Work Programme Call 2021

⁹⁴ In this respect, see the [International Recommendations on Tourism Statistics \(IRTS 2008\)](#), the [Tourism Satellite Accounts Recommended Methodological Framework \(TSA:RMF\)](#) and [data on tourism industries](#) annually published by Eurostat based on Structural Business Statistics and Short-term Business Statistics.

⁹⁵ <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>

work will also contribute to the international work on developing sustainable indicators for the tourism sector and measuring global progress towards SDG Target 12.b.

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

3.6 Tourism-related taxation initiatives

The Action Plan for fair and simple taxation⁹⁶ supporting the recovery strategy sets out a number of VAT initiatives of particular relevance for the tourism ecosystem. The modernisation of the special scheme for travel agents and the review of passenger transport rules are both planned for 2023. They will help this sector go through the digital and green transitions, simplify compliance with VAT rules and improve competition within the EU. Moreover, tourism enterprises could also benefit from other initiatives laid down in that Action Plan, including a further extension of the VAT One Stop Shop arrangements and adapting the VAT rules to the platform economy. More generally, the Commission is promoting broader tax reforms as part of the Recovery and Resilience scheme, to shift taxes from labour to pollution, which would also support the industry's transition to more sustainable practices.

All such initiatives are subject to the results of an impact assessment.

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

3.7 Awareness raising and communication

A very important part of the transition towards a more resilient and sustainable tourism ecosystem is the awareness and interest of the travellers and tourists themselves. This will be supported by the incorporation of sustainability in the educational curriculum, to ensure that the young generation grows up aware of the value of sustainably responsible practices⁹⁷.

The Commission is supporting the European Tourism ecosystem by awareness raising and promotion campaigns, e.g. 'Open-up to Europe' in summer 2021. European Climate Pact facilitates knowledge exchanges, promotion of forerunners, etc.⁹⁸

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

⁹⁶ <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12233-Action-Plan-on-fight-against-tax-fraud->

⁹⁷ At the end of 2021 the Commission will propose a Council Recommendation on education for environmental sustainability and a European Competence Framework for Climate Change and Sustainable Development.

⁹⁸ https://ec.europa.eu/clima/policies/eu-climate-action/pact_en

3.8 Thematic stakeholder meetings and governance

The Commission services will ensure that the co-creation process for the Tourism Transition Pathway will continue through structural interaction with stakeholders on the cross-sectoral topics of the tourism ecosystem. Specific platforms on digitalisation (Digital Tourism Network) and sustainability (European Sustainability Platform) will be revived and created. The green and digital transition of the tourism ecosystem will be supported by Industrial Forum, which will also provide oversight over the transition process.

Thematic cluster meetings for the ongoing projects under different funding programmes will also provide opportunities for exchanging recent knowledge on policy objectives, project implementation, and supporting the projects in cross-fertilising innovation. These cluster meetings can include also stakeholders, to exchange best practices and feed into innovations for the green and digital transition.

Question for the stakeholders: What more or different would be needed in order to support the transition towards 2030 from each of the Commission, Member States, the industry and other stakeholders?

4 CONCLUSIONS AND AN INVITATION TO THE STAKEHOLDERS

This paper has proposed scenarios of how the recovery from the COVID-19 crisis would optimally lead into a greener, digital and more resilient tourism ecosystem. In order to reach the vision for 2030, a lot needs to happen.

The vision can only be reached if the different sectors of the tourism ecosystem and their diverse actors work together. This paper invites the stakeholders, large and small, public and private, to work together and propose concrete actions, commitments and investments that could be implemented at sectoral, national and regional levels of the tourism ecosystem towards a common vision. Stakeholders are also invited to provide an assessment of scale, cost, long term benefits and conditions of the required actions to accompany the twin transition of the tourism ecosystem.

Key issues and questions on them have been presented in this document under different sections. Stakeholders are invited to reflect on the proposed issues and questions with regard to their sector. Concrete responses, proposals and commitments from tourism stakeholder networks and organisations will be welcome by 15 September 2021 through online consultation.

Vision dimension	National and regional tourism authorities	Sectors of the Tourism ecosystem	Tourism associations and platforms	Consumer associations
Resilient tourism Greener tourism Digital tourism	- National/regional objectives - MS / regional commitments	- Sectoral objectives - Industry pledges	- Destination-level objectives - Destination network pledges	- Consumer objectives - Network pledges

Our shared ambition should be to maintain Europe as the world's leading tourist destination in terms of value, quality, sustainability and innovation.⁹⁹ This could not be achieved by the Commission, Member States and other stakeholders acting on their own. The key for the tourism recovery is collaboration and a forward-looking responsible attitude. All together, we need to think beyond the coming season and build back tourism activities in socially, economically, ecologically and culturally sustainable manner, ensuring we leave no one behind. The EU Agenda for Tourism must go further. We have the momentum of the recovery, the need for change driven by citizens, the awareness of Member States and the availability of EU funds. Let's make it happen, together.

⁹⁹ COM(2020) 550 final

ANNEX: TOURISM TRENDS AND PARADIGM SHIFTS

Already before COVID-19, the tourism market was changing, with new trends stabilising among the travellers. Some of the most visible trends include appreciation of sustainable options, authentic experiences, digitally mediated personalised holidays, health tourism and active holidays.

- **Sustainability.** According to the 2019 edition of booking.com's annual sustainable travel report, over half (55%) of global travelers reported being more determined to make sustainable travel choices than they were a year ago, but barriers included a lack of knowledge and available or appealing options when trying to put this into practice. Almost three quarters (72%) of travelers believed that people need to act now and make sustainable travel choices to save the planet for future generations. The appreciation of nature has been also shown in the growing interest on active and nature holidays: cycling, walking, hiking, diving, or yoga retreats. The responsible role of tourism becomes a distinctive factor in these activities, which can either appreciate and support the biodiversity of the destinations or overcrowd and cause damages to the nature.
- **More authentic and 'slow' holiday experiences.** While tourists have been getting interested in lesser known destinations, small destinations and rural destinations, the focus on mass holidays and group tourist packages has been changing. Tourists look for 'slow' or 'authentic' holidays, search to 'live like a local', and appreciate local culture in new ways. In addition to traditional cultural 'sites', museums and libraries, local arts and immersive experiences in intangible cultural heritage such as festivals, traditional practices, crafts and skills have become new forms of cultural tourism, where visitors search for connections with local communities.
- **Digitally mediated personalized tourism.** Tourism trips are increasingly planned and booked online by the travelers themselves, using online travel platforms. The European Travel Commission (ETC) survey from February 2021 showed that 45.5% of tourists use online booking engine in planning their travel. 17.7% use travel review websites as source of information when making their travel planning decisions. Increasingly, collaborative economy platforms also mediate 'experiences' such as local tours, crafts classes, guided participation in local events, food tastings etc, enabling travellers to book travel experience 'packages' in a personalized manner.
- **Health tourism.** According to the UN World Tourism Organisation (UNWTO), health tourism, intended as wellness and medical tourism, is growing at rapid pace¹⁰⁰. Indexes from the industry rank 6 EU Member States among the top forty destination countries for health tourists (Spain, France, Germany, Italy, Malta and Poland), based on an aggregation of sustainability indicators, medical tourism demands, and quality of facilities and services. Medical tourists spend 5 to 10 times more than normal tourists, they travel accompanied, and stay an average of 2 to 3 weeks in the country.
- **Silver economy and tourism.** The older generation is emerging as a new interest group for travelling and tourism, as a new target market. There are older people with time, interest and funds to travel into other countries after their retirement, as well as a persons with more restricted budget but interest to participate in the cultural and recreative offers

¹⁰⁰ UNWTO and ETC 'Exploring Health Tourism' report, 2018

in their home country. As older people may have different expectations and interests from the younger tourists while travelling or visiting tourism attractions and destinations, good understanding of their needs and preferences is becoming extremely important for silver tourism providers, especially because Europe has good potential to become the biggest actor in the silver tourism market.

Post-pandemic trends – a first assessment

How the tourism ecosystem develops post-COVID-19 will depend to a large extent on what tourists expect and on the capacity of the tourism ecosystem to adapt and deliver. Studies point towards two different possible developments: on the one hand, a higher sensitivity and demand for sustainable tourism and a decreased interest in mass tourism, and on the other hand there is evidence of a return to the ‘old normal’ after the crisis is over. In both cases, COVID-19 has sharpened the trends that diversify the tourism experience, thereby putting pressure on governments, destinations, industry and EU institutions to fine-tune their understanding and management of these trends.

- **Changed forms of business travelling.** The push for teleworking and online meetings due to COVID-19 mobility limitations has reshaped the way to work across the Europe and the world. The ETC travel sentiment survey shows a low likelihood of business travel in the next 6 months. It is likely that after the deep low of business travelling, some forms of it will be returning again, especially events such as trade fairs which can play important role for creating new connections between enterprises. The increased possibilities to telework from anywhere may be providing new demand that combines business and personal travelling, and therefore will highlight the demand for good internet connectivity of the destinations and accommodations.
- **Increased proximity tourism.** COVID-19 reduced the possibilities to travel by air, and Europeans used this moment to rediscover proximity tourism and alternative modes of transport. During 2020, domestic tourism was more resilient than intra-EU tourism, and in the short-term and until global travel markets resume fully, it will be key for driving recovery in the tourism ecosystem. The ETC study on European Tourism trends and prospects¹⁰¹ proposes that domestic tourism will be leading the way to recovery, with volumes projected to reach 2019 levels in 2022.
- **Diversified tourism experiences.** The megatrends pre-existing COVID-19 will likely accelerate, highlighting the increased use of digital means and online tourism offer to diversify the tourism experience towards personal interests and decisions. New personalised tourism packages will need to take into account the diverse interests of the travellers, offering options for those interested in sports, nature, culture, gastronomy, and interacting with local communities. The ETC survey results from February 2021 demonstrate the variety of tourist interests: 20.9% of travellers head for ‘sun & beach’, 14.8% go for ‘nature & outdoors’, 13.1% for ‘coast and sea’, 13% for ‘culture & heritage’, 12.3% for ‘city break’ and 10.2% for ‘wellness and relaxation’.
- **Digital media created tourism interests.** During the pandemic, technology has opened new opportunities to create and disseminate tourism-related content and expanded audiences, e.g. of cultural and creative industries. For example, in the first 6 months of

¹⁰¹ [European Tourism 2021 – Trends & Prospects \(Q1/2021\) - ETC Corporate \(etc-corporate.org\)](https://etc-corporate.org/2021/01/european-tourism-2021-trends-prospects-q1-2021/)

2020, due to the global lockdown measures, Netflix added almost 26 million subscribers. It is possible that the European destinations that have provided sets for shows with globally wide audience will experience a surge of visitors after the pandemic. Digitalised cultural offer (concerts, digital museum visit) will also have reached new audiences and created new interests in cultural tourism.

- **New expectations on public health and hygiene.** After COVID-19, people will pay more attention to health and hygiene, in their own practices and in their expectations for tourism establishments and travel services. Perception of health risks and care options may also impact their selection of travel destinations. The ETC survey from February 2021 shows that 21.2% of travellers considered 'health and safety' among the top qualities for their holiday. The number is down 10% from the previous survey, but it is likely that this trend is there to stay. Regarding personal health and safety, air travel was considered as most worrisome part of travelling. Over 2/3 of travellers expressed feeling reassured when travelling to places with strict health and safety protocols.
- **New tourism hotspots.** The COVID-19 pandemic has shifted the trend towards demand or proximity-based tourism, less crowded destinations in nature, and the open air. Some, partly new, destinations were reported by the media to be confronted with overtourism. These developments indicate a relocation of the overtourism problem to destinations, which have rarely experienced such a rapid increase or accumulation of visitor numbers before. It is important to monitor and manage this trend in order to avoid creating new sustainability and resilience problems while relieving old ones.