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Stakeholder Consultation Report

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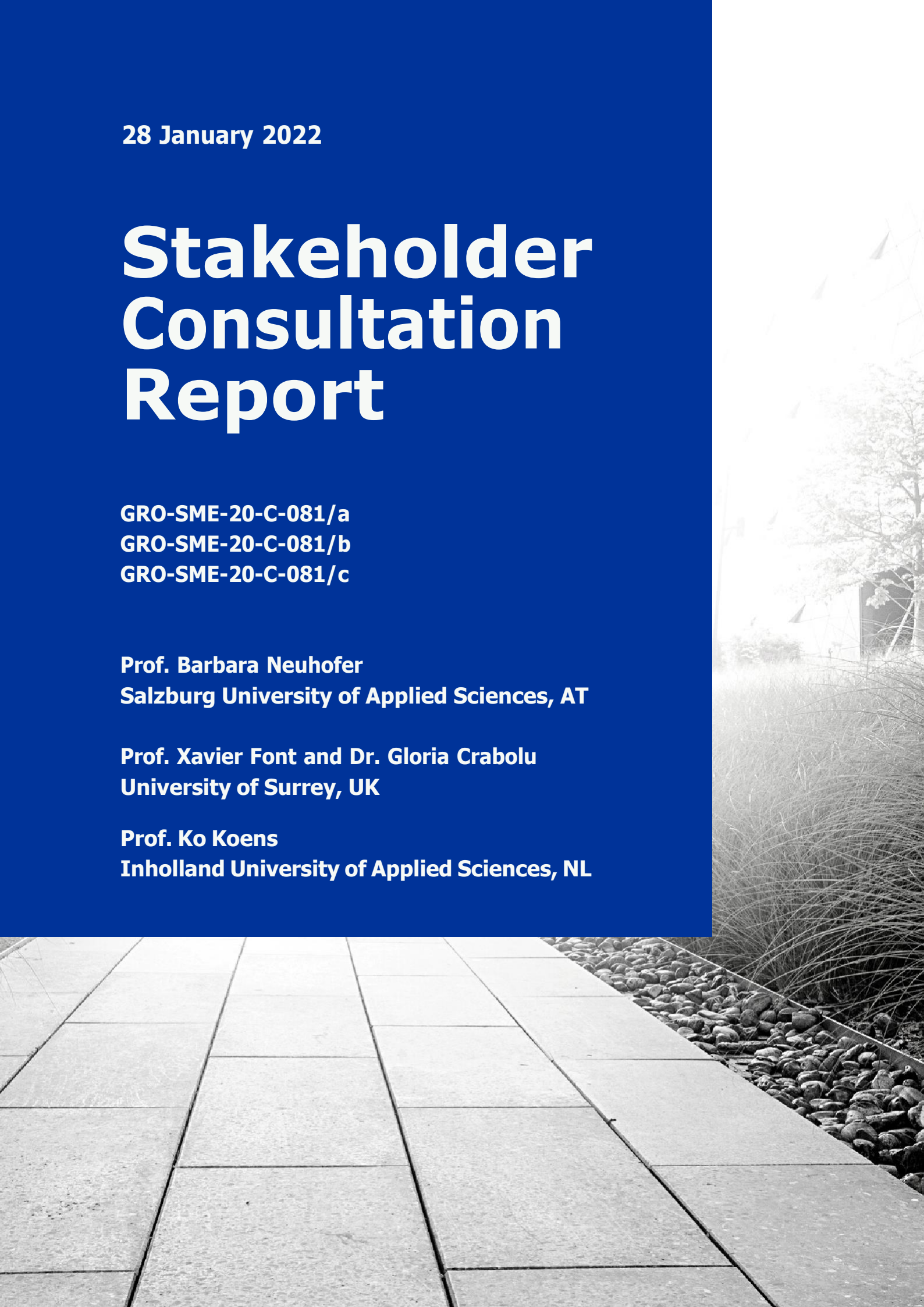


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CO-CREATION OF A TRANSITION PATHWAY FOR TOURISM, FOR A MORE RESILIENT, INNOVATIVE AND SUSTAINABLE TOURISM ECOSYSTEM.

Introduction

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

The present document is a result of an extensive co-creative consultation process with stakeholders across the tourism ecosystem and the EU Member States, a part of the transition pathway co-creation. This document presents actions that gathered support from stakeholders, but is not an exhaustive repository of everything discussed. The advised actions do not necessarily represent the position of all stakeholder groups, nor the position of the individual Member States or the European Commission. The results from the consultation show that cross-stakeholder collaboration is essential for reaching ambitious targets by 2030, which require immediate and substantial efforts from all, in order to give European tourism the opportunity of a prosperous future for all.

The stakeholder consultation process was launched by the Staff Working Document on possible scenarios for transition¹, inviting tourism stakeholders to contribute with their responses and reflections to specific questions. 182 stakeholders responded through an online survey and ten by email (June-September 2021) and these results were used to structure discussions in 12 workshops, which were attended by 115 stakeholders (October 2021). Based on these inputs, an initial set of transition pathway topics, targets and actions were devised. To validate these, a second round of three workshops was organised, for which all participants were invited. Over 90 stakeholders participated in this validation process. These outputs were then further discussed with two rounds of consultations with Member States experts and members from the Council Working Party on tourism. Figure 1 illustrates in detail the five stages of consultations held from June to December 2021. The overall discussion themes were led by tourism experts for the Green Transition (Prof. Xavier Font and Dr. Gloria Crabolu), Digital Transition (Prof. Barbara Neuhofer), and the Resilient Transition (Prof. Ko Koens).

This final consultation report structures the results of the stakeholder discussions under five themes and 17 transition pathway topics considered as being of high importance by stakeholders. For each of these topics, targets for 2030, and milestones in 2023 and 2025 have been proposed. These targets are aligned with existing initiatives with relevance for tourism actors and developed based on the discussions with the stakeholders. The assessment approaches of measuring these targets are

¹ SWD(2021) 164 final

outlined, together with a series of proposed actions and indications of potential costs to implement them for different stakeholder levels, including the European Commission, Member States and Regions, Local Authorities, Destination Marketing & Management Organisations, as well as the Tourism Industry (including Small and Medium-Sized Enterprises). It is worth noting that the proposed targets are set at the European level and are not directly comparable with or representative of targets set at national, regional and destination levels. They will be achieved with the joint effort and collaboration of different stakeholders, taking into consideration their different capacity, infrastructure, and development levels. The proposed actions and indications of costs are general indications for each stakeholder level of what may be needed to achieve the proposed 2030 targets.

The actual feasibility and scope of each action must be considered on a granular level, depending on the size (e.g. small, medium, large), and the geographical context. In particular, the realities of different territories set different starting points and possible limitations to which actions are implementable, especially regarding mobility and connectivity (e.g. considering islands, remote/peripheral regions, rural regions, densely populated urban environments). The implementation and assessment of objectives, actions and follow-up should always consider the specificities of the territory.

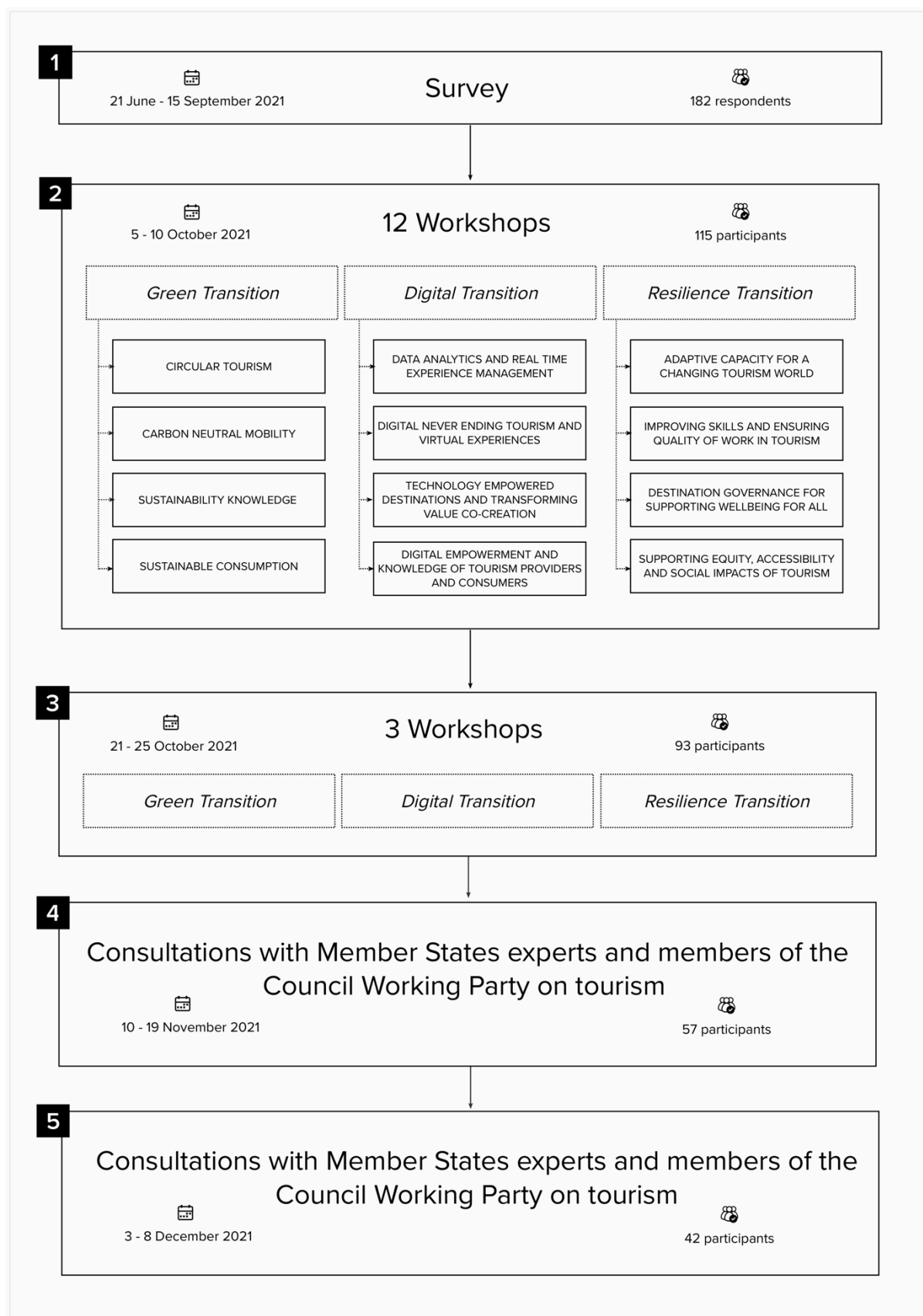


Figure 1 Summary of the Consultation Process

The general feasibility of reaching the desired outcomes for the topics is presented in three bands (A, B and C from highest to lowest), as assessed by the key stakeholders that participated in the 15 stakeholder workshops (see Table 1 for a summary). It is worth noting that the benefits, actions and funding sources are not exhaustive but indicative of the work that leading stakeholders can do in order to contribute towards the European tourism ecosystem meeting the proposed targets.

Table 1 Breakdown of feasibility levels of the transition pathway topics

Feasibility Level	Transition Pathway Topic
A	<ul style="list-style-type: none"> Sustainable data collection framework Reducing tourism transport GhG emissions Reducing single-use plastic Minimising food waste Measuring and reporting environmental footprint Training and upskilling of the workforce
B	<ul style="list-style-type: none"> Smart and sustainable Tourism Strategies Fair policy framework for collaborative platforms Collaborative destination governance Improving energy efficiency in buildings European tourism data space Digital Information of tourism offer for informed decision making Real-time management of destination and tourism SMEs Digital capacities of destinations and tourism SMEs Equality and good quality of tourism jobs
C	<ul style="list-style-type: none"> Virtual technologies for tourism services Tourism services and facilities accessible to all

This document is not an official Commission document, and it does not present the Commission's position nor any endorsement for the targets and actions included in the document. All targets and actions presented in this document will need further examination in the light of existing EU legislation, international commitments and feasibility/practicality. The objective of this document is to contribute to the creation of a Transition Pathway, and ultimately to a common work plan (agenda) for EU tourism by providing key input elements based on stakeholder consultations.

Glossary and Abbreviations

Table 2 provides an overview of the most used terms, their abbreviations and a definition.

Table 2 Glossary and abbreviations

Term	Abbreviation	Definition
European Commission	EC	European Union governing body responsible for proposing legislation and administrative operations (e.g. Launch, consultation, organisation and follow-up of Tourism Transition Pathway)
Member States	MS	European member state countries
National Statistical Institutes	NSI	Institutes on a national level that provide statistical information on the demographic and socio-economic conditions
Regions		Governing authorities on a regional level in each country
Destination Marketing & Management Organisations	DMMO	Tourism organisations responsible for promoting the assets of the destination, creating a brand and organising activities for tourism stakeholders. These organisations are increasingly taking on more responsibilities for industry training, management and planning. DMMOs exist on a local, regional and national level. In this report, the reference to them is made typically on a local level.
National Tourism Organisation	NTO	Tourism organisation on a national level responsible for promoting the nation's tourism and coordinating with regional and local DMMOs
Local authorities		Governing authorities on a local level in each region
Small and Medium Sized Enterprises	SME	Tourism businesses on a small and medium-sized level

1 Enabling policy framework and governance

1.1 Smart and sustainable tourism strategies

Feasibility level: B

A recent report from the UNWTO and UN ENVIRONMENT² showed that 100% of tourism strategies mention sustainable tourism nowadays, but only 55% go beyond making a cursory reference to it. The same report shows how the organisational mandates of tourism management organisations are often narrowly defined to promotional activities, their key performance indicators do not reflect the different aspects of sustainability, and the percentage of human and financial resources dedicated to sustainability related management actions is low. For the European tourism ecosystem to transition towards a greener, more innovative and resilient ecosystem, it is essential that national tourism administrations and Destination Marketing and Management Organisations (at national, regional and local levels) update their strategies and reporting mechanisms. These should take into account the principles of sustainable development, considering economic, environmental, social, resilience and governance related actions, informed by transparent resident consultations, with specific support plans for SMEs and considerations for possible crisis management needs. In addition, the development of cross-border macro-regional strategies should be encouraged, to support twin transition in cross-border regions.

In line with this, the European Parliament published a resolution in March 2021 where it asked for the Commission to establish a new EU strategy for sustainable and strategic tourism that is aligned with the Digital Agenda, the Green Deal and the UN Sustainable Development Goals, in order to replace the strategy from 2010³. The Council conclusions in May 2021⁴ requested the Commission to propose an outline for EU Agenda for tourism 2030. The discussions in the informal ministerial meeting under the Slovenian presidency confirmed that many European Member states already have national tourism strategies where sustainability plays a key role, and they support having a European framework that supports Member states and other tourism stakeholders while the European Commission plays the role of the facilitator and coordinator. In addition, the European Cohesion Policy 2021-2027⁵ supports multilevel governance and cooperation in cross-border contexts, thus helping towards the development of strategies at a macro-regional level.



² UNWTO and UN ENVIRONMENT (2019). Baseline report on the integration of sustainable consumption and production patterns into tourism policies, Madrid, UNWTO. Available at <https://www.unwto.org/publication/Baseline%20Report%20on%20SCP>

³ European Parliament (2021). Resolution on Establishing EU Strategy for Sustainable Tourism, Brussels, 25 March 2021. Available at https://www.europarl.europa.eu/doceo/document/TA-9-2021-0109_EN.pdf

⁴ Council of the European Union (2021). Tourism in Europe for the next decade: sustainable, resilient, digital, global and social, Brussels, 27 May 2021. Available at <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>

⁵ European Commission (2021). Cohesion Policy. Available at https://ec.europa.eu/regional_policy/en/2021_2027/

Measurement of targets:

- The target of 2023 could be assessed based on the existence of such a common guidance.
- The targets of 2025 and 2030 could be assessed with a survey of national and regional authorities, with ETC, TAC and NECSTouR

Advised Actions	Cost/ Conditions
European Commission	
<ul style="list-style-type: none">• To co-create and share guidance on developing sustainable tourism strategies on national, regional and destination levels with specific considerations on regions with specific contexts (e.g. islands, remote areas and the outermost regions);• (in collaboration with other actors) to encourage the inclusion of climate change adaptive tourism in the strategy design in alignment with ecological tourism and climate mitigation activities, following the new guidance on Tourism and Natura 2020; the new approach for a sustainable blue economy in the EU, and including synergies with the Cultural and Creative Industries;• To commission a study to survey and analyse national and regional sustainable tourism strategies including nature-based tourism and climate-change adaptive tourism.	<ul style="list-style-type: none">• Resources to develop guidance documents and facilitate best practice exchange (€300,000 once).• Resources to survey and analyse sustainable tourism strategies in the EU MS and regions (€25,000 per annum).
Member States/Regions and Local Authorities	
<ul style="list-style-type: none">• To continue adopting Sustainable Tourism Strategies considering guidance and best practices shared at the European level while taking into account local specificities⁶• To develop cross-border and macro-regional strategies on functional areas such as coastal and maritime tourism to ensure that strategy covers entire touristic areas across borders.• To capitalise on Smart Specialisation Strategies (S3) in developing innovative sustainable tourism.	<ul style="list-style-type: none">• Resources to reskill current staff and to contract new staff with sustainability expertise, to develop and implement Sustainable Tourism Strategies at all levels (€25-50,000 once).• Staff time to analyse key trends and development needs for tourism, as a basis for strategy development and update• Resources for pilot projects to support and promote experimenting sustainability strategies with adaptation and mitigation of climate change, for example in island environments (this can be done from small scale efforts costing €10,000s to integrated comparative tasks through for example Interreg funding, raising €100,000s).

⁶ For climate adaptation actions in the tourism sector, see section 2.7 from

Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • Follow the established National/Regional Sustainable Tourism strategy and regularly report on their performance against economic, environmental, social and governance targets to the relevant authorities; • To analyse the strengths, weaknesses, threats and opportunities of the destination in the light of new tourism trends and develop a local action plan in collaboration with stakeholders; • To establish public-private co-operation initiatives to implement mitigation and adaptation measures for climate change and nature protection with regards to tourism 	<ul style="list-style-type: none"> • Resources to reskill current staff (€10,000 once) and to contract new staff with sustainability expertise (€20-50,000 per annum). • Resources to develop mechanisms to collect information on economic, environmental, social and governance targets, or apply national monitoring schemes or third party recognised destination labels (e.g. GSTC) (€5-20,000 per annum). • Resources to analyse needs and develop locally adapted action plans for sustainability strategy with a collaborative approach (€20,000 once).
Industry	
<ul style="list-style-type: none"> • To allocate resources to sustainability tasks, to develop and implement action plans to at least adhere and where possible surpass the National/Regional Sustainable Tourism strategy. • To show leadership in sustainable tourism practices showing a clear business and ethical case for sustainability • To participate in co-creating destination and industry association strategies. 	<ul style="list-style-type: none"> • Human and financial resources to develop and implement sustainability practices. (staff time in small firms, or the salaries for 1-5 members of staff for larger firms). • Human resources to engage with other stakeholders at destination level to co-create and implement destination level sustainability strategy (primarily time from current staff).

1.2 Sustainability data collection framework

Feasibility level: A

The need for a coherent framework that systematically collects and shares sustainable tourism knowledge through its stakeholders has been widely acknowledged in a variety of reports^{7,8}, as well as by different stakeholder groups who participated in the consultation process. At present, various tools across Europe exist⁹, including a proposal by the European Commission on European Tourism Indicator System¹⁰. While they have provided the basis for tackling the lack of sustainable tourism data, they have also created a scattered system that risks causing confusion amongst stakeholders that are just starting their sustainability journey and very limited^{Error! Bookmark not defined.} impact on policy and sustainability improvement¹¹. A common framework is required that produces a complete picture of sustainable tourism across different system levels - European, National, Regional and Destination, and leads to policy and sustainability change. These sustainability indicators should aim at showing progress of countries vs. baseline year, rather than having absolute targets or comparisons between countries as their situations are different. Their implementation should be linked with existing systems and minimise the additional burden for data generating or collecting actors.

Currently, the Tourism Statistics Regulation 692/2011 defines the legal basis for Member States on data collection on tourism. In addition, Eurostat in collaboration with the National Statistics Institutes collects other types of tourism data, such as Tourism Satellite Accounts¹², information on short-term rental platforms¹³, and develop innovative new data collection mechanisms. Based on the Council Conclusions of 27 May⁴ the Commission is developing a Tourism Dashboard, which expands the traditional tourism statistics towards monitoring the sustainability, digitalisation and resilience aspects of the tourism ecosystem. The dashboard shows examples of how Eurostat statistics on environmental aspects combined with other available European level sources can be used to visualise sustainability relevant indicators, such as emissions, energy, tourism seasonality and intensity.



⁷ Font, X., Crabol, G., Melenez, J., Ruhual, M., (2020). Measuring tourism sustainability in destinations, Impulse Paper prepared for the DG Internal Market, Industry, Entrepreneurship and SMEs, Unit GROW F4 - Tourism, Textiles and Creative Industries. Impulse Paper

⁸ UNWTO (2018). Statistical Framework for measuring the sustainability of tourism, Madrid. Available at https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-09/wge_mst_2nd_item_2.1_doc_0.pdf

⁹ BEST MED (2020). Deliverable 3.1.1: Diagnosis - State of the art on collection and management of tourism data. Available at https://interreg-med.eu/fileadmin/user_upload/Sites/Governance/Projects/BEST_MED/D.3.1.1_Diagnosis_State_of_the_art_on_collection_and_management_of_tourism_data.pdf

¹⁰ European Tourism Indicators System for sustainable destination management https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en

¹¹ Font, X., Torres-Delgado, A., Crabol, G., Palomo Martinez, J., Kantenbacher, J., & Miller, G. (2021). The impact of sustainable tourism indicators on destination competitiveness: the European Tourism Indicator System. Journal of Sustainable Tourism, 1-24. <https://doi.org/10.1080/09669582.2021.1910281>

¹² Eurostat (2019). Tourism Satellite Accounts in Europe. Available at <https://ec.europa.eu/eurostat/web/products-statistical-reports/-/KS-FT-19-007>

¹³ European Commission (2021). New EU short-stay statistics from collaborative economy platforms, 29 June 2021. Available at https://ec.europa.eu/growth/news/commission-eurostat-publishes-first-statistics-short-stay-accommodation-booked-collaborative_en

Measurement of targets:

- The target for 2023 could be assessed based on the evidence of actions taken by the European Statistical System, Joint Research Center, and European destination networks on developing sustainability indicators.
- The target of 2025 could be assessed based on study which analyses the coverage of national, regional and destination level indicators on sustainability
- The target of 2030 could be assessed through surveying national tourism strategies

Advised Actions	Cost/Conditions
European Commission	
<ul style="list-style-type: none"> • To work with the European statistical system to identify core sustainable tourism indicators and establish common framework with maximum alignment with existing practices, considering also international statistical approaches such as UNWTO and OECD • To explore available new data sources with European coverage for sustainability relevant aspects to be embedded in the EU Tourism Dashboard. • Support peer learning platform to support data interpretation, exchange of experiences and policy learning 	<ul style="list-style-type: none"> • Support for national statistics institutes and their collaboration with authorities responsible on sustainability development to develop sustainability indicators through the Technical Support Instrument (€500,000 once, plus ongoing staff support); • Resources for EU Tourism Dashboard development (€50,000 once, plus ongoing staff support); • Resources for stakeholder collaboration/peer learning platform that supports data and policy learning on all levels (€50,000 once, plus ongoing staff support).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • National and regional statistics institutes to collaborate with the EC, authorities responsible for sustainability on MS/regional level and other relevant institutions in the development and implementation of the common framework of sustainable tourism indicators; • To support peer learning on sustainability data collection and understanding across regions and destinations. 	<ul style="list-style-type: none"> • Resources for national statistics institutes to collaborate with EC and destinations on developing sustainability indicators collection (ongoing staff support from NSIs). • Peer learning programme can range in costs depending on the scale (assume one full time member of staff or outsourced at €50,000 per annum). • Subsidy in labels (e.g. for EU Ecolabel €200/€600 for SMEs for application fee + variable annual fees).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To collect sustainable tourism indicators based on the common framework • To take action based on indicator data to reduce impacts; • To use peer learning platform to exchange knowledge and experiences across destinations 	<ul style="list-style-type: none"> • Resources for Destination Marketing and Management Organisations (national, regional and local) for sustainability monitoring (assume 1 full time

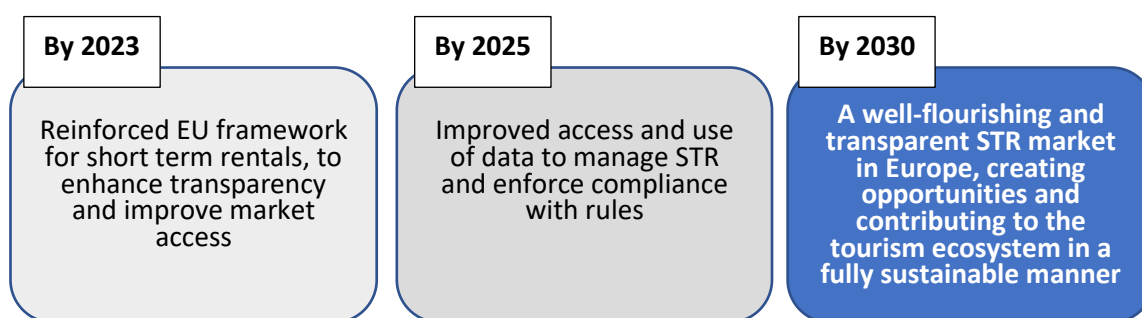
	member of staff or outsourced at €50,000 per annum).
Industry	
<ul style="list-style-type: none"> • To innovate methods to collect and provide sustainability data as by-product of business processes (without additional effort burden for the company) • To enrol in EMAS, the EU Ecolabel or internationally recognised third party validated labels (e.g. GSTC) or national schemes that contribute to measuring and reporting sustainability data. 	<ul style="list-style-type: none"> • Investment in labels (e.g. for EU Ecolabel €200/€600 for SMEs for application fee + variable annual fees + staff time cost).

1.3 Fair policy frameworks for short-term rental platforms

Feasibility level: B

Digital developments have enabled the rise of peer-to-peer online platforms and sharing services, creating new jobs and income, as well as new travel opportunities for tourists¹⁴. The online collaborative economy had a significant impact on the tourist accommodation market in the past decade. In 2019, travellers spent over 554 million nights in an accommodation of Airbnb, Booking.com, Expedia Group or TripAdvisor in the EU14.¹⁵ This in return has put pressure on the local housing market in cities, such as Barcelona or Amsterdam (ANVR & Amadeus, 2018)¹⁵. According to a Eurostat survey from 2019, 21% of EU citizens arranged an accommodation from another private person via a website or app and 8% did the same for transport services¹⁶. The need for a fair regulatory framework for online platforms and in particular, fair rules for all stakeholders and service providers (e.g. also differentiating professional vs. occasional STR), was recognised in the stakeholder online consultation as a topic of urgency and importance. This was mentioned in the survey by four business associations, two businesses, one trade union and one regional development agency. The main call was to ensure create a level playing field and fair working conditions.

It was announced in the SME strategy that the European Commission could develop a framework specifically for short-term accommodation rental services, in order to strengthen the EU tourism ecosystem¹⁶ and an online consultation was launched on the topic¹⁷. Short-term rental (STR) platforms are key players in the tourism ecosystem and could, together with other players, be addressed in an action complementing the provisions of Digital Services Act¹⁸ and Digital Markets Act¹⁹ and other relevant legislation. Attention must be paid to ensuring that tourists receive appropriate protection irrespective of the type of the service provider or the type of service (e.g. accommodation) they use. The Digital Services Act lays the groundwork to develop rules and regulations to protect consumers in their fundamental rights, establish a transparent and accountable framework for online platforms, to foster innovation, competitiveness and growth within the single market.



¹⁴ NTG Desk Research Summary https://nexttourismgeneration.eu/wp-content/uploads/2019/03/NTG_Desk_Research_Summary_January_2019.pdf

¹⁵ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Short-stay_accommodation_offered_via_online_collaborative_economy_platforms

¹⁶ COM(2020) 103 final

¹⁷ https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13108-Tourist-services-short-term-rental-initiative_en

¹⁸ Digital Services Act <https://digital-strategy.ec.europa.eu/en/policies/digital-services-act-package>

¹⁹ Digital Markets Act https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/digital-markets-act-ensuring-fair-and-open-digital-markets_en

Measurement of targets:

- The target for 2023 could be assessed based on the existence of such a framework
- The target for 2025 could be assessed by an ad-hoc survey of public authorities
- The target for 2030 could be assessed by an ad-hoc study

Advised Actions	Costs / Conditions
European Commission	
<ul style="list-style-type: none"> • To build on the feedback from the public consultation on EU short term rental (STR) and take steps to enhance transparency on STR and market access • To develop and follow proposed measures for digital labour platforms, as outlined in the COM(2021) 761 final 	<ul style="list-style-type: none"> • Resources for meetings and stakeholder consultations on proposing appropriate measures (€300,000 once).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To support the Commission in furthering its initiative on short-term rentals • To adhere and execute the EU policies for fair rules and conditions for all people working through online platforms 	<ul style="list-style-type: none"> • Resources to implement the EU short term rental (STR) regulation policy follow-up on a regional level (€25,000 per annum).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To collaborate with local authorities in monitoring the impact of STR and support maintaining the local authenticity and culture of the areas • To include in the destination promotion activities innovative digital and sustainable sharing accessible platforms that create wellbeing for tourists and locals (e.g. local tours, food products) 	<ul style="list-style-type: none"> • Resources to monitor the STR sector on a destination level and develop possible actions (€25,000 once, and staff time for monitoring per annum) • Resources to organise awareness campaigns to participate and use sharing platforms for innovative use in tourism – local products, experiences culture, etc. (€25,000 per annum).
Industry	
<ul style="list-style-type: none"> • To adhere to and execute the policies for fair conditions for people working through online sharing economy platforms in tourism (e.g. passenger drivers, food deliverers, experience providers) • To support the Commission in furthering its initiative on short-term rentals and other possible tourism-related actions on fair and transparent platform economy 	<ul style="list-style-type: none"> • Resources to adhere to information requirements on platforms (primarily staff time) and STR providers

1.4 Collaborative destination governance

Feasibility level: B

The tourism ecosystem is often intertwined with life in the visited destinations (e.g. hospitality facilities, events, festivals and cultural activities are all shared by local users and tourists), and tourism related activities accounted for 22,4% of persons employed in the service economy in Europe in 2018²⁰. The growth of tourism pre-COVID also led to a high tourism intensity, with tourists spending 20 nights or more per inhabitant per year in certain European destinations²¹. Collaborative governance models of tourism may help prevent issues related to overtourism, facilitating both tourism and non-tourism stakeholders to collaborate to help design-for-all approaches that improve the quality of space for both tourists and residents²². In protected areas (e.g. EU Natura 2000 network) cooperation between tourism and those involved in the management of nature can lead to sustainable tourism products that protect natural value, while greater alignment with cultural and creative industries also helps create better spaces-for-all. Cultural and creative industry stakeholders should also be considered to help improve the quality of space within destinations to allow both tourists and locals to benefit, while greater engagement with the solidary and social economy may also fit with more collaborative destination governance.

Examples from Flanders and Rotterdam highlight different ways in which DMMOs have taken the lead to pursue such a collaborative perspective^{23,24}, while the DMMO of Amsterdam has taken the initiative to develop a vision, based on co-creation with over 120 stakeholders in the destination²⁵. The Spanish Smart Destinations Network highlights the quality of life of residents as part of high-quality smart destination²⁶, and tourism observatories across Europe and the world are collating data, also with an eye on social impacts of tourism in the destination^{27,28}. Such governance models and processes can help develop the tourism ecosystem in a way that is more inclusive, and that provides services for local users and visitors alike, thus contributing to greater long-term sustainability and resilience of destinations.

With its emphasis on contributing to economic, social and territorial cohesion, the European Cohesion Policy 2021-2027²⁹ can support multilevel governance and cooperation that can contribute to more collaborative destinations governance. In addition, the European Commission has supported several research projects to stimulate cooperation in tourism destinations. For example, SCITHOS³⁰ project brings together policymakers, residents and other local stakeholders to discuss the future of tourism in their destination in a playful setting. SmartCulTour³¹ engages stakeholders in co-creating smart cultural tourism practices. Awards for European Capitals of Smart Tourism³² and European networks

²⁰ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_statistics

²¹ Eurostat (2021) Tourism Statistics. Available at https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_statistics; figure 4, original source: Eurostat (tour_occ_ninat)

²² <https://www.cbi.eu/news/regenerative-tourism-next-step-sustainable-tourism>

²³ <https://en.rotterdampartners.nl/app/uploads/2019/09/IAB-Final-Report-PDF.pdf>

²⁴ <https://www.visitflanders.com/en/trade-covid-19/our-future-vision/>

²⁵ <https://openresearch.amsterdam/nl/page/68396/herontwerp-bezoekers-economie-amsterdam-visie-2025>

²⁶ <https://www.destinosinteligentes.es>

²⁷ <https://www.observatoriturisme.barcelona/en>

²⁸ <https://www.unwto.org/sustainable-development/unwto-international-network-of-sustainable-tourism-observatories>

²⁹ European Commission (2021). Cohesion Policy. Available at https://ec.europa.eu/regional_policy/en/2021_2027/

³⁰ <https://scithos.eu/>

³¹ <http://www.smartcultour.eu/>

³² https://smart-tourism-capital.ec.europa.eu/best-practices_en

on Smart Destinations (e.g. Living-in.eu) have helped to bring forward best practices in destination management and development. During the online stakeholder consultation, representatives of DMMOs in particular highlighted the importance of collaborative governance and a potential role for DMMOs to take a leading role here, thus moving beyond just marketing, albeit that these sentiments were shared by most stakeholders.

Achieving collaborative destination governance may require additional infrastructure aimed at stimulating communication, interaction and relationship building, with a specific eye on SMEs. While DMMOs may take a lead in setting up such relations, it may require strengthening infrastructure that supports connecting people, also by means of technology and smart tools³³. At the same time, outcomes from several projects (e.g. SmartCulTour³⁰; SCITHOS²⁹, SmartDest³⁴) highlight that in relation to collaborative governance, issues are commonly social rather than technical in nature, and that there is a need to beware of (technological) solutionism. First, an understanding of different management models and collaborative governance structures may need to be gained, before focusing on technological investments. Given the complexity and place-specific nature of these social interactions, it may be useful to also emphasise learning experiences here, rather than just best practices, which are most commonly shared. This may highlight the need for infrastructure that stimulates more process-oriented outcomes, such as, the development of living labs for experimentation, or concepts such as serious gaming where people engage with each other in different ways than in normal daily interactions.



Measurement of targets:

- The 2023 target could be attained when the results of the studies on different management models for the tourism ecosystem are published
- The 2025 target could be measured through an ad-hoc study of DMMO and municipal plans
- The 2030 target could be measured through an ad-hoc study of annual reports or a survey of DMMOs.

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To facilitate research, knowledge sharing and best practices between MS/regions, and different types of DMMO systems with studies, EDEN and Smart Capital awards, and benefiting from CLLD (community-led local development) examples • To work with Member States and destinations on developing measurements on impacts of tourism, linked with Eurostat and EU Tourism Dashboard 	<ul style="list-style-type: none"> • Support for Research and Innovation with regards to collaborative governance through Horizon Europe (€ 500.000 - €2.000,000 depending on specific Horizon Europe call/programme) • A study on destination management models and best practices (€50,000 once).

³³ <https://cordis.europa.eu/project/id/870644/reporting>

³⁴ <https://smartdest.eu/>

<ul style="list-style-type: none"> To facilitate stakeholder collaboration on best practices and recommendations on governance of the tourism ecosystem at a local level 	<ul style="list-style-type: none"> Resources to support indicator development on the impact of tourism (Eurostat and EU Tourism Dashboard) (€25.000 per annum) Annual Awards for EDEN and Smart Capitals (€2.000 per annum)
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> To provide technical assistance for collaborative destination governance development with civil society included To coordinate best practice exchange between destinations at a national level 	<ul style="list-style-type: none"> Resources to compile and analyse best practices either in-house or through hired-in experts, and share these with destinations (€15.000 once) Resources for National Statistics Institute to integrate tourism impacts on well-being in resident surveys – if not possible on national level, coordinate with regional/local statistical offices or DMMOs (staff time)
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> To become collaborative organisations on a local destination level, which work together with public and private stakeholders, residents and relevant actors outside the tourism ecosystem to jointly create more resilient and innovative tourism Collaborative workshops for stakeholder mapping and strategy development To implement nationally/regionally agreed indicators of tourism impacts in regular resident surveys, possibly considering GSTC destination criteria³⁵ To simulate focus on managing visitor flows to balance tourism (from popular places to less visited ones) and use tourism ecosystem to create positive impacts and contribute to value creation 	<ul style="list-style-type: none"> Resources for mapping stakeholders on a destination level and potential local suppliers (€15.000 once; subsequently staff time to maintain mapping) Resources for experimenting with new ways to engage with stakeholders and collaborative governance (small-scale experiments and interventions costing €10.000, or staff time for writing proposals for and participation in EU projects raising €100.000s)
Industry	
<ul style="list-style-type: none"> To diversify products to suit both local users and visitors (e.g. gourmet tourism, creative and cultural tourism, ecotourism, nautical tourism) To develop the tourism ecosystem for different tourism seasons and segments, also for SMEs To engage local producers in tourism supply chains 	<ul style="list-style-type: none"> Effort investment in participating in destination governance events and providing input for strategies (staff time) Investment in new tourism products and business models (e.g. social enterprises) (staff time: €5.000 up to €100.000 depending on the size of company and ambition) Investment in attending networking events with local stakeholders (staff time)

³⁵ <https://www.gstcouncil.org/gstc-criteria/gstc-destination-criteria/>

2 Green Transition

The Green tourism transition includes five priority topic areas aimed at making the European tourism ecosystem more sustainable and competitive. This transition is the result of a series of consultations with stakeholders that included a survey with 180 respondents, two rounds of workshops with 115 participants, two rounds of consultations with member states and European institutions, thus reflecting the exchange of views of leading stakeholders with expertise in the sector. A vast diversity of topics was initially discussed with the aim of reducing the overall environmental footprint of the tourism sector, especially in light with the European Climate Law, which entered into force on 9 July 2021³⁶. These went from the reduction of GhG emissions in tourism mobility to preserving biodiversity, embedding the various issues relating to the circular economy, and mainstreaming green purchase and procurement. All these issues were in a later moment condensed into five priorities: reducing passenger transport GhG emissions; reducing and recycling plastics in tourism; minimising food waste; improving energy efficiency of buildings; measuring and reporting environmental footprint. Therefore, while some initially discussed issues may not be included as specific topic areas, they are all embedded in the transition within the five priorities.

2.1 Reducing passenger transport GhG emissions

Feasibility level: A

Tourism globally accounts for around 8% of GHG emissions, and in high-income countries, transport is responsible for 50% of such emissions³⁷. The need to decarbonise tourism-related transport was one of the areas with greatest consensus in the stakeholder survey. While any type of transport can be used for tourism purposes, the workshop participants defined it as transport related to these three areas: airlines, cruise lines, land transport and transport within the tourist destination. The tourism-related transport sector has been developing strategies to reach net zero greenhouse gas emissions by 2050, and made commitments to substantially increase their use of sustainable aviation fuel by 2030^{38,39}. For example, the members of the Cruise Line Industry Association (CLIA) have made a fleet wide commitment to reduce the carbon emissions per passenger by 40% by 2030. In cities, a 2017 sustainable urban mobility plan (SUMP) Needs Assessment Survey showed that only 37% of responding cities had implemented a SUMP, varying greatly from 78% in France, to 6% in Greece⁴⁰. It is acknowledged that peripheral and rural parts of Europe will face greater difficulties in decarbonising their transport options and their contribution to actions and targets needs to be assessed accordingly.

On 14 July 2021, the European Commission adopted a series of legislative proposals⁴¹ setting out how it intends to achieve climate neutrality in the EU by 2050⁴². The package proposes to revise several

³⁶ European Climate Law 2021/1119. Available at https://ec.europa.eu/clima/eu-action/european-green-deal/european-climate-law_en

³⁷ Lenzen, M., Sun, Y. Y., Faturay, F., Ting, Y. P., Geschke, A., & Malik, A. (2018). The carbon footprint of global tourism. *Nature Climate Change*, 8(6), 522-528. <https://doi.org/10.1038/s41558-018-0141-x>

³⁸ ATAG (2021) Waypoint 2050: Balancing growth in connectivity with a global air transport response to the climate emergency: a vision of net zero aviation by mid-century. Second edition, September 2021. Geneva (Switzerland): Air Transport Action Group. Available at https://aviationbenefits.org/media/167417/w2050_v2021_27sept_full.pdf

³⁹ WEF (2021) Clean Skies for Tomorrow Leaders: 10% Sustainable Aviation Fuel by 2030 > Press releases, 22 Sep 2021. Available at <https://www.weforum.org/press/2021/09/clean-skies-for-tomorrow-leaders-commit-to-10-sustainable-aviation-fuel-by-2030>

⁴⁰ Interreg Europe (2018). Sustainable Urban Mobility Plans. Available at https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/policy_briefs/PolicyBrief_SUMPs_TO4.pdf

⁴¹ Delivering the European Green Deal (europa.eu) https://ec.europa.eu/clima/eu-action/european-green-deal/delivering-european-green-deal_en

⁴² 2050 long-term strategy (europa.eu) https://ec.europa.eu/clima/eu-action/climate-strategies-targets/2050-long-term-strategy_en

pieces of EU climate legislation, including the EU ETS, Effort Sharing Regulation, transport and land use legislation, setting out in real terms the ways in which the Commission intends to reach EU climate targets under the European Green Deal. Adhering to the common European objective to reach net zero greenhouse gas emissions by 2050 and reduce them by 55% by 2030 is a key challenge for the tourism-related transport sector⁴³. The Smart and Sustainable Mobility Strategy⁴⁴ sets several objectives to improve sustainable transport modalities. Supporting sustainable multimodal and active transportation modes in the cities reduces the transport emissions of also tourism activities (see DG Move's Multimodal Digital Mobility Services Initiative)⁴⁵. The European Commission is supporting SUMP's with sustainable urban mobility indicators (SUMI)⁴⁶ and there is a self-assessment tool to help cities taking first steps⁴⁷. The EU is making substantial investments in sustainable fuels for vehicles, and multimodal hubs for sustainable transport⁴⁸. DMMOs can also play their part by reviewing their market segmentation, and considering options to develop more sustainable visits by shortening distance travelled, switching to less carbon intensive modes of transport, or increasing length of stay, for example⁴⁹.

While the action is on passenger transport, the long-term target is deliberately on climate neutral cities, since in recent years before covid-19, cities have witnessed the greatest growth in GHG per guest/night due to an increase in volume and decrease in length of stays, and also because it is difficult to differentiate between transport for tourism and for other purposes. The aims and requirements for decarbonisation of the transport sector result from sector-wide proposals, and separate reporting obligations or data collection would cause additional reporting burdens.



Measurement of targets:

- 2023 target could be assessed by a study that reviews public commitments of passenger transport organisations across Europe.
- The 2025 target is linked with the objectives of the European Urban Mobility Framework and could be assessed in collaboration with the responsible policy service.

⁴³ WTTC (2021) A Net Zero Roadmap for travel and tourism: proposing a new target framework for the travel and tourism sector. Available at: https://wtcc.org/Portals/0/Documents/Reports/2021/WTTC_Net_Zero_Roadmap.pdf

⁴⁴ European Commission (2020). COM (2020) 789 final. Sustainable and Smart Mobility Strategy – putting European transport on track. Available at http://europeanmemoranda.cabinetoffice.gov.uk/files/2021/01/210113_-_EM_-_Sustainable_and_smart_mobility.pdf

⁴⁵ Multimodal digital mobility services (europa.eu) https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13133-Multimodal-digital-mobility-services_en

⁴⁶ European Commission (nd). Sustainable Urban Mobility Indicators (SUMI). Available at https://transport.ec.europa.eu/transport-themes/clean-transport-urban-transport/sumi_en

⁴⁷ ELTIS (2020). SUMP Self-Assessment Tool. Available at <https://www.eltis.org/resources/tools/sump-self-assessment-tool>

⁴⁸ Green airports and ports as multimodal hubs for sustainable and smart mobility: [Green airports and ports as multimodal hubs for sustainable and smart mobility | Programme | H2020 | CORDIS | European Commission \(europa.eu\)](https://cordis.europa.eu/project/id/101014)

⁴⁹ Grythe, Henrik, and Susana Lopez-Aparicio. "The who, why and where of Norway's CO2 emissions from tourist travel." Environmental Advances 5 (2021): 100104. <https://doi.org/10.1016/j.envadv.2021.100104>

- The 2030 target is linked with the Smart and Sustainable Mobility Strategy milestone⁵⁰ and could be assessed in its follow-up in collaboration with the responsible policy service.

Advised Actions	Cost/Conditions
European Commission	
<ul style="list-style-type: none"> • To provide guidance in the roll out of the Fit for 55 package taking into account special need contexts such as those of islands, remote and outmost regions; • To invest in R&I to develop sustainable energy/fuels. • To promote the use of net zero carbon emission railway and waterborne inter-modal passenger transport taking into account the inter-modality with bike; • To support regions and cities in the roll-out of effective urban and rural mobility plans, including the development of quality infrastructure for walking & cycling 	<ul style="list-style-type: none"> • R&I on sustainable transport technologies through Horizon Europe (€1.2bn available for climate, energy and mobility projects in the first call for projects under the Work Programme 2021-2022). • Support action under CEF to support Member States in collection of data for mobility indicators towards sustainable urban mobility.
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To invest in seamless multimodal systems and electric/hydrogen charging both in urban and rural areas, and to adopt taxation measures⁵¹ to foster the use of both sustainable energy/fuels and clean technologies; • To support integrating tourism in the Sustainable Urban Mobility Plans (SUMP) developed on national, regional and destination level; • To promote inter-institutional cooperation aiming at transport interoperability, multimodality and sustainability. • To develop multimodal connectivity and infrastructure for visitors and their usage of local public and active transport options 	<ul style="list-style-type: none"> • Resources for sustainable transportation and refuelling infrastructure for all modes of transport; • Resources for National Tourism Administrations to promote low-carbon travel and active mobility (€20-200,000 depending on choices of campaigns). • Resources to develop sustainable urban mobility plan which serves both residents and visitors (€20-200,000 depending on size/complexity of destination).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To develop marketing strategies to reduce average GHG data per guest/night. • To promote multimodal connectivity for visitors and their usage of local public and active transport options 	<ul style="list-style-type: none"> • Resources to market research and for attracting low carbon travellers (€2-25,000 for an initial study depending on the level of complexity/accuracy sought).
Industry	
<ul style="list-style-type: none"> • To invest in reducing emissions, supply storage and blending of sustainable aviation and marine fuel in particular due to their relevance to the tourism 	<ul style="list-style-type: none"> • Resources to reduce emissions, taking advantage of recent innovations, and possibly benefitting from Cohesion Funds

⁵⁰ European Commission (2021) 100 Climate-neutral Cities by 2030 – by and for the Citizens https://ec.europa.eu/info/publications/100-climate-neutral-cities-2030-and-citizens_en

⁵¹ As regards energy products, the proposal for a recast of the Energy Taxation Directive (ETD) - COM(2021) 563 final– would remove the current exemption of the aviation and waterborne navigation and fishing sector. The proposal will require the unanimous consent of Member States to be approved.

<p>industry, and to monitor and publish data in a standardised format;</p> <ul style="list-style-type: none"> • To commit to reduce environmental footprint in line with the EC Recommendation 2013/179⁵²; • To develop tourism services, which promote active mobility (cycling, walking, water sports) and experiences that encourage increased length of stay. • All companies, including SMEs, can target markets with low environmental footprint. 	<p>and Common Provision Regulation Funds (cost calculations vary depending on the multiple factors at play, but synthetic aviation fuel production is currently 2-3 times more expensive than kerosene⁵³).</p> <ul style="list-style-type: none"> • Staff training to learn how to develop new experiences and how to segment markets based on their carbon footprint (SMEs could get access to shared training at destination level, while larger firms may need to invest e.g. €20,000 for in-house training and plan development).
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⁵² To be updated in December 2022

⁵³ Gössling, S., Humpe, A., Fichert, F., & Creutzig, F. (2021). COVID-19 and pathways to low-carbon air transport until 2050. *Environmental Research Letters*, 16(3), 034063.

2.2 Reducing and recycling plastics

Feasibility level: A

Europe is the second largest plastics producer after China, being responsible for 150,000-500,000 tonnes of macroplastics and 70,000-130,000 tonnes of microplastics in the sea every year⁵⁴. Plastics waste is responsible for the death of numerous sea birds, sea mammals, marine turtles and fish, thus threatening the marine ecosystem, with an annual damage being estimated to circa €1.5 billion⁵⁵. A link between tourist arrivals and plastics waste has been highlighted by recent research, with marine litter being found to increase by 40% during peak season in the Mediterranean region^{Error! Bookmark not defined.}, and in other parts of the world⁵⁶. Because of the increasing tourism demand, this issue is only going to increase in the next 10 years⁵⁷, if not properly addressed. The solutions should focus on eliminating the use of unnecessary plastic and increase collection and recycling rates^{Error! Bookmark not defined.}. The issue of plastic was deemed the most important amongst stakeholder workshop participants within the topic of circularity in tourism.

As part of the Circular Economy Action Plan⁶⁹, the EU has adopted a European Strategy for Plastics⁵⁸, to tackle this issue. In line with the strategy, a European Directive on Single use plastics⁵⁹ aims to address the 10 single-use plastic items most commonly found on European beaches, and is promoting sustainable alternatives. Other initiatives of this strategy include the introduction of incentives to reduce plastics consumption, transition to reusable systems, and the establishment of high collection and recycling rates. In addition, the Communication on the Sustainable Blue Economy sets new ambitions to protect the marine environment from plastics and other types of waste and pollution⁶⁰. The EU is investing substantial amounts on to develop and implement sustainability-based solutions for bio-based plastic production and use to preserve land and sea environmental quality in Europe, through Horizon R&I programmes⁶¹.



⁵⁴ Alessi, E., & Di Carlo, G., (2018). Out of the plastic trap: saving the Mediterranean from plastic pollution. WWF Mediterranean Marine Initiative. Report available at https://awsassets.panda.org/downloads/a4_plastics_med_web_08june_new.pdf

⁵⁵ United Nations Environment Program (2014). Valuing Plastics: The Business Case for Measuring, Managing and Disclosing Plastic Use in the Consumer Goods Industry. Available at <https://wedocs.unep.org/handle/20.500.11822/9238>

⁵⁶ United Nations Environment Program and World Travel & Tourism Council (2021). Rethinking Single-Use Plastic Products in Travel & Tourism - Impacts, Management Practices and Recommendations. Nairobi. Available at <https://wedocs.unep.org/bitstream/handle/20.500.11822/36324/RSUP.pdf>

⁵⁷ Epler Wood, M., Milstein, M., Ahamed-Broadhurst, K. (2019). Destinations at Risk: The Invisible Burden of Tourism. The Travel Foundation. Available at <https://www.thetravelfoundation.org.uk/invisible-burden/>

⁵⁸ European Commission (2018). Plastics Strategy. Available at https://ec.europa.eu/environment/strategy/plastics-strategy_en

⁵⁹ European Commission (2019). European Directive on single-use plastics. Available at https://ec.europa.eu/environment/topics/plastics/single-use-plastics_en

⁶⁰ European Commission (2021). COM/2021/240 final. Available at <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:240:FIN>

⁶¹ CORDIS Results on bio-based plastic production <https://cordis.europa.eu/search?q=contenttype%3D%27project%27%20AND%20programme%2Fcode%3D%27CE-BG-06-2019%27&p=1&num=10&srt=/project/contentUpdateDate:decreasing>

Measurement of targets:

- The 2023 target can be assessed based on reports of such best practice exchange events.
- The 2025 target can be evaluated by surveying regional authorities across Europe.
- The 2030 target can be assessed with a SME survey, following the example of the Flash Eurobarometer 441 on SMEs and circular economy⁶²

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To address issues relating to reduction, reuse and compostable plastics in the Packaging and Packaging Waste Directive⁶³ and in the policy framework on biobased, biodegradable and compostable plastics; • To support developing a common approach to measure circularity for plastics in tourism taking into account regional and local constraints for circular economy measures, in line with the common indicators related to the EU Circular Economy Action Plan. • To support R&I through Horizon Calls in behaviour-based methods that reduce and enhance plastic reuse and recycling of tourists and residents 	<ul style="list-style-type: none"> • Consultant to develop common approach (€30,000), plus EC staff time and cost of meetings and stakeholder consultations to develop common measures and facilitate best practice sharing (€20-50,000 per annum);
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • Development of market-based instruments to ensure that circularity of plastic is integrated in the tourism industry (e.g. use of taxation and other economic instruments to reward the uptake of recycled plastics and favour reduction, reuse and recycling over landfilling and incineration); • To create campaigns for tourism and residents to educate on the problems from plastics and offer training to businesses on how to embed plastic circularity in their operations; • Local authorities to step up waste collection and improve coordination between the authorities responsible for waste management, water and the land and sea environments. 	<ul style="list-style-type: none"> • Feasibility study and pilot to develop market-based instruments (€20-200,000) • Resources for awareness raising campaigns by National Tourism Administrations or Ministry of Environment (€20-200,000) • Resources allocated for local initiatives, possibly benefiting from Cohesion policy and CPR funds (e.g. ERDF and EMFF).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To promote nature clean-up activities with the possibility for tourists to participate. 	<ul style="list-style-type: none"> • Incorporated as part of regular training programme for businesses (with limited additional cost). • Awareness raising campaigns could range from (€20-250,000 per annum depending on the destination and the level of severity).

⁶² Flash Eurobarometer 441 (2016). European SMEs and the Circular Economy. Available at https://ec.europa.eu/environment/green-growth/docs/fl_441_sum_en.pdf

⁶³ European Commission (1994). Packaging and Packaging Waste Directive. Available at https://ec.europa.eu/environment/topics/waste-and-recycling/packaging-waste_en

Industry	
<ul style="list-style-type: none"> • To dialogue with supply chain to create demand for alternatives to single-use plastic items; • To participate in innovation programmes and hackathons on eco-design items for the tourism/hospitality industry; • All businesses, including SMEs, can enrol in EMAS, the EU Ecolabel or other internationally recognised and recommended third-party validated labels (e.g. GSTC), national schemes etc. that have a direct or indirect positive effect on reduction of plastic waste. 	<ul style="list-style-type: none"> • Investment in labels (e.g. for EU Ecolabel EUR 200/600 for SMEs for application fee + variable annual fees + staff time cost).

2.3 Minimising food waste

Feasibility level: A

In Europe, the tourism and hospitality sector contribute to 12% of total food waste⁶⁴, as the average consumer of hospitality services is responsible for around 1kg of waste every day⁶⁵- and 1kg of food waste is responsible for around 1.9 Kg of CO2 emissions⁶⁶. This has become a significant sustainability issue, that if not tackled, is estimated to grow due to the increasing trend of out of home dining and food delivery⁶⁷. Besides, it also results in clear financial losses for businesses, such as the cost of discarded food, the cost of staff time used to purchase and produce unused food and the cost of food disposal, amongst others. Minimising food waste was highlighted in the stakeholder online consultation as the second most important topic, after plastic, within the area of circularity in tourism.

Although the implications are clear, there is no common method that quantifies and monitors food waste in the hospitality and tourism industry. Horizon Europe includes food systems (including food waste) as a priority area for research and innovation⁶⁸. The Action Plan on Circular Economy⁶⁹ and the Farm to Fork Strategy⁷⁰ are laying the ground for a coordinated European action to reduce food waste at all levels of the supply chain. In particular, the Commission is working on setting EU-level targets for general food waste reduction, with the aim of proposing legally binding targets for Member States by end of 2023⁷¹. As part of the plan, Eurostat is working on establishing a baseline, with a specific section for the hospitality and services industry, although it is important to note that this baseline includes data from the out-of-home consumption in general (including hospitals, canteens and schools) therefore further calculations on the specific role of tourism and hospitality will be necessary⁷².



⁶⁴ Hotrec (nd.) European hospitality industry guidelines to reduce food waste https://ec.europa.eu/food/system/files/2018-04/fw_lib_2017_hotrec-guidelines_en.pdf

⁶⁵ Filimonau, V., & Delysia, A. (2019). Food waste management in hospitality operations: A critical review. *Tourism management*, 71, 234-245. Doi 10.1016/j.tourman.2018.10.009

⁶⁶ Monier, V., Mudgal, S., Escalon, V., O'Connor, C., Gibon, T., Anderson, G. & Morton, G. (2010). Preparatory study on food waste across EU 27. *Report for the European Commission [DG ENV—Directorate C]*. https://ec.europa.eu/environment/eussd/pdf/bio_foodwaste_report.pdf

⁶⁷ IRI (2019). Out of Home foodservice sales, Bracknell. Available at <https://www.iriworldwide.com/en-gb/insights/news/1-in-5-meals-eaten-out-of-home-as-european-consumers-favour-service-over-home-cooking-1>

⁶⁸ Food systems | European Commission (europa.eu) https://ec.europa.eu/info/research-and-innovation/research-area/environment/bioeconomy/food-systems_en

⁶⁹ European Commission (2020). Circular Economy Action Plan. Available at https://ec.europa.eu/environment/strategy/circular-economy-action-plan_en

⁷⁰ European Commission (2020). Farm to Fork Strategy. Available at https://ec.europa.eu/food/horizontal-topics/farm-fork-strategy_en

⁷¹ https://ec.europa.eu/food/safety/food-waste/eu-actions-against-food-waste/food-waste-measurement_en

⁷² European Commission (2020). Food waste measurement. Available at https://ec.europa.eu/food/safety/food-waste/eu-actions-against-food-waste/food-waste-measurement_en

Measurement of targets:

- The 2023 target could be measured through existence of such a repository
- The 2025 target could be measured through an ad-hoc study
- The 2030 target could be measured with the newly established Eurostat indicator⁷³

Advised Actions	Cost / Conditions
European Commission	
<ul style="list-style-type: none"> • To establish a common methodology to reduce food waste to deliver on the already foreseen legally binding targets by 2023; • To support R&I for developing innovative management of local supply chains and innovative behaviour-based methods that reduce food waste • To establish links with the Common Agricultural policy; • To create repository of projects relating to food waste reduction in tourism with guidelines, measurement tools and best practices, in collaboration with existing platforms⁷⁴. 	<ul style="list-style-type: none"> • Support R&I and development of local supply chain systems for tourism businesses through a Horizon Europe Call and Common Agriculture Policy (funding available through the Farm to Fork Strategy); • Call for tender for repository creation on food waste reduction in tourism (€50-500,000 depending on scale and funding line).
Member States/Regions	
<ul style="list-style-type: none"> • To conduct a baseline measurement of hospitality food waste; • To improve food waste regulatory framework where appropriate (e.g. make separation compulsory in the hospitality sector; revise health and safety standards for food donations; provide fiscal incentives aimed at reducing food waste); • To run awareness raising campaigns on the benefits of producing food with a lower environmental footprint and reducing food waste following the principles of food waste hierarchy. 	<ul style="list-style-type: none"> • Resources for National Statistical Institute to develop and implement food waste measurement; • Resources for awareness raising campaigns for National Tourism Administrations or Ministry of Agriculture (€50-500,000 depending on scale and funding line).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To provide training following the principles of food waste hierarchy and to support businesses to practically apply these strategies; • To create local chef initiatives to tackle food waste, use seasonal and local ingredients and develop plant-based menus; • To pilot test and use new technology aimed at food waste monitoring and reduction. 	<ul style="list-style-type: none"> • Incorporated as part of regular training programme for businesses (with limited additional cost). • Resources allocated for local initiatives, possibly benefiting from Cohesion Policy and CPR Funds (e.g. ERDF and EAFRD)
Industry	
<ul style="list-style-type: none"> • To implement food circularity principles (use of seasonal and low carbon ingredients, smaller portion sizes, re-use of ingredients, redistribute unsold food to charities via local network or smartphone apps, recycle and compost); 	<ul style="list-style-type: none"> • Investment in training at all levels (managerial, waiting and kitchen staff) or benefit from free training offer when available (costs vary depending on size of business);

⁷³ Eurostat (2021). Methodology on waste measurement. Available at <https://ec.europa.eu/eurostat/web/waste/methodology>

⁷⁴ See <https://circulareconomy.europa.eu/platform/> and https://ec.europa.eu/food/safety/food-waste_en

<ul style="list-style-type: none"> • To prioritise suppliers that apply circular food principles; • To enrol in EMAS, the EU Ecolabel or other internationally recognised and recommended third-party validated labels (e.g. GSTC) or national schemes that have a direct or indirect positive effect on food waste reduction. 	<ul style="list-style-type: none"> • Investment in apps and/or software that helps track and reduce food waste; • Investment in labels (e.g. for EU Ecolabel EUR 200/600 for SMEs for application fee + variable annual fees + staff time cost).
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2.4 Improving the energy efficiency of buildings

Feasibility level: B

Collectively, buildings in the EU are responsible for 40% of energy consumption and 36% of greenhouse gas emissions, which mainly stem from construction, usage, renovation and demolition⁷⁵. Currently, 75% of the EU building stock is energy inefficient, and materials management accounts for up to two-thirds of global greenhouse gas emissions⁷⁵. The Energy Efficiency Directive has been revised in light of the Green Deal, requiring EU countries to collectively ensure an additional reduction of energy consumption of 9% by 2030 compared to the 2020 reference scenario projections⁷⁶. Greater energy efficiency and circularity in buildings and construction in the tourism industry, together with the use of climate-neutral building materials and renewable energies, is a means to reduce energy consumption and water, reduce consumption bills, improve material use and further reduce GhG and other air pollutant emissions while improving the attractiveness of the tourism offer. At least 20% of the tourism businesses surveyed by WTTC with carbon reduction targets have done so following the Science Based Targets Initiative, and this number is expected to grow rapidly⁷⁷. Increasing energy efficiency in the tourism built environment was deemed the third most important topic to be discussed in the first consultation workshop, after issues related to plastics and food waste. The tourism built environment includes accommodation (including serviced accommodation such as hotels but also short-term rental), restaurants, event venues, airports, marinas/pleasure ports, traveller hubs, museums and cultural heritage attractions.

In October 2020, the European Commission presented the Renovation Wave Strategy⁷⁸, which contains an action plan with concrete regulatory, financing and enabling measures to boost building renovation. As part of the strategy, the Commission is working to revise the current Energy Performance of Buildings Directive⁷⁹, which includes specific annual minimum reduction obligations for the energy consumption in the public sector. The Energy Efficiency Directive has been also revised, requiring EU countries to collectively ensure an additional reduction of energy consumption of 9% by 2030 compared to the 2020 reference scenario projections⁸⁰. The Commission has also launched the

⁷⁵ European Commission (2020) In focus: Energy efficiency in buildings https://ec.europa.eu/info/news/focus-energy-efficiency-buildings-2020-feb-17_en

⁷⁷ WTTC (2021) A Net Zero Roadmap for travel and tourism: proposing a new target framework for the travel and tourism sector. https://wtcc.org/Portals/0/Documents/Reports/2021/WTTC_Net_Zero_Roadmap.pdf

⁷⁸ European Commission (2020). Renovation Wave Strategy. Available at https://ec.europa.eu/energy/topics/energy-efficiency/energy-efficient-buildings/renovation-wave_en

⁷⁹ European Commission (2010). Energy Performance of Buildings Directive. Available at https://ec.europa.eu/energy/topics/energy-efficiency/energy-efficient-buildings/energy-performance-buildings-directive_en

⁸⁰ European Commission (2021) Energy efficiency directive. Available at https://ec.europa.eu/energy/topics/energy-efficiency/targets-directive-and-rules/energy-efficiency-directive_en

New European Bauhaus⁸¹, which brings together stakeholders to develop ideas for climate-friendly, creative and inclusive architectures, in line with the European Accessibility Act⁸². Both these aspects should be considered when renovating or creating new tourism infrastructures. The guidance on Recovery and Resilience Plans identified building renovation as a priority for national recovery plans under the European Flagship 'Renovate'⁸³. To achieve the at least 55% emissions reduction target for 2030, proposed by the Commission in September 2020, the EU must reduce buildings' greenhouse gas emissions by 60%, their energy consumption by 14%, and the energy consumption of heating and cooling by 18%⁷⁸.



Measurement of targets:

- The 2023 target could be measured by surveying Member States experts on the inclusion of tourism buildings and infrastructures in the national energy and climate plans.
- The 2025 target could be assessed by the existence of agreement of tourism industry representatives.
- The 2030 targets could be measured with a survey/study in collaboration with the European Portal for Energy Efficiency in Buildings⁸⁴.

Advised Actions	Cost / Conditions
European Commission	
<ul style="list-style-type: none"> • To follow energy efficiency and greenhouse emissions for the tourism industry based on Eurostat indicators, and publish tourism-specific content in the European Portal for Energy Efficiency in Buildings; • To support R&I in developing technologies, set standards and behaviour-based methods that increase energy efficiency and circularity in the building sector, including tourism and travel infrastructures; • To support the renovation of tourism and travel infrastructures in line with the measures included in the Renovation Wave Strategy. 	<ul style="list-style-type: none"> • Research and Innovation funding for energy-efficient solutions under Horizon Europe (€1.2bn available for climate, energy and mobility projects in the first calls for projects under the first Work Programme 2021-2022); • Resources to improve energy efficiency included in cohesion policy funds, following the Renovation Wave principles (€50bn for the renovation of buildings).
Member States/Regions/Local Authorities	

⁸¹ European Commission (2021). New European Bauhaus. Available at https://europa.eu/new-european-bauhaus/index_en

⁸² European Commission (2019). European Accessibility Act. Available at <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32019L0882>

⁸³ European Commission (2021). Guidance to Member States on resilience and Recovery Plans. Available at https://ec.europa.eu/info/sites/default/files/document_travail_service_part1_v2_en.pdf

⁸⁴ The European Portal for Energy and Efficiency in Building. Available at <https://www.buildup.eu/en>

<ul style="list-style-type: none"> • To include public tourism and travel infrastructures in national strategies for tackling energy efficiency and circularity in buildings through the integrated national energy and climate plans; • To benefit from the European Bauhaus initiative in increasing efficiency, attractiveness and inclusiveness of newly designed tourism spaces. • Local and regional authorities to support local actors to apply circular economy actions to the product design, production process, consumption model and demolition and waste management of tourism infrastructure and buildings, focusing on the most energy-intensive materials and processes with the greatest potential: the reduction of concrete in building plans, the use of innovative and alternative types of cement, and the reuse of structural steel. 	<ul style="list-style-type: none"> • Resources for renovating public sector-owned tourism infrastructures and buildings for better energy efficiency and accessibility, benefitting from NRRPs when possible (€50/200M).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To collaborate with local authorities in repurposing abandoned buildings with cultural heritage potential that could be used as tourist attractions, thus adding to the destination appeal 	<ul style="list-style-type: none"> • Resources to map abandoned buildings with tourist appeal potential, and include them in promotional activities after renovation effort with local authorities (€ 100,000)
Industry	
<ul style="list-style-type: none"> • To invest in long-term renovation, aiming for nearly zero-energy buildings, supported by energy audits and performance certificates, and global certification schemes on sustainable buildings; • To adopt a <i>Design for All</i> approach in the renovation and product design. 	<ul style="list-style-type: none"> • To invest in sustainable materials and building methods, which will provide economic benefits in long-term, taking advantage of European incentives (amounts will vary substantially depending on the size and current state of buildings)

2.5 Measuring and reporting environmental footprint

Feasibility level: A

Green procurement has been proven to have direct benefits on reducing the environmental impacts of tourism⁸⁵. However, the excessive variety of environmental assessments existing across Member States creates burdens to companies and confusion amongst consumers, with 59% of them thinking that the existing labelling systems are either not clear or do not provide enough information⁸⁶. Therefore, establishing shared benchmarks and methodology for measuring the tourism products and services environmental footprint is needed, since it will provide tourism suppliers with better tools for making green claims that can be recognised, compared and evaluated⁸⁷. In addition, considering that

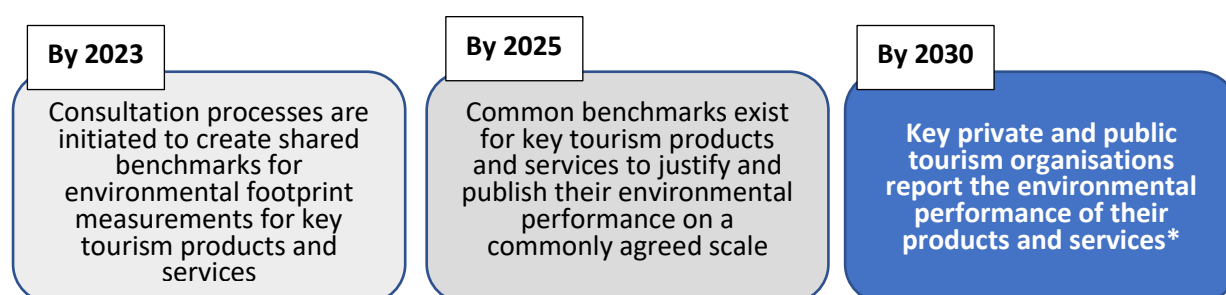
⁸⁵ European Commission (2013). Best Environmental Management Practices in the Tourism Sector <https://ec.europa.eu/environment/emas/takeagreenstep/pdf/BEMP-2.1-FINAL.pdf>

⁸⁶ European Commission (2018). Single market for Green Products Initiative. Available at <https://ec.europa.eu/environment/eussd/smgp/index.htm>

⁸⁷ UNEP (2019). Transforming tourism through sustainable procurement. Available at https://www.oneplanetnetwork.org/sites/default/files/transforming_tourism_through_sustainable_procurement_2019.pdf

69% of global travellers expect the tourism industry to offer sustainable products⁸⁸, having clearly understood environmental standards will support the trustworthy provision of green products and services and scale up green procurement in both the public and private sector. Consumers will thus be provided with an increasingly large selection of greener products. This topic was deemed of high importance by most stakeholders during the consultation process.

In line with the Circular Economy Action Plan⁶⁹, the Commission wants to develop a coherent product policy framework to make sustainable products and services the norm (and not the exception). Based on this, companies can substantiate their green claims using the Product and Organisation Environmental Footprint methods⁸⁶. Some sectors have already defined their sectoral category rules to simplify the application of the method and allow comparability between products. Such methodology can complement information to that measured in the context of the EU Ecolabel⁸⁹, EMAS⁹⁰ or national sustainability schemes, or the systems being designed by the private sector (such as those that are GSTC recognised), and provide comparability across suppliers, for example for green procurement purposes. Standardised environmental measurement will then provide additional knowledge to be used in the sustainability data collection framework (see point 1.2.).



Measurement of targets:

- The target for 2023 could be measured by existence of such initiated processes
- The target for 2025 could be measured by the existence of common (transparent, necessary, proportional and non-discriminatory) benchmarks for key tourism products in accommodation, food and beverage, transportation sectors and tour operations.
- The target for 2030 could be assessed by an independent ad-hoc study and possibly benefit from Eurobarometer surveys.

Advised Actions	Cost / Conditions
European Commission	
<ul style="list-style-type: none"> • To facilitate developing sectoral category rules for the Product Environmental Footprint method, or other simplified methods on tourism sectors in order to develop common transparent, necessary, proportional and non-discriminatory benchmarks for environmental performance (AAA->G), taking into consideration 	<ul style="list-style-type: none"> • Support SMEs to implement the Product Environmental Footprint methodology or other simplified methods, through COSME actions (€5 M); • Call for tender to facilitate developing benchmarks and

⁸⁸ ETC (2021). Encouraging sustainable tourism practices. Available at <https://etc-corporate.org/reports/handbook-on-encouraging-sustainable-tourism-practices/>

⁸⁹ European Ecolabel. Available at <https://ec.europa.eu/environment/ecolabel/>

⁹⁰ EU Eco-Management and Audit Scheme (EMAS). Available at https://ec.europa.eu/environment/emas/index_en.htm

* Referred to organisations with 50 or more employees (medium to large organisations)

<p>different contexts such as those of small and distant states and those of micro-enterprises and SMEs;</p> <ul style="list-style-type: none"> • To support extending the existing EU green public procurement criteria⁹¹ for hospitality, transport and events • To facilitate trainings on the use of EU instruments like the Environmental Footprint methods (EF). 	<p>sectorial category rules of the Product Environmental Footprint for key products and services (€ 20,000).</p>
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To apply existing and/or new EU green public procurement criteria in line with national public procurement rules; • To collect information on green procurement implementation in tourism at regional and national level; • To provide technical support and grants/loans to small and micro firms or industry associations to meet standards so green procurement does not become a barrier to trade. • To measure and report environmental performance for public sector owned tourism infrastructure, attractions and other organisations/ facilities. 	<ul style="list-style-type: none"> • Resources to educate and monitor on green procurement the national and regional actors (€ 100,000); • Resources allocated for supporting small and micro firms to meet green requirements, possibly benefiting from European Structural and Investment Funds, Cohesion Policy and CPR Funds (e.g. ERDF and EAFRD) (€ 500,000).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To provide marketing advantages and other benefits to sustainable products considering the relevant public procurement rules (supported on EU level). 	<ul style="list-style-type: none"> • Internal budget for promotional activities (no additional resources required);
Industry	
<ul style="list-style-type: none"> • Industry associations to provide training and possibly require environmental reporting as membership requirement, and report on their members' environmental performance, based on transparent, necessary, proportional and non-discriminatory environmental criteria; • To use EU instruments like the EU Ecolabel and EMAS as well as Environmental Footprint methods or internationally recognised third party labels (e.g. GSTC) or national schemes to make reliable green claims and to improve the environmental performance of tourism goods and services. 	<ul style="list-style-type: none"> • Industry associations to allocate budgets from memberships on training for environmental reporting and performance improvement (€ 5- 100,000); • Investment in labels (e.g. for EU Ecolabel EUR 200/600 for SMEs for application fee + variable annual fees + staff time cost).

⁹¹ European Commission (n.d). Green Public Procurement. Available at https://ec.europa.eu/environment/gpp/eu_gpp_criteria_en.htm

3 Digital transition

The Digital tourism transition includes five priority topic areas aimed at making the European tourism ecosystem more digital, innovative and competitive. In the co-creative consultation process, a wide range of topics was initially discussed with the aim of digitalising the tourism ecosystem. These propositions included discussions around creating a shared tourism data space and ontology, developing regulations for digital sharing platforms, expanding the digital information, developing smart tourism destinations, digitalising tourism offers, creating virtual content and real-time services, and developing digital competencies for SMEs. All these issues were throughout the process condensed into five priority areas: developing a European tourism data space; digital information of tourism offer for informed decision making; virtual technologies for tourism services; real-time management and provision of personalised tourism; and digital capacities of destinations and tourism SMEs. While some of the initially discussed issues may not be included as explicit topic areas, they are all embedded in the transition within the five priorities.

3.1 European tourism data space

Feasibility level: B

Developing a common language (ontology) framework for using data is a priority area within the digital transition. Data access and sharing between public and private actors can contribute to establishing innovative tourism services that support sustainability (e.g. tourism mobility and transport), managing tourism flows based on real-time data (e.g. crowd management at attractions), supporting tourism demand and supply to meet more effectively (e.g. over-tourism) or generating data and statistics to inform policy and decision making⁹². The data space needs to be interoperable in itself and connected with other data spaces outside of the tourism industry (e.g. Data Spaces Support Centre, the Mobility DS) to develop a holistic data economy for the European ecosystem. The need for a shared European tourism data space was highlighted in the stakeholder online consultation as a topic of upmost importance and benefit, mentioned by 100% of the stakeholder groups (e.g. national administrations, DMMOs, research institutions, business associations and businesses). They highlighted especially the need for SMEs to access the data held by booking platforms, which concerns them and could provide beneficial insight for their business development.

The role that innovative data plays in analysing and measuring tourism activity has been recognised by Eurostat⁹³. At the same time, the creation of European data spaces is one of the main tools announced in the 2020 European Data Strategy, in order to create a single market for data that will ensure Europe's global competitiveness and data sovereignty⁹⁴. Common European data spaces will be developed for strategic economic sectors and domains of public interest, where the use of data will have a systemic impact on the entire tourism ecosystem and its citizens. The European Tourism data space would support different elements of tourism as mentioned above, and should be linked with the other data spaces, such as the Data space for Cultural Heritage⁹⁵ and Common European Mobility Data Space⁹⁶.

⁹² Tourism Statistic: Early adopters of big data? Eurostat statistical working papers, 2017 edition. Available at: <https://ec.europa.eu/eurostat/documents/3888793/8234206/KS-TC-17-004-EN-N.pdf/a691f7db-d0c8-4832-ae01-4c3e38067c54?t=1506596381000>

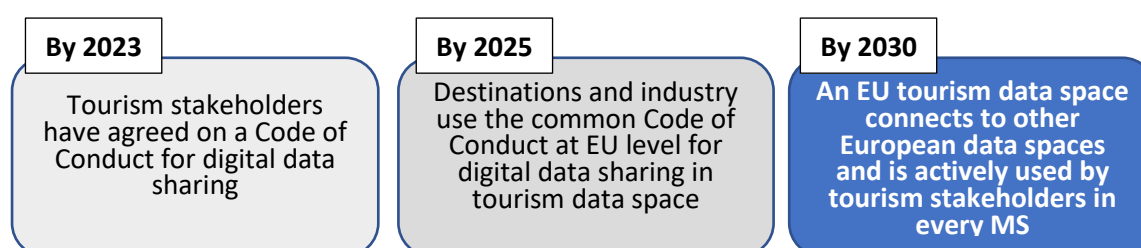
⁹³ https://ec.europa.eu/commission/presscorner/detail/es/ip_20_194

⁹⁴ <https://digital-strategy.ec.europa.eu/en/policies/strategy-data>

⁹⁵ <https://digital-strategy.ec.europa.eu/en/news/commission-proposes-common-european-data-space-cultural-heritage>

⁹⁶ <https://digital-strategy.ec.europa.eu/en/events/workshop-common-european-mobility-data-space>

The preparatory action, for which the call opened on 17th November 2021 under the Digital Europe Programme, will lay the foundations of a future data space. The objective of the preparatory action will establish a multi-stakeholder data governance, an inventory of existing data platforms for tourism and a blueprint for tourism-specific building blocks. It could contribute to the long-term convergence of existing and new data-related initiatives in tourism by making use of the data space technical infrastructure. The preparatory action will support the deployment of these data spaces for tourism, propose sustainable business models and incentives schemes to motivate participants to share data and ensure access and sharing of data by SMEs. The Data Governance Act forms the basis to ensure a fair allocation of data value and support the trust in data transactions⁹⁷ and the tourism data space can also benefit from the Livingin.eu⁹⁸ declaration in order to help define open standards and common technical specifications, such as the ten OASC Minimal Interoperability Mechanisms (MIMSPplus), following the principle of minimal interoperability.



Measurement of targets:

- The target for 2023 could be measured by the existence of a Code of Conduct for digital data sharing
- The 2025 target could be measured by a survey or a study of the use of the common Code of Conduct
- The 2030 target could be measured by an ad-hoc study on data sharing practices between tourism stakeholders in the Member States

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To facilitate collaboration between stakeholders for agreeing on identifying use cases and requirements towards a Code of Conduct for data sharing on tourism, which supports agreements for access and sharing data while preserving legal rights and commercial interest of all actors • To support developing a data interoperability framework for tourism data • To support coordinated data sharing on European level, linked with the EU Tourism Dashboard 	<ul style="list-style-type: none"> • Call for Coordination and Support Action under Digital Europe (€500,000 once, plus ongoing staff support). • Resources for Eurostat and EU Tourism Dashboard to explore innovative approaches to tourism statistics and indicators (€50,000 once, plus ongoing staff support).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To develop a data sharing strategy and systems to collect, analyse and share tourism data 	<ul style="list-style-type: none"> • Resources for National Statistical Institutes / Statistical Offices to develop tourism data sharing and analysis systems to contribute to

⁹⁷ Data Governance Act (ec.europa.eu) <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52020PC0767>

⁹⁸ <https://living-in.eu/>

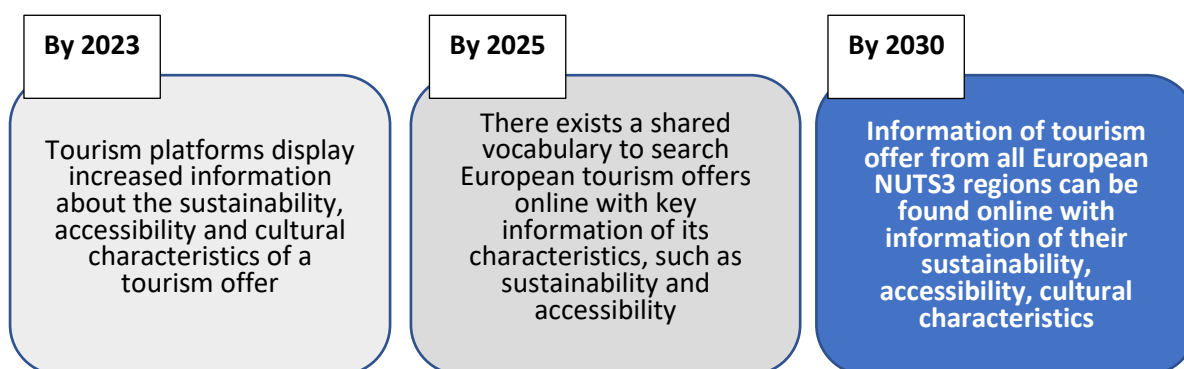
<ul style="list-style-type: none"> • Interlink databases and apply the only-once principle for data collection and use the Minimal Interoperability Mechanisms (MIMS Plus) • To support collaboration and partnership between public and private actors to participate in data sharing through use cases and pilot projects 	<p>European data space (€100,000 once).</p> <ul style="list-style-type: none"> • Resources for National Tourism Organisations to develop tourism data approaches (€100,000s once). • Resources for case collection and pilot projects to encourage public/private data generation, sharing and using (€100,000s once).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To co-create and later implement national or regional tourism data strategies • To organise awareness raising campaigns on the value of data sharing and support data sharing by SMEs; • To organise data hackathons to innovate local data sharing approaches 	<ul style="list-style-type: none"> • Resources for awareness raising campaigns to SMEs on data sharing and access (€25,000 per annum). • Funds for organising Hackathons (this can be done from small-scale efforts costing €10,000s to large or re-occurring hackathons costing €50,000).
Industry	
<ul style="list-style-type: none"> • To participate in developing a Code of Conduct for digital data access and sharing by tourism SMEs which supports agreements for sharing data while securing access and preserving legal rights and commercial interest of all actors • To establish data sharing partnerships following the Code of Conduct • To develop the competences to share, use and access tourism data for improving tourism services in real-time. 	<ul style="list-style-type: none"> • Resources to develop data-based services and partnerships (€5-20,000 per annum) • Resources for data skills training for current staff (€10,000 once), and to contract new staff with data expertise (€20-50,000 per annum)

3.2 Digital information of tourism offer for informed decision making

Feasibility level: B

The pandemic acts as a digital accelerator, with 93% of tour operator services having a website, and 59% having online booking, reservation or ordering possibilities in 2020⁹⁹. A recent Eurobarometer on tourism¹⁰⁰ showed that tourists frequently use online tools to make travel and tourism decisions, but have difficulties in finding information on specific aspects, such as sustainability, accessibility, suitability of services for children, to name but a few. Digital information about tourism should be accessible for everyone, including people with disabilities. The same Eurobarometer showed that culture and nature play a key role in selecting destinations, and Booking.com's annual sustainability report from 2021¹⁰¹ suggests that 61% of travellers would more likely choose an accommodation that has implemented sustainability measures, and 65% were interested in finding authentic experiences that relate to local culture. These findings highlight the importance of travellers having such information available at the time when they choose their destination, accommodation, and services. Digital information availability and labels about tourism products for informed consumer decision making was highlighted in the stakeholder online consultation as a topic of importance by all stakeholder groups.

European approaches, which support making available coherent information of the tourism offer, include EU ecolabel¹⁰², European Tourism COVID-19 Safety Seal¹⁰³, Natura 2000 logo¹⁰⁴, and the accessibility label defined by the European Network for Accessible Tourism (ENAT)¹⁰⁵. National projects exist to develop ontologies that support making information of different types of tourism offer available, for example in France¹⁰⁶. Such approaches are important, as although destination management organisations provide information of local services on their websites, they may not be able to list all the possible SMEs that provide services relevant for tourists. Therefore, it was proposed in the stakeholder workshops to implement a mechanism that would make it possible to search online through common vocabulary any European tourism services, e.g. criteria and labels, which would also facilitate creating a common online marketplace where the supply and demand could meet, ensuring a mechanism that is accessible to everyone, including people with disabilities.



⁹⁹ <https://ec.europa.eu/docsroom/documents/45977>

¹⁰⁰ <https://europa.eu/eurobarometer/surveys/detail/2283>

¹⁰¹ <https://globalnews.booking.com/download/1037578/booking.comsustainabletravelreport2021.pdf>

¹⁰² <https://ec.europa.eu/environment/ecolabel/>

¹⁰³ https://ec.europa.eu/growth/news/new-european-tourism-covid-19-safety-seal-available-2021-05-19_en

¹⁰⁴ <https://ec.europa.eu/environment/nature/natura2000/>

¹⁰⁵ enat-annual-report-2020-20210930.pdf (accessibletourism.org)

¹⁰⁶ <https://info.datatourisme.gouv.fr/fonctionnement/ontologie/>

Measurement of targets:

- The 2023 target could be measured through an ad-hoc study of tourism platforms
- The 2025 target could be assessed by the existence of a shared ontology
- The 2030 target could be assessed based on further development of “tourism Internet listings” indicator of the EU Tourism Dashboard or through an ad-hoc study

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To coordinate developing a shared ontology for tourism offers with industry stakeholders (e.g. hotels, transport, museums, restaurants, micro tourism / niche / ancillary services and experiences, with characteristics describing their environmental sustainability, cultural authenticity, accessibility, and types of tourism); • To foster the uptake and awareness of recognised, sustainability, accessibility and health labels, coordinate stakeholders to agree on a list of recommended labels for services; • To follow the consumer perception of information availability on tourism goods with annual Eurobarometer surveys; • Stakeholder coordination to facilitate customer rating standardisation to improve the reliability of rating systems 	<ul style="list-style-type: none"> • Meetings and networking with stakeholders on developing a shared ontology and collaborating on standardising customer ratings (€100,000 once). • Resources for Eurobarometer surveys (€50,000 once, plus ongoing staff support). • Support for SMEs and micro-businesses to take up sustainability and accessibility labels and make their information digitally available through COSME actions (€500,000 once)
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To provide funding for SMEs to develop digital information of tourism offers; • To use existing recognised quality systems and support tourism SMEs to certify their services with environmental, health and accessibility labelling; • To develop awareness campaigns for consumers about evaluating and recognising information on sustainable and accessible tourism goods and services and labels 	<ul style="list-style-type: none"> • Resources to support tourism SMEs in developing their sustainability and digital information availability, benefiting from cohesion funds and NRRPs where applicable (€100,000 per annum).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To develop destination awareness campaigns of the importance of providing information of tourism services online including labels on sustainability, cultural authenticity and accessibility; • To increase awareness of residents and visitors about sustainable goods and services and in particular the ones with the EU Ecolabel or internationally recognised and recommended third-party validated labels in the destination; 	<ul style="list-style-type: none"> • Resources for awareness raising campaigns for SMEs on the importance of providing information and key characteristics of sustainability and accessibility (€25,000 per annum). • Resources for coordinated marketing initiatives to promote the sustainability, cultural and accessibility characteristics of local

<ul style="list-style-type: none"> To support local tourism actors to offer and describe their services via the digital information space on their own platforms. 	products and services (€50,000 per annum).
Industry	
<ul style="list-style-type: none"> To provide clear information of tourism offers online for consumers to make informed decisions, e.g. on green options, accessibility, targeted tourist groups; To participate in intra-industry marketing efforts to communicate sustainable tourism products; To use instruments like the EU Ecolabel, EMAS, Natura 2000 logo, COVID-19 Health and safety label or national schemes to improve quality and sustainability of services and market them with recognised standards. 	<ul style="list-style-type: none"> Resources to invest in labelling (EU Ecolabel, EMAS, Natura 2000 logo, national schemes and provide sustainability features in products by default) (€1,000- €5000 per annum), and human resources time for assessment and implementation Resources to invest in labels (e.g. for EU Ecolabel €200/€600 for SMEs for application fee + variable annual fees)

3.3 Virtual technologies for tourism services

Feasibility level: C

Digital technologies have become, more than ever, essential to working, learning, socialising, enjoying entertainment and accessing a wide range of services and products from health services to culture.¹⁰⁷ Digitalised cultural offers, such as virtual museum visits or concerts create new interests and attract audiences for real-life visits¹⁰⁸. These tools provide also new means to contribute to the preservation of natural and cultural resources at risk, while enabling real-like visitor experiences. Beyond sites at risk, virtual, hybrid and augmented reality can enhance visitor experiences by enabling extended participation (e.g. people at home interacting with a destination, site or event), or experiencing the digital reconstruction of historical or foreseen future developments of natural and cultural sites. They can also be used to engage the customer with the tourism experience before and after travel, thereby extending the engagement with the service also in time. Digitally enhanced and new forms of virtual tourism products were highlighted in the stakeholder online consultation as a topic of increasing interest.

Virtual technologies are recommended to digitalise and extend tourism services and experiences. Within that, one area of priority is the recommendation of the European Data Space for Cultural Heritage, which emphasises the need to accelerate the digitisation of cultural heritage assets¹⁰⁹. The European platform currently covers 52 million cultural heritage assets, with a plan to further digitalise



¹⁰⁷ COM(2021) 118 final

¹⁰⁸ See examples at: <https://www.ef.com/wwen/blog/language/virtual-tour-europe-experience-destinations-online/>, <https://www.wanderlust.co.uk/content/best-virtual-tours-of-europe/>

¹⁰⁹ <https://digital-strategy.ec.europa.eu/en/news/commission-proposes-common-european-data-space-cultural-heritage>

40 million high quality types of assets. These can provide an important contribution to national and destination resources, which can be used to enhance their digitally enhanced tourism services. The targets of this action broaden the scope to the entire tourism industry to digitalise tourism services and offer virtual experiences across the industry.

Measurement of targets:

- The 2023 target could be assessed by the existence of such a compendium
- The 2025 target could be assessed through an ad-hoc desk study of DMMO strategies
- The 2030 target could be assessed through the follow-up of the digitisation goals of the Recommendation on a common European data space for cultural heritage

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To support and follow the implementation of the common European Data Space for Cultural Heritage • To provide R&I support for developing pilot projects of virtual destinations offers • To collect best practices of innovative tourism approaches which include digital virtualisation 	<ul style="list-style-type: none"> • Calls under Horizon Europe and Creative Europe (€5,000,000 once). • Study to collect best practices (€25,000 once, plus ongoing staff support).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To support the visibility of companies, business, and destinations that have developed a successful digital and virtual offer • To support SMEs and cultural heritage sites in destinations with technical assistance, training and funds to digitise their cultural and natural assets and to develop new types of virtual tourism experiences • To develop pilots for digital experiences in rural, insular and peripheral areas in collaboration with SMEs / micro enterprises 	<ul style="list-style-type: none"> • Resources for best practice promotion on virtual tourism services (€50,000 per annum). • Resources to digitise cultural and natural assets and develop virtual tourism services (this can be done from small-scale efforts costing €25,000s to large projects costing €100,000s once, and support/update costs per annum).
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To develop a local digital strategy for virtualising the offer of tourism experiences and attractions • To collaborate with start-ups and stakeholders to develop digital pilot prototypes to support local tourism with virtual experiences, gamification and augmented reality. 	<ul style="list-style-type: none"> • Resources for digitisation of cultural and natural assets, benefiting from national and European funding (€50,000 once). • Resources for creating and making available digital prototype solutions supporting the destination digital strategy (this can be done from small scale prototypes costing €10,000s to large projects costing €100,000s once, and support/update costs per annum).
Industry	
<ul style="list-style-type: none"> • To develop virtual, digital and augmented reality experiences to provide digital tourism offers that engage the customers before and after travel • To develop augmented reality solutions to enhance on-site experiences 	<ul style="list-style-type: none"> • Resources to create content and technological infrastructure to digitalise tourism offers (e.g. 360 degree videos, augmented reality apps, virtual platforms) (this can be

<ul style="list-style-type: none"> • To digitise cultural heritage sites and buildings at risk or with high visiting rates 	<p>done from small scale prototypes costing €2,500s to large projects costing €50,000s once, and support /update costs per annum).</p> <ul style="list-style-type: none"> • Resources for skills to innovate new tourism services based on virtual reality resources (staff time in small firms, or the salaries for 1-3 members of staff for larger firms).
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3.4 Real-time management and provision of personalised tourism

Feasibility level: B

Technology provides opportunities for local communities and the industry to better manage tourism flows from the perspective of the destination (managing carrying capacities of vulnerable areas), as well as from the personal perspective of the visitor (e.g. avoiding queues and crowded areas)¹¹⁰. A recent study on over-tourism for the European Parliament highlights the need for real-time data on information for tourists on, e.g. crowdedness, transport options, and alternative times to visit.¹¹¹ Real-time visitor management is of particular relevance for culturally or environmentally sensitive historic sites or for calculating the individual's carbon footprint¹¹². Real-time data services can also support different forms of tourism, such as sports. Real-time management of personalised tourism and tourism flows supported by data was highlighted in the stakeholder online consultation as a topic of interest and importance, and particularly recognised with examples by one national administration, one business association, and one business working with data.

Building on the propositions on establishing European data spaces by the European Data Strategy¹¹³, a European tourism data space that facilitates data flow between different tourism related services could allow developing data-driven destination management and tourism experiences. Recent winners of the European Smart Tourism Capital awards¹¹⁴ as well as many other destinations are already exploring such options. With effective data sharing agreements through the Tourism data space, the same tools that are based on real-time information can suggest for the tourist, which places to visit without crowds, can at the same time collect information for the destination management on visitor behaviour. Such services require effective digital connectivity in the destination and highlight the Digital Compass target to reach 5G coverage across the Europe by 2030¹¹⁵.

¹¹⁰ OECD, 2020

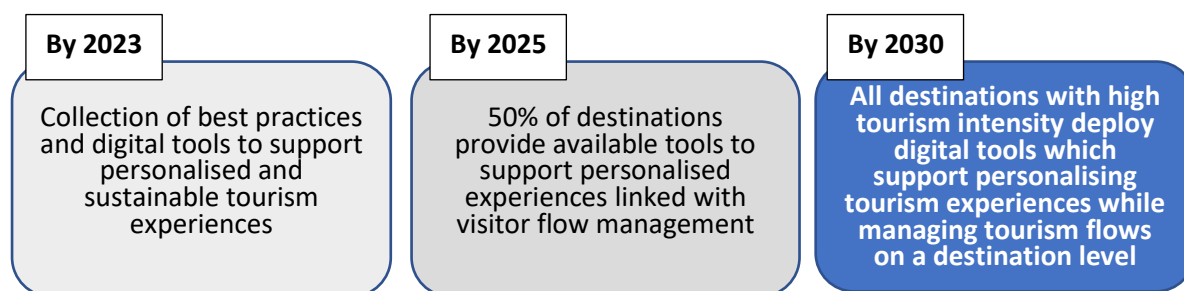
¹¹¹ [https://www.europarl.europa.eu/RegData/etudes/STUD/2018/629184/IPOL_STU\(2018\)629184_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2018/629184/IPOL_STU(2018)629184_EN.pdf)

¹¹² Bremner, 2019

¹¹³ <https://digital-strategy.ec.europa.eu/en/policies/strategy-data>

¹¹⁴ https://smart-tourism-capital.ec.europa.eu/index_en

¹¹⁵ https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en



Measurement of targets:

- The 2023 target could be assessed based on existence of such collection
- The 2025 target could be assessed based on an ad-hoc survey study to destinations in collaboration with stakeholder networks
- The 2030 target could be assessed based on a study targeted to destinations recognised as “high tourism intensity” based on the EU Tourism Dashboard indicator¹¹⁶

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To support best practices collection and exchange of data-driven digital tools • To facilitate the development of a European tourism data space and participation of DMMOs and SMEs to data sharing and data-driven tourism services deployment 	<ul style="list-style-type: none"> • Study on best practices collection (€25,000 once, plus ongoing staff support). • Support for SMEs on data sharing and digital services through COSME actions (€50,000 per annum).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To support public-private co-operation initiatives and sharing of successful data-driven tools and services between destinations • To support the development of open data sets and real-time data flows of public actors to encourage data-based innovations in tourism • To develop real-time data innovation pilots and know-how for DMMOs and SMEs 	<ul style="list-style-type: none"> • Resources to support public-private collaborations on real-time data sharing (€50,000 per annum). • Resources to support destinations for sustainable data-driven management, benefiting from NRRPs where applicable (€50,000 per annum). • Resources for data innovation pilots on national and regional level (this can be done from small-scale pilots costing €25,000s to large projects costing €100,000s once, and support/update costs per annum). • Resources from regional authorities for providing flexible and immediate micro funding for SMEs (this can be done from micro-funds for €5,000 to large funding costing €10,000s once).

¹¹⁶ This indicator measures the economic dependency on tourism, potentially revealing overtourism and vulnerability to demand shocks. It is calculated by dividing the number of nights spent at tourist accommodations by local population. Lower values indicate lower intensity. Source: EUROSTAT

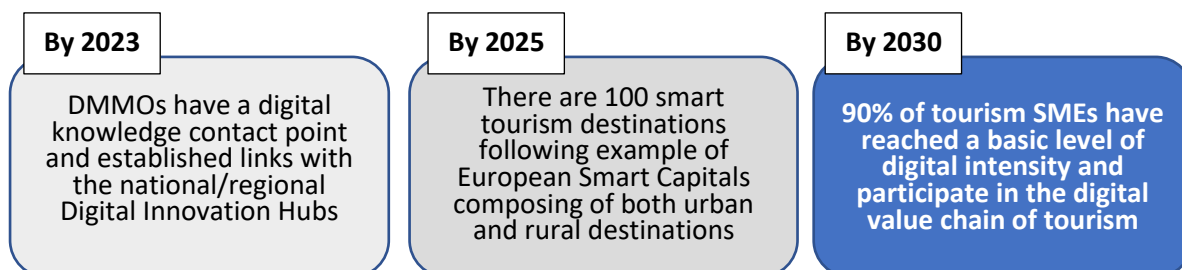
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To encourage innovative collaborations between SMEs, start-ups, technology and education institutions • To inform SMEs of existing best practices and available data-driven tools and data sources • To organise Hackathons to develop innovative data-driven personalised tourism concepts for the locality 	<ul style="list-style-type: none"> • Resources for hackathons (this can be done from small-scale efforts costing €10,000s to large or re-occurring hackathons costing €50,000). • Resources to establish data-driven destination management mechanisms (this can be done from small scale costing €5,000 to large systems costing €10,000s once, and support/update costs per annum).
Industry	
<ul style="list-style-type: none"> • To collaborate with DMMOs to link with their data sharing offer and needs while developing data-driven tourism services • To experiment and collaborate with educational institutions to establish innovative partnerships for new applications for personalised tourism • To connect with digital innovation hubs and collaborate with other stakeholders for digital innovations for tourism. 	<ul style="list-style-type: none"> • Resources for participating with employees in innovation pilot projects and hackathons (primarily time from current staff). • Resources for adopting existing digital tools available (depending on system size and scope, this can range from €10,000s once, and subscription/support costs per annum, and staff time). • Resources for developing own digital tools for experience personalisation (e.g. customer relationship management tool) (depending on system size and scope, this can range from €10,000s once, and support costs per annum, and staff time).

3.5 Digital capacities of destinations and tourism SMEs

Feasibility level: B

EU tourism SMEs are generally characterised by a low degree of digitalisation, suffering from the lack of skills, finance, infrastructure as well as mentoring and policy support.¹¹⁷ Although currently most of the enterprises do have Internet access, they do not necessarily use technologies for supporting their work processes or interactions with clients. Eurostat data shows that several digital economy and society indicators are especially low in the accommodation and food and beverage services, such as the use of social media and Internet advertising (69% in 2019) or using electronic invoices in supply chain management (27% in 2020). Skills for considering and integrating digital tools into tourism services are not only important for marketing but for facilitating more efficient processes and developing innovative and better services to meet the changing demand, trends (e.g. virtual reality, big data, blockchain, digital nomads) and expectations of the customers. The collaboration of stakeholders (e.g. governments, investors, academia, SMEs, innovation incubators and hubs) is critical for skills development and knowledge flows for digital capacity development and updates. The importance of digital empowerment of SMEs and skilling was highlighted in the stakeholder online consultation as a topic of 100% consensus across all stakeholder groups and identified as one of the most urgent and fundamental actions in the digital transition.

The Digital Compass for 2030 defines the targets for Europe's digital transformation, focusing on four key aspects: Skills, Infrastructures, Business and Government (public services)¹¹⁸. All of these are relevant for tourism stakeholders: Developing the digital skills of the workforce; ensuring good internet connectivity to all tourism destinations; digital transformation of the business processes. The progress of the SMEs is measured with the Digital Economy and Society Index (DESI)¹¹⁹. The EU Tourism Dashboard also visualises some digital indicators for the tourism ecosystem on national and regional level.



Measurement of targets:

- The 2023 target could be measured by a survey to DMMOs in collaboration with stakeholder collaboration networks
- The 2025 target could be assessed based on a survey study of destinations
- The 2030 target is linked to the Digital Compass 2030 target for all European SMEs and could be assessed as part of the follow-up of the digital strategy

¹¹⁷ Dredge et al. (2019). Digitalisation in Tourism, Available at : <https://ehrl.ee/wp-content/uploads/2019/01/Digitalisation-in-Tourism-Report-2018.pdf>

¹¹⁸ https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en#international-partnerships-for-the-digital-decade

¹¹⁹ <https://digital-strategy.ec.europa.eu/en/policies/desi>

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To support the development of Digital Innovation Hubs across MS and regions • To streamline the work on smart cities (Intelligent Cities Challenge, Smart Destinations, Living-in.eu, Urban Agenda) and widen the scope to as many destinations as possible • To support digital infrastructure development and 5G coverage as defined in the Digital Compass • To create an active best practice exchange mechanism for SMEs and destinations 	<ul style="list-style-type: none"> • Support for digital infrastructure and capacity development through Digital Europe (€5.000.000 per annum)
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To support the links between the Digital Innovation Hubs with tourism authorities and DMMOs • To develop the technology infrastructure to close the gap of connectivity between urban and rural/remote destinations in collaboration with the Digital Innovation Hubs • To pay attention to digital skills provision for tourism SMEs under national and regional skills partnerships established under Pact for Skills. 	<ul style="list-style-type: none"> • Resources to network and exchange practices with other destinations on digitalisation (€25,000 - €100,000s per annum dependent on needs and country) • Investment to provide digitalisation support for SMEs (€25,000 - €100,000s per annum dependent on needs and country)
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To establish digitalisation objectives following the examples of smart destination networks (Intelligent Cities Challenge, Smart Destinations, Living-in.eu) • To establish a contact point (in-house or external service) in larger DMMOs that links with Digital innovation hubs, coordinates digital trainings and provides support on digitalisation for SMEs in the destination 	<ul style="list-style-type: none"> • Resources to network and exchange practices with other destinations on digitalisation (€25,000 per annum) • Investment to provide digitalisation support for SMEs (this can be done from small scale costing €10,000 to large support costing €10,000s once)
Industry	
<ul style="list-style-type: none"> • To develop a web presence (e.g. website or social media presence and an active follow-up of relevant review sites) as a first gateway effort into more advanced digitalisation • To evaluate the benefits of integrating digital tools to facilitating business processes and service provision • To ensure digitally skilled personnel participation in business strategy development 	<ul style="list-style-type: none"> • Resources to ensure updated digital skills availability in the company (staff time and 0-€2000 per annum per employee) • Investment in digital tools for business processes (resource management, invoicing, accounting, workforce management) and customer interaction (marketing, reservations, online reviews) (this can be done from small scale costing €5,000 to large processes costing €10,000s once, and technical support per annum). • Time resources to network and follow activities of digital innovation hubs (primarily current staff time)

4 Equality and accessibility in tourism

4.1 Tourism services and facilities accessible to all

Feasibility level: C

Tourism services should support access for all on an equal basis and accessibility for persons with disabilities and older people. Greater physical, communication and web accessibility allow more consumers to enjoy tourism experiences and increases the potential market for tourism providers (e.g. ‘silver’ tourists over 55 already account for 41% of all tourism nights)^{120, 121}. There are approximately 87 million persons with some form of disability in the EU¹²², and in 2020, 20.6% of the EU population was aged 65 or over¹²³. These are significant consumer segments for tourism, visiting and travelling with their family and friends. Pre-pandemic data on the reasons why Europeans did not make tourism trips in 2019, shows that 24% of “non-tourists” mentioned health problems as one of the main reasons for not taking holidays but among elderly citizens (aged 65 or over) nearly half indicates health issues as a reason for not travelling (47%)¹²⁴.

Therefore, all forward-looking investments in the tourism ecosystem should contribute to equal access and accessibility. Current offerings are not sufficient and there continues to be a lack of awareness about the need for accessibility within the industry¹²⁵. The need for accessibility for all was extensively discussed during the online stakeholder consultations; NGO stakeholders mostly emphasised the need to improve accessibility for persons with disabilities but also promote access for other specific groups who may be excluded or discriminated against tourism (e.g. the elderly, LGBTQ community, low-income households). Other stakeholders highlighted the need for greater accessibility of destinations and offerings in general. On this matter, Eurostat data (EU-SILC) shows that more than 1 in 4 households (28%) in the EU cannot afford to pay for one week of annual holiday away from home¹²⁴.

Accessibility is an enabler of rights for persons with disabilities, as well as other potentially excluded groups (e.g. youth, low-income families, seniors), and accessible tourism is key to support their participation in tourism related activities. This prerequisite appears clearly, among others, in the UN convention on the rights of persons with disabilities¹²⁶, the global code of ethics for tourism¹²⁷, the Strategy for the Rights of Persons with Disabilities 2021-2030¹²⁸, the Council of Europe recommendation on ageing^{129, 130} and disability and its resolution on universal design¹³¹ to achieve full participation. In addition, the ISO 21902 standard deals with Accessibility in Tourism¹³². The European

¹²⁰ <https://ec.europa.eu/growth/tools-databases/vto/content/economic-impact-and-travel-patterns-accessible-tourism-europe>

¹²¹ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_trends_and_ageing

¹²² Data: EU SILC (Statistics on Income and Living Conditions) and EU LFS (Labour Force Survey). 24.7% of EU population > 16 years are limited in their activities, 17.7% having moderate, 7% severe limitations; S. Grammenos/M. Priestley, 2020: <https://www.disability-europe.net/downloads/1046-edc-task-2-1-statistical-indicators-tables-eu-silc-2018>

¹²³ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Population_structure_and_ageing

¹²⁴ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_statistics_-_participation_in_tourism

¹²⁵ <https://ec.europa.eu/docsroom/documents/10421>

¹²⁶ <https://www.un.org/development/desa/disabilities/convention-on-the-rights-of-persons-with-disabilities.html>

¹²⁷ <https://www.unwto.org/ethics-culture-and-social-responsibility/en/content/global-code-ethics-tourism>

¹²⁸ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021DC0101&from=EN>

¹²⁹ <https://wcd.coe.int/ViewDoc.jsp?id=1470069&Site=CM>

¹³⁰ <https://wcd.coe.int/ViewDoc.jsp?id=1470069&Site=CM>

¹³¹ https://search.coe.int/cm/Pages/result_details.aspx?ObjectID=09000016805d46ae

¹³² <https://www.iso.org/standard/72126.html>

Network for Accessible Tourism (ENAT) has developed a label for tourism businesses that recognises efforts to promote accessible travel and tourism and is working on an accessible tourism directory where providers of accessible tourism can register. The European Commission's initiative "the European Capital of Smart Tourism" includes accessibility as one of the four key criteria¹³³.

Infrastructure investments can focus on developing sustainable infrastructure alternatives (including for example, bike and car sharing schemes) that allow for greater accessibility and mobility opportunities for all^{134,135}. It can also focus on improving accessibility for target groups that are known to require high quality accessibility (e.g. persons with disabilities or the 'silver' economy) either via physical infrastructure, specific products (e.g. cultural tourism) or additional training and services¹³⁶. The solidary and social economy also may provide opportunities and examples with regard to social infrastructures on this matter, both for tourists and tourism workers. As further discussed in section 3.3 virtual technologies can also contribute to greater accessibility. Research and Innovation on this are ongoing and the quality of VR (as well as) AR experiences have improved strongly because of this over time and can be expected to provide even better services in the future.



Measurement of targets:

- The 2023 target could be measured by assessing the availability of training materials and approaches
- The 2025 target could be measured by surveying and assessing a representative sample of CSR reports of tourism companies
- The 2030 target could be measured by an ad-hoc study on tourism offerings that are accessible to all within a representative selection of destinations

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • Pursue implementing the European Disability card at the EU level in collaboration with MS • Further promote accessibility for persons with disabilities as well as other groups possibly suffering from lack of access, as part of the European Capital of Smart Tourism • Launch a study to evaluate the accessibility in the widest sense of tourism offered in EU destinations • Support removal of barriers and incentivizing of investments to create greater accessibility 	<ul style="list-style-type: none"> • Resources for communication and reach-out on the importance of accessibility in tourism (€50.000 once and ongoing staff time per annum) • Support for SMEs under COSME actions to support the accessibility of their services (€50.000 per annum)

¹³³ https://smart-tourism-capital.ec.europa.eu/index_en

¹³⁴ <https://keep.eu/projects/21456/Mobility-Opportunities-Valu-EN/>

¹³⁵ <https://keep.eu/projects/114/ACCESSIBLE-CITIES-OF-EUROPEAN-EN/>

¹³⁶ <https://keep.eu/projects/19504/Accessible-Tourism-EN/>

<ul style="list-style-type: none"> Consider inclusion of tourism in General Block Exemption to stimulate investments in greater accessibility 	<ul style="list-style-type: none"> Support multi-country projects to maximise investments under the Recovery and Resilience Facility and Horizon Europe programme 50/200M).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> To improve the adherence of stakeholders to the ISO 21902 standard for Accessibility in Tourism, as well as national standards Develop legislation and financial tools to ensure that persons with disabilities have access to tourism facilities in line with the obligations under the UNCRPD Awareness raising about the importance of accessibility in the widest sense and being welcoming to all (including e.g. LGBTQI community). To stimulate greater accessibility and remove barriers for visitors <i>and</i> residents To apply existing EU rules on accessible public procurement and promote and raise awareness on this in tourism 	<ul style="list-style-type: none"> Resources to support Destination Marketing and Management Organisations and tourism companies to enhance accessibility of their services and facilities (one full time staff member) Resources for awareness raising campaigns on accessibility in travelling, hospitality, cultural resources and other tourism attractions (€5.000 to 100.000 per annum) Structural investments in greater accessibility of places and destinations through NRRP when possible (€50/200M, depending on national plans)
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> To promote good practices with regards to design-for-all and ensure disability training for tourism professionals to make destinations more (digitally) accessible and increase visibility on the issue To develop a monitoring system (at national or local level) to collect data on actual accessibility for accommodation and other tourism services To ensure regular access to professional skills (in-house or outsourced) to develop accessibility and off-season tourism opportunities 	<ul style="list-style-type: none"> Resources for promotion, communication, training and monitoring accessibility of tourism (€5.000 to 50.000 per annum) Municipality support for enhancing accessibility of travel infrastructure, cultural establishments and attractions (time from current staff or €20.000 if outsourced)
Industry	
<ul style="list-style-type: none"> To increase inclusive marketing and accessibility of services and facilities, also among SMEs To include inclusivity and accessibility strategies, also for tourism jobs, as part of CSR reporting To include accessibility considerations in the widest sense for the development of digital tourism offer and information 	<ul style="list-style-type: none"> Training of personnel to consider accessibility (staff time in small firms; 1 full time staff member for larger firms) In-house or outsourced expertise to consider accessibility in marketing, service development and CSR reporting (staff time in small firms; 1 full time staff member for larger firms)

4.2 Equality and good quality of tourism jobs

Feasibility level: B

The tourism ecosystem employs more female than male workers - with the highest proportions in accommodation, travel agencies and tour operators – and 13% of people employed in the tourism ecosystem were young workers¹³⁷. Hourly earnings and labour costs are, however, significantly lower than in the total economy and with a relatively high proportion of temporary contracts and lower job seniority¹³⁷. Although the importance of fair and equal pay and opportunities for all in the tourism jobs, without discrimination due to gender, nationality, age or ethnicity is generally acknowledged, this is not a given, even at the board level of companies^{138,139,140}. Women in tourism earn about 15% less than their male counterparts on a global level remain substantially underrepresented as leaders and they make up only 21% of board members in tourism businesses^{141,142}. In addition, challenges exist about platform work, particularly with regard to the unclear employment status and social protection of platform workers¹⁴³.

Good quality of tourism jobs, appreciation of relevant qualifications and experience encourages career development and work satisfaction while it also contributes to better service and customer experiences. In addition, it can help improve the image and attractiveness of tourism jobs, which may contribute to an increase of potential new workers. The tourism pact for Skills focuses on increasing skills for the tourism workforce, but also works against discrimination, gender inequality and a lack of equal opportunities¹⁴⁴. To ensure that new models of platform jobs are fair for workers and employers alike, the EU has prepared a Digital Services Act and other initiatives to set up fair minimum wages¹⁴⁵. The Commission measures to improve the working conditions in platform work¹⁴⁶, developing guidelines about collective agreements regarding the working conditions of solo self-employed people¹⁴⁷ and Social Economy Action plan¹⁴⁸ address several issues important for people working in the tourism ecosystem. Stakeholders both in the online consultation and workshop discussions identified both equality and good quality of jobs as important points to ensure rebuilding of tourism after COVID-19.

The Portuguese Presidency of the Council of the European Union 2021 had among its priorities the implementation of the Social Pillar of the European Union as a key element. This included equal opportunities and fair working conditions and resulted in a Social Rights action plan for a well-functioning labour market¹⁴⁹. Recent projects on this topic include those that focus on increasing

¹³⁷ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_industries_-_employment

¹³⁸ <https://www.e-unwto.org/doi/pdf/10.18111/9789284420384>

¹³⁹ https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/normativeinstrument/wcms_546337.pdf

¹⁴⁰ [https://www.europarl.europa.eu/RegData/etudes/STUD/2019/629200/IPOL_STU\(2019\)629200_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2019/629200/IPOL_STU(2019)629200_EN.pdf)

¹⁴¹ <https://www.e-unwto.org/doi/book/10.18111/9789284420384>

¹⁴² <https://eige.europa.eu/gender-mainstreaming/policy-areas/tourism>

¹⁴³ [https://www.europarl.europa.eu/RegData/etudes/STUD/2020/652734/IPOL_STU\(2020\)652734_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2020/652734/IPOL_STU(2020)652734_EN.pdf)

¹⁴⁴ <https://ec.europa.eu/social/main.jsp?catId=1517&langId=en>

¹⁴⁵ https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/digital-services-act-ensuring-safe-and-accountable-online-environment_en

¹⁴⁶ https://ec.europa.eu/commission/presscorner/detail/en/ip_21_6605

¹⁴⁷ https://ec.europa.eu/commission/presscorner/detail/en/ip_21_6620

¹⁴⁸ https://ec.europa.eu/commission/presscorner/detail/en/ip_21_6568

¹⁴⁹ https://ec.europa.eu/info/strategy/priorities-2019-2024/economy-works-people/jobs-growth-and-investment/european-pillar-social-rights/european-pillar-social-rights-action-plan_en

women's entrepreneurship¹⁵⁰, creating more socially inclusive places and tourism jobs¹⁵¹, but activities performed under the European Globalisation Adjustment Fund which has, in recent years, helped tourism workers who lost their jobs due to the COVID 19 pandemic, retrain to start their own business¹⁵². The Directive on improving working conditions of people working on digital labour platforms¹⁵³ should ensure fair working conditions and adequate social protection. Given the social nature of striving towards equality and good quality of tourism jobs, there is relatively little that investments in infrastructure can achieve. Research and Innovation within this action area could focus on understanding structural inequalities in tourism, potential of . Cultural tourism as an important form of job creation, and on ways in which tourism can contribute to more inclusive and equal societies post-COVID.



Measurement of targets:

- The 2023 target could be measured by an ad-hoc study of published CSR strategies or separately published commitments by companies
- The 2025 target could be measured by assessing whether such commitments have been published or received by a Tourism Transition Pathway follow-up platform
- The 2030 target could be measured through an ad hoc study of the quality of tourism jobs across the EU MS

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To collaborate with Member States, trade unions, industry and representatives of solidarity and social economy to improve quality of work in tourism. • To develop and follow-up measures to improve the precarious working situation of platforms workers and solo workers 	<ul style="list-style-type: none"> • Conferences, networking and awareness raising on improving quality and attractiveness of tourism jobs (€25,000 per annum).
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To develop or maintain employment legislation to improve quality of work for those in a vulnerable position, whilst considering the specifics of seasonal employment 	<ul style="list-style-type: none"> • Fund research on tourism employment equality and quality of work in comparison to other sectors (can be done from small scale efforts costing €10,000s to integrated comparative

¹⁵⁰ <https://cordis.europa.eu/project/id/792738>

¹⁵¹ <https://smartdest.eu>

¹⁵² <https://ec.europa.eu/social/main.jsp?langId=en&catId=326&newsId=9966&furtherNews=yes>

¹⁵³ https://ec.europa.eu/commission/presscorner/detail/en/ip_21_6605

<ul style="list-style-type: none"> • To ensure that all public or public-private tourism entities provide equal opportunities and good quality of work • To support SMEs on a local destination level to increase equality and quality of jobs (e.g. by providing education to small business owners and workers) • To improve access to information on job vacancies and stimulate exchange programmes for tourism workers 	<p>tasks through for example Interreg funding, raising €100,000s)</p> <ul style="list-style-type: none"> • Resources to guide and monitor that public and public-private tourism entities apply fair and equal principles for jobs (€50.000 once for setting up a monitoring system, staff time to run and maintain system) • Set up a platform for job vacancies and exchange for tourism workers (€25.000 once, staff time to maintain) • Resources to guide and monitor SMEs to adhere to legal and fair standards for work, including with working hours (€15.000 per annum)
Destination marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To promote social dialogue by stimulating the involvement of the tourism workforce and trade unions in decision-making processes on tourism in the destination • To engage with the tourism workforce and unions to highlight examples of promoting equality in working contracts without discrimination and advancing gender balance • To develop strategies to attract and keep (young) talents within the tourism ecosystem and provide work throughout the year for seasonal workers (within or outside of tourism) 	<ul style="list-style-type: none"> • Resources to set up a platform or ways to stimulate social dialogue, staff time and annual funding for provided services €0 to €50.000 per annum annually)
Industry	
<ul style="list-style-type: none"> • To report on minimum wages, working hours, equality of salaries as part of CSR reporting to increase transparency among larger tourism enterprises • To encourage and support female and minority workers to advance in higher positions • To monitor and address work environment performance and work stress, rewarding better performance with better salary • To engage with workers and unions to emphasise quality jobs and provide future growth perspective, also within SMEs and for young tourism workers 	<ul style="list-style-type: none"> • Resources to ensure equality and quality of work are considered for CSR reporting(€50.000 once for setting up a monitoring system, staff time to run and maintain system) • HR resources to support equality, career progression and follow working hours (staff time, depending on the size of firm) • Investment in longer-term working contracts and better salaries for better performance with equality between workers – in collaboration with tourism workers, also with an eye on allowing flexibility for seasonal or part-time work (longer-term working contracts can cause less flexibility; better salaries €100 - €2000 per worker per annum) • Resources to meet the demands of regulations (e.g. social security for platform workers) (€5-10,000 once)

5 Education and training for people and organisations

5.1 Training and upskilling of the workforce

Feasibility level: A

At the moment, over 20% of persons employed in accommodation and other selected tourism industries are classed as lower skilled and a relatively small amount can be classed as higher skilled^{154,155}. CEDEFOP (the European Centre for the Development of Vocational Training) emphasises the need for a general higher level of qualifications towards 48% of all jobs in Europe to be taken on¹⁵⁶. Currently, in tourism, only the travel agency, tour operator sector reaches that level (48%), overall the share of tertiary qualification in tourism is 29%^{157,158}. Differences between countries exist too, with some (e.g. Ireland, Lithuania) having nearly around 50% tertiary education workers, whereas elsewhere, these numbers are much lower¹⁵⁹. While working towards higher educational or managerial qualifications is important^{160,161}, equally important are projects aimed at providing vocational training and upskilling approaches, such as vocational tutorials and video trainings for entrepreneurs and employees^{162,163}.) Skills for considering and integrating digital tools into tourism services are not only important for marketing but for facilitating more efficient processes and developing innovative and better services to meet the changing demand trends (e.g. tourism for smart workers) and expectations of the customers

In the context of the EU Pact for Skills¹⁶⁴, European Commission invites public and private organisations to join forces and take concrete action to upskill and reskill people in Europe. This also includes vocational skills, which are important to meet the current labour shortage in the tourism ecosystem. Currently, tourism stakeholders are working on developing an agreement on skills partnerships, based on the tools developed in the blueprint for sectoral cooperation in tourism skills¹⁶⁵ led by Next Tourism Generation Alliance¹⁶⁶. In the context of the European Skills/Competences, Occupations, and Qualifications (ESCO)¹⁶⁷ the Commission in cooperation with Member States, industry and academia can work towards developing skills profiles that are needed in the tourism ecosystem and implementing (re/up)skilling services to provide these. Digital skills follow-up of different sectors is also part of the Digital Economy and Society Indicator (DESI)¹⁶⁸ and EU Dashboard visualises its values for Europe on selected tourism sectors. Several actors from different levels mentioned the importance of during the online stakeholder consultation, with particular reference to

¹⁵⁴ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_industries_-_employment; figure 7

¹⁵⁵ Cedefop (2020). Skills developments and trends in the tourism sector. *Skills Panorama Analytical Highlights*. https://skillspanorama.cedefop.europa.eu/en/analytical_highlights/skills-developments-and-trends-tourism-sector

¹⁵⁶ https://www.cedefop.europa.eu/files/3075_en.pdf

¹⁵⁷ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_industries_-_employment; table 2D

¹⁵⁸ <https://ec.europa.eu/eurostat/databrowser/bookmark/200fedca-3b0a-426e-aad6-9f17379bbc0a?lang=en>

¹⁵⁹ <https://ec.europa.eu/eurostat/web/tourism/data/database>; Employed persons by educational attainment level and Nace Rev. 2 activity

¹⁶⁰ <https://www.emtmaster.net/About-EMTM>

¹⁶¹ <https://tourism.gov.mt/en/tourism/pages/tourism-entities/advance.aspx>

¹⁶² <https://keep.eu/projects/26395/Agro-and-tourism-business-ac-EN/>

¹⁶³ <https://keep.eu/projects/19212/Deployment-of-high-standard-EN/>

¹⁶⁴ <https://ec.europa.eu/social/main.jsp?catId=1517&langId=en>

¹⁶⁵ https://skillspanorama.cedefop.europa.eu/en/useful_resources/blueprint-sectoral-cooperation-skills-tourism

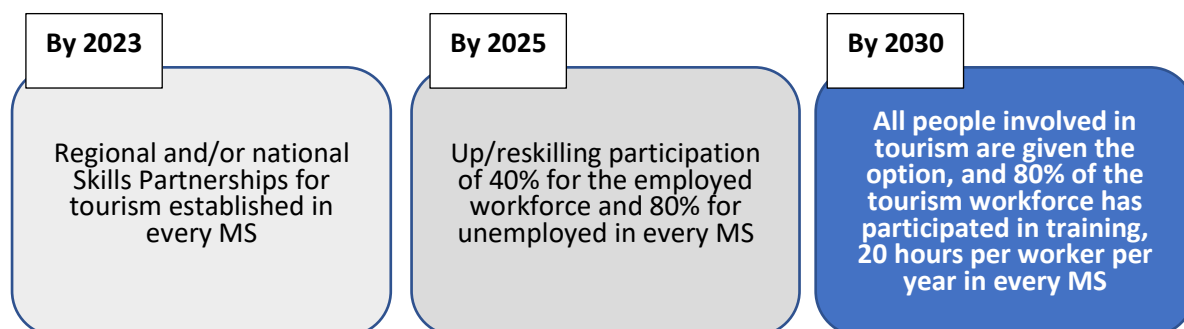
¹⁶⁶ <https://nexttourismgeneration.eu/>

¹⁶⁷ <https://ec.europa.eu/esco/portal/home>

¹⁶⁸ <https://digital-strategy.ec.europa.eu/en/policies/desi>

the development of large-scale skills partnerships under the EU Pact for Skills for the tourism ecosystem.

Research and Innovation are expected to focus not only on newly starting tourism workers, but also on lifelong learning and increasing skills among the existing tourism workforce¹⁶⁹. Technological advancements can provide skills development in new, more engaging and easier ways to reach and provide skills to an increasing number of employees¹⁷⁰, although it is useful to remain aware that technological advancements (e.g. in robotics) may also reduce tourism jobs in the long run. As such, there is a need to develop training and skills that fit with future (sustainable and digital) requirements within the tourism ecosystem.



Measurement of targets:

- The 2023 target could be measured by the monitoring mechanism of the Pact for Skills; Launching of the partnerships will start in 2022
- The 2025 target is linked to the final commitments agreed under the Pact for Skills and its measurement could be decided by the follow-up and monitoring mechanism of the Skills partnerships
- The 2030 target is linked to the final commitments agreed under the Pact for Skills and its measurement could be decided by the follow-up and local monitoring mechanism of the Skills partnerships

Advised Actions	Costs/Conditions
European Commission	
<ul style="list-style-type: none"> • To coordinate and facilitate the establishment of skills partnerships and tourism education programmes • To establish a European Platform for Tourism that supports access to learning resources and best practices on training • To promote the increase of knowledge among national authorities with regards to on sustainability and digitalisation in tourism and resilient destination governance 	<ul style="list-style-type: none"> • Meetings and networking events to facilitate partnerships (€50.000 per annum) • Resources to establish a platform which supports finding and accessing training approaches for tourism (€250.000 once; staff time of junior staff member to maintain per annum) • Support developing university-level European tourism education programmes through Erasmus+

¹⁶⁹ <https://keep.eu/projects/10905/Regional-Certification-of-P-EN/>

¹⁷⁰ <https://nexttourismgeneration.eu/>

	capacity building actions ¹⁷¹ (€15.000.000 per annum)
Member States/Regions/Local Authorities	
<ul style="list-style-type: none"> • To coordinate or take initiative to survey skills and tourism profession needs among tourism enterprises and workers, and insert new skills and occupational profiles in tourism education and training offer • To develop training programmes on hospitality and tourism for the unemployed, increase of blended learning concepts and apprenticeships • To set-up of regional and/or national Skills Partnerships, with the participation of all stakeholders (industry, social partners, training providers, destinations, governments) that take into account workers' skills needs 	<ul style="list-style-type: none"> • Resources of Tourism/ Employment/ Education Ministry to survey workforce needs in the tourism industry and create skills programmes for workers and unemployed to meet necessary skills profiles (€25.000 once) • Resources for collaboration between educational, social and tourism actors to meet skills demands in tourism (€25.000 - €500.000 per annum dependent on needs and country) • Resources for local employment offices to link jobs and skills needs by proposing traineeships and training courses (one part-time staff member)
Destinations marketing and management organisations (national, regional and local)	
<ul style="list-style-type: none"> • To allow tourism workers to identify key training needs among destination stakeholders in the local tourism ecosystem • To develop locally adapted training offer on tourism in collaboration with national/regional partnerships • To actively encourage unemployed tourism workers to participate in training on hospitality and tourism • Upskilling of DMMO staff to increase the ability to support other stakeholders in the destination, including SMEs 	<ul style="list-style-type: none"> • Resources or staff time from DMMOs to survey and discuss skills needs in the enterprises in the destination (€5.000 once for survey; part-time staff member per annum)
Industry	
<ul style="list-style-type: none"> • To recognise the new skill needs on green and digital transition and changing customer demand and ensuring necessary skills availability in the company, even if small • To actively engage with workers to implement up/reskilling programmes for at least 10% of the tourism workforce (including small business owners) each year starting in 2022 until 2030. 	<ul style="list-style-type: none"> • Resources to allow personnel participation in training at all levels (managerial, waiting and kitchen staff) for courses paid by employers or free training offer if available (staff time and 0 - €2000 per annum per employee) • HR resources/effort to follow skills needs and support training of workforce (existing staff time – HR cycle)

¹⁷¹ <https://erasmus-plus.ec.europa.eu/opportunities/organisations/cooperation-among-organisations-and-institutions/capacity-building-higher-education>

Appendix. Record of support for actions through the consultation process.

Key action area	Support from online survey	Support from workshops
Enabling policy framework and governance		
Smart and sustainable tourism strategies	<p>32 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>9 Business organisations/ companies/ associations</p> <p>5 national/ regional/ local administrations</p> <p>9 universities/ research organisations</p> <p>2 DMOs</p> <p>7 international organisations/ networks of organisations/NGOs</p> <p>2 other</p> <p>Support for: All tourism strategies on national, regional and destination levels should be driven by sustainability principles and data, coordinated with ecosystem based spatial planning and green infrastructure development. The EU and national governments should show leadership for regional and destination level authorities and destination management organisations.</p>	<p>Discussed in Sustainability Knowledge (first workshop) and Green transition (second workshop). Workshop discussions suggested specific action proposals to develop and update tourism strategies with clear monitoring mechanisms that fully reflect the principles of sustainability.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.9 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Sustainability data collection framework	<p>29 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>7 Business organisations/ companies/ associations</p> <p>10 national/ regional/ local administrations</p> <p>5 universities/ research organisations</p> <p>2 DMOs</p> <p>3 international organisations/ networks of organisations/NGOs</p> <p>2 trade union</p> <p>Support for: A common framework of sustainable tourism data collection and indicators that is used to inform policy decisions. Education to implement the actions necessary to meet sustainability standards.</p>	<p>Discussed in Sustainability Knowledge (first workshop) and Green transition (second workshop). Workshop discussions brought up action proposals to introduce a common indicator framework that produces a complete picture of sustainable tourism across different system levels - European, National, Regional and Destination and leads to policy and sustainability change.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.9 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as A (From A to D).</p>

Fair policy frameworks for short-term rental platforms	<p>8 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>6 Business organisations/ companies/ associations</p> <p>1 national/ regional/ local administrations</p> <p>1 trade union</p> <p>Support for:</p> <p>The main call was to create a level playing field for stakeholders in short-term rentals. This includes a call for a definition and clarification of the collaborative economy, roles and responsibilities of providers, differentiate different providers and prepare a legislative proposal for the short-term rental sector.</p>	<p>Discussed in “Technology empowered destinations and transforming value co-creation” (first workshop) and Digital Transition (second workshop). Workshop discussions brought up action proposals to regulate the use of peer to peer platforms, with particular emphasis on short term rental, with the aim of: monitoring its impacts, maintaining the local authenticity of the areas, and ensuring fair conditions for people working for and through these platforms.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.8 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Collaborative destination governance	<p>13 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>1 Business organisations/ companies/ associations</p> <p>2 national/ regional/ local administrations</p> <p>One universities/ research organisations</p> <p>3 DMOs</p> <p>4 international organisation/ networks of organisations/NGOs</p> <p>2 others</p> <p>Support for:</p> <p>The main call was for more inclusive governance structures, collective to come to a stronger collective understanding of the desired future of the destination and greater collaboration between (transversal) stakeholders</p>	<p>Discussed in Destination governance Workshop and Adaptive capacity workshop (first workshop) and Resilience transition (second workshop). Workshop discussions brought up action proposals to make DMMOs collaborative organisations, on a destination level, diversify products to suit local users and visitors and to facilitate knowledge sharing.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.33 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Green transition		
Reducing passenger transport GhG emissions	<p>39 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>14 Business organisations/ companies/ associations</p>	<p>Discussed in Carbon neutral mobility (first workshop) and Green transition (second workshop). Workshop discussions brought up action proposals to provide more guidance on the roll out of the Fit for 55 package, to</p>

	<p>3 national/ regional/ local administrations 9 universities/ research organisations 3 DMOs 7 international organisations/ networks of organisations/NGOs 2 trade union 2 other</p> <p>Support for: Reduce GhG for the entire tourism industry, particularly transport, both to the destination, multimodal travel and last-mile initiatives. Development of new technologies and infrastructure, requiring investment. Demarketing to long haul consumers, and consumer behaviour change strategies, to reduce the airmiles travelled. Use of market-based instruments to incentivise the transition to cleaner technologies and fuels. Rural areas, islands and peripheral regions need to improve their connectivity and will have greater difficulties to decarbonise.</p>	<p>invest in technological advancements aimed at reducing tourism transport emissions, and to put more attention on the average GhG emissions per guest/night so as to develop marketing strategies to reduce them.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.6 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as A (From A to D).</p>
Reducing and recycling plastics	<p>14 responses in the online consultation referred to issues covered under this action area, distributed as: 2 Business organisations/ companies/ associations 3 national/ regional/ local administrations 3 universities/ research organisations 2 DMOs 2 international organisations/ networks of organisations/NGOs 2 other</p> <p>Support for: Promotion of circular economy in tourism in general through reduction of all forms of waste. Several mentions of reduction of non-recyclable but also recyclable forms of plastic, and introduction of compostable materials for disposable items.</p>	<p>Discussed in Circular tourism (first workshop) and Green transition (second workshop). Workshop discussions brought up action proposals focusing on eliminating the use of unnecessary plastic and increase collection and recycling rates, such as development of market-based instruments to ensure that circularity of plastic is integrated in the tourism industry.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 4.3 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as A (From A to D).</p>
Minimising food waste	<p>15 responses in the online consultation referred to issues covered under this action area, distributed as: 3 Business organisations/ companies/ associations</p>	<p>Discussed in Circular tourism (first workshop) and Green transition (second workshop). Workshop discussions brought up action proposals to mainstream the implementation of the food circularity</p>

	<p>3 national/ regional/ local administrations 3 universities/ research organisations 2 DMOs 2 international organisations/ networks of organisations/NGOs 2 other</p> <p>Support for: Food waste reduction as a financial saving and resource saving for the hospitality sector. Food waste reduction as corporate responsibility with high PR risks. GhG reduction benefits from reduction in food waste (e.g. from transport of perishable goods). Promotion of local value chains in food.</p>	<p>principles, to develop a clear methodology for food waste measurement in the hospitality industry, and to improve food waste regulatory framework where appropriate, such as to make separation compulsory in the hospitality sector.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.5 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as A (From A to D).</p>
Improving the energy efficiency of buildings	<p>7 responses in the online consultation referred to issues covered under this action area, distributed as: 2 Business organisations/ companies/ associations 2 universities/ research organisations 3 international organisations/ networks of organisations/NGOs</p> <p>Support for: Sustainable design, construction and management of buildings and infrastructures. Standards required for retrofitting and for new buildings. Training required for construction contractors and for hotel designers. Inclusion of embodied energy in the GhG responsibilities of the building owner, the management unit and the franchise with customer-facing responsibilities.</p>	<p>Discussed briefly in Circular tourism (first workshop) and more in depth in Green transition (second workshop). Workshop discussions brought up action proposals to strengthen the role of tourism in all various national and regional energy and climate plans, and improve access to initiatives such as the European Bauhaus in increasing efficiency of newly designed tourism spaces.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 2.8 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Measuring and reporting environmental footprint	<p>34 responses in the online consultation referred to issues covered under this action area, distributed as: 15 Business organisations/ companies/ associations 3 national/ regional/ local administrations 7 universities/ research organisations 2 DMOs 5 international organisations/ networks of organisations/NGOs 2 trade union</p>	<p>Discussed in Sustainable Consumption (first workshop) and Green transition (second workshop). Workshop discussions brought up action proposals to innovate the existing methodologies in the measurement of the environmental footprint of tourism, to facilitate the use of green procurement practices (such as though EU, national or third party recognised labels) amongst the various stakeholders of the tourism industry.</p>

	<p>Support for: The design of cost-effective and practical systems to measure and report the environmental footprint of tourism businesses, considering the needs of small tourism firms, and the market relevance of such measurements to inform consumer decisions.</p>	<p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.9 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as A (From A to D).</p>
Digital transition		
European tourism data space	<p>65 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <ul style="list-style-type: none"> 18 Business organisations/ companies/ associations 21 national/ regional/ local administrations 5 universities/ research organisations 2 DMOs 16 international organisations/ networks of organisations/NGOs 1 trade union 2 other / EU institution <p>Support for: The main call was to work with data, collect tourism data, develop a shared language for data, create open data and open data projects, ensure data access, ensure balance between data sharing and protection, create a shared data space for Europe.</p>	<p>Discussed in “Data analytics and real-time experience management” (first workshop) and Digital Transition (second workshop). Workshop discussions brought up action proposals to develop a data sharing strategy and systems, to develop a data interoperability framework for tourism and a Code of Conduct for digital data access and sharing by tourism SMEs.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 2.9 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Digital information of tourism offer for informed decision making	<p>9 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <ul style="list-style-type: none"> 1 Business organisations/ companies/ associations 4 national/ regional/ local administrations 2 universities/ research organisations 1 DMOs 1 trade union <p>Support for: The main call was to use digital technologies to present information online. Create a destination market place to offer products, use digital labels, increase presence to have a visibility of digital offers and engagement pre-</p>	<p>Discussed in “Digital never-ending tourism and virtual experiences” (first workshop) and Digital Transition (second workshop). Workshop discussions brought up action proposals to develop a shared ontology for tourism offers and to support the digitalisation of all customer touchpoints with the aim to provide transparent information of tourism services.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.3 out of 5.</p> <p>Voting results indicated that respondents considered the target for</p>

	during-post travel, easily accessible and findable across the EU countries.	2023/2025/2030 feasible as B (From A to D).
Virtual technologies for tourism services	<p>11 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>3 Business organisations/ companies/ associations</p> <p>4 national/ regional/ local administrations</p> <p>3 universities/ research organisations</p> <p>Support for:</p> <p>The main call was to expand digital technologies, content and offers to create virtual reality, mixed reality. Virtual tourism offers to extend towards never-ending tourism activity and digital tourism offices with physical and virtual spaces to visit.</p>	<p>Discussed in “Digital never-ending tourism and virtual experiences” (first workshop) and Digital Transition (second workshop). Workshop discussions brought up action proposals to digitalise and create virtual offers for tourism services and experiences, with particular emphasis on cultural and natural assets and in rural, insular and peripheral areas.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 2.9 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as C (From A to D).</p>
Real-time management and provision of personalised tourism	<p>3 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>2 Business organisations/ companies/ associations</p> <p>1 national/ regional/ local administrations</p> <p>Support for:</p> <p>The main call was to develop real-time capacity management tools, use of cross-cutting data (visitors, residents etc.) and use data for experience management in real-time, (e.g. tourism visitor and traffic flows). Call for real-time tourism strategic planning.</p>	<p>Discussed in “Data analytics and real-time experience management” (first workshop) and Digital Transition (second workshop). Workshop discussions brought up action proposals to create open data sets and real-time data flows amongst public actors, to encourage data-based innovations in tourism by developing real-time data innovation pilots and to support public-private co-operation initiatives in the sharing of successful data-driven tools.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.45 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Digital capacities of destinations and tourism SMEs	<p>40 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>17 Business organisations/ companies/ associations</p>	<p>Discussed in “Digital empowered and knowledge of tourism providers and consumers” (first workshop) and Digital Transition (second workshop). Workshop discussions brought up</p>

	<p>7 national/ regional/ local administrations</p> <p>1 universities/ research organisations</p> <p>2 DMOs</p> <p>11 international organisations/ networks of organisations/NGOs</p> <p>1 trade union</p> <p>1 other / citizens</p> <p>Support for:</p> <p>The main call was for digital upskilling and reskilling and skills for data and skills for SMEs. Digital skill call to close the digitalisation gap amongst geographical areas and business size typology by creating an infrastructure of support for all tourism stakeholders.</p>	<p>action proposals to support the development of Digital Innovation Hubs across MS and regions to provide support on digitalisation for SMEs, the tourism workforce and tourists; and to develop the technology infrastructure to close the gap of connectivity between urban and rural/remote destinations.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 2.9 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Equality and accessibility in tourism		
Tourism services and facilities accessible to all	<p>28 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>12 Business organisations/ companies/ associations</p> <p>4 national/ regional/ local administrations</p> <p>1 universities/ research organisations</p> <p>3 DMOs</p> <p>4 international organisations/ networks of organisations/NGOs</p> <p>1 trade union</p> <p>3 other</p> <p>Support for:</p> <p>Support ranged from increasing general accessibility to increase visitor numbers, to a focus on creating greater accessibility for all, including persons with a disability or other specific groups (e.g. elderly, low income).</p>	<p>Discussed in Supporting equity, accessibility and social impacts (first workshop) and Resilience transition (second workshop). Workshop discussions brought up action proposals to pursue implementing the European Disability card, to develop a monitoring system to collect data on accessibility and to communicate the importance of accessibility and inclusive marketing, also among SMEs</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.2 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as C (From A to D).</p>
Equality and good quality of tourism jobs	<p>14 responses in the online consultation referred to issues covered under this action area, distributed as:</p> <p>One Business organisations/ companies/ associations</p> <p>4 national/ regional/ local administrations</p> <p>1 universities/ research organisations</p>	<p>Discussed in Supporting equity, accessibility and social impacts workshop and Improving skills and Quality of Work workshop (first workshops) and Resilience transition (second workshop). Workshop discussions brought up action proposals were too support SMEs on a destination level increase equality and</p>

	<p>2 international organisations/ networks of organisations/NGOs 4 trade union 2 other</p> <p>Support for: Equality was viewed mainly in the light of equal opportunities for work in the tourism ecosystem. Rather than quality of jobs, the term working conditions was mostly used.</p>	<p>quality of jobs, to engage with the tourism workforce, and to develop strategies to attract and keep talents within the tourism ecosystem.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 3.2 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as B (From A to D).</p>
Education and training for people and organisations		
Training and upskilling of the workforce	<p>51 responses in the online consultation referred to issues covered under this action area, distributed as: 23 Business organisations/ companies/ associations 11 national/ regional/ local administrations 3 universities/ research organisations 6 international organisations/ networks of organisations/NGOs 3 trade union 5 other</p> <p>Support for: Overall very wide support for further training in general. Upskilling and training were often also mentioned in the context of SMEs and the need for learning digital skills.</p>	<p>Discussed in Improving skills and ensuring quality of work workshop (first workshops) and Resilience transition and digital transition (second workshop). Workshop discussions brought up action proposals were to increase digital knowledge also among SMEs, work with Pact for Skills and set up additional Skills partnerships, and to establish a platform for lifelong learning.</p> <p>Mean score of respondents planning to work on the key action area between 2022 and 2025 is 2.8 out of 5.</p> <p>Voting results indicated that respondents considered the target for 2023/2025/2030 feasible as A (From A to D).</p>