

Webinar “Changing demand in European tourism influence and opportunity”

12 December 2024, 15.00 – 16.30 CET

Webinar Summary





Transition pathway for EU tourism

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Introduction

Scope and objectives of the webinar



Target audience

- T4T experts
- DMOs, Industry associations and businesses in the tourism sector, with a focus on SMEs, academia, public authorities, cultural and heritage organisations, and other stakeholders interested in the topic.

Scope and objectives

Europe wants to remain a competitive destination, maximising the benefit from tourism, minimising adverse impacts, and supporting the socio-economic development we need. The main preconditions for success are that the tourism ecosystem becomes more digitally aware and proficient and reduces adverse environmental impacts. In addition, the sector needs to become more resilient, which in turn entails an enabling framework from governance to good practice sharing.

The webinar aimed to facilitate discussion among tourism stakeholders related to changes in tourism demand and the twin transition from the supply side. It brought together destination management organisations and the private sector to discuss how the industry can take the lead in the narrative around tourism and positively influence tourism demand.

It sought to discuss the following:

- An overview of the current demand (B2C and B2B, intra-European and long-haul)
- What drives current demand and how can be influenced to deliver better tourism and community benefits (from the perspectives of policy makers, the private sector, destinations, associations/networks, academia and others)
- How destinations and SMEs can maximise their opportunities to benefit from changes in demand and the mechanisms supporting the twin transition

Agenda

Welcome and introduction

15:00 – 15:10

- **Moderator:** Tim Fairhurst, Director General, European Tourism Association AISBL (ETOA)
 - Opening remarks from Elfa Kere, Policy Officer, DG GROW, European Commission
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Roundtable discussion: “Tourism demand outlook and best practices for long-haul and intra-European markets”

15.10 – 16.10

- Lyublena Dimova, Senior Research Manager at the European Travel Commission
 - Ulf Sonntag, Managing Director at NIT - Institute for Tourism Research in Northern Europe, Kiel, Germany
 - Hege Vibeke Barnes, Managing Director, at Innovation Norway USA
 - Sònia Serracarbassa González, Director at Catalunya Convention Bureau
 - Cristina Nuñez Cuesta, Strategy Director at NECSTouR, the Network of European Regions for Sustainable and Competitive Tourism
 - Robyn Stencil, Program Manager at Tours | Rick Steves' Europe
 - Kim Butigan, Marketing & Project Manager at Adriatic DMC
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16:10 – 16:20

Q&A Session

Closing remarks and next steps

16:20 – 16:30

- Wrap up by the moderator, Tim Fairhurst
 - Next steps by the Skills/ Resilience T4T Expert Subgroup Chair, Vangelis Panagiotis
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Transition pathway for EU tourism

Moderates:



Tim Fairhurst
Director General
ETOA



Elfa Kere,
Policy Officer, DG
GROW, European
Commission



Lyublena Dimova
Senior Research
Manager
ETC



Ulf Sonntag
Managing Director at
NIT



Hege Vibeke Barnes
Managing Director
Innovation Norway USA



**Sònia
Serracarbassa
González**
Director at Catalunya
Convention Bureau



**Cristina Nuñez
Cuesta**
Strategy Director at
NECSTouR



Robyn Stencil
Program Manager at
Tours | Rick Steves'
Europe



Kim Butigan
Marketing & Project
Manager at Adriatic
DMC



**Vangelis
Panayotis,** Chair of
the T4T Skills/
Resilience subgroup

Speakers

Webinar in numbers



232 Registrations



102 Participants

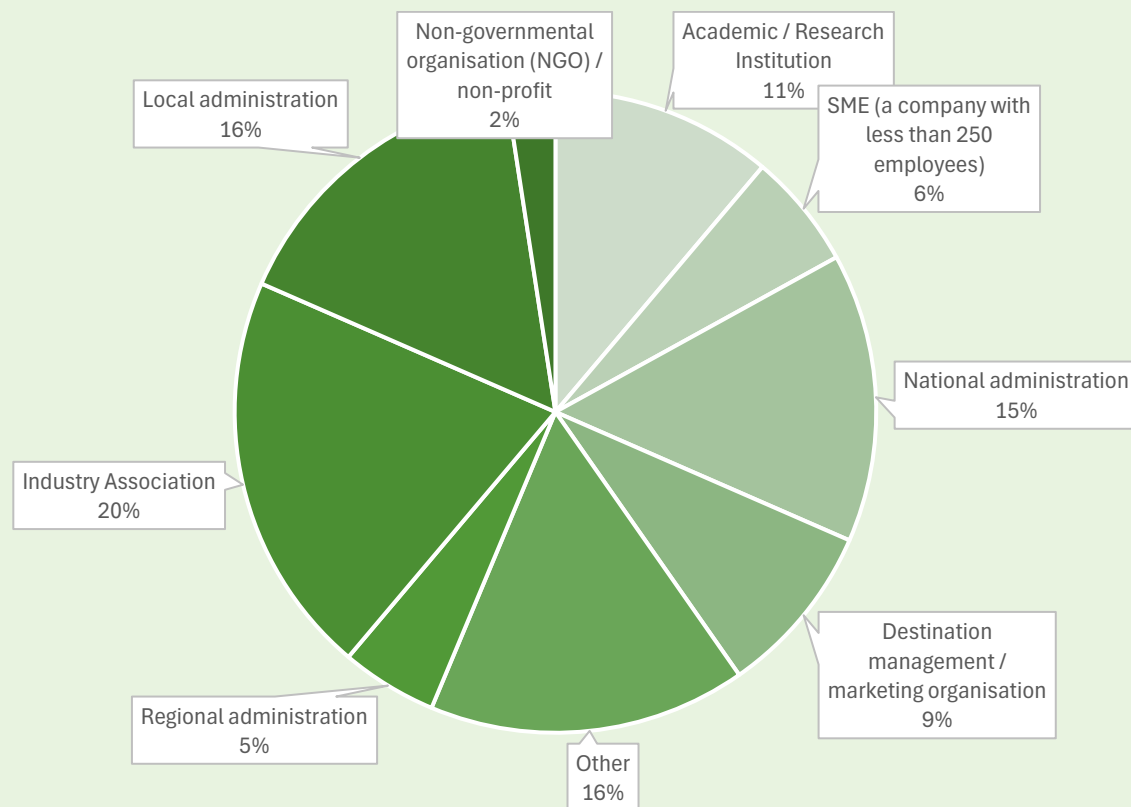


Participants from **23 EU MS** and **4 non-EU** countries



9 Speakers

Participants' Organisations



Results of the post-webinar survey



All respondents were very satisfied/satisfied with the webinar.



All respondents found that the webinar provided useful information.



All respondents feel that they have obtained a better understanding and knowledge of the topic after attending.

Key discussion points (1/2)

Representatives from the **European Commission, European Travel Commission, Institute for Tourism Research in Northern Europe, Innovation Norway USA, NECSTouR, Catalunya Convention Bureau, Tours | Rick Steves' Europe and Adriatic DMC** discussed the following:

1

Roundtable discussion: Tourism demand outlook and best practices for long-haul and intra-European markets

- Lyublena Dimova from the European Travel Commission highlighted the **recovery of European tourism post-COVID**, noting that foreign visits and overnight stays have surpassed 2019 levels. The uneven distribution of recovery across regions was emphasized, with some destinations still lagging. The impact of external factors such as travel costs, geopolitical uncertainties, and climate change on travel behavior was discussed. The importance of monitoring traveler behavior and adapting to changes, particularly in response to inflation and climate change, to ensure sustainable tourism growth was stressed. It was noted that more than 50% of destinations have recovered from COVID, with some reporting double-digit growth. Additionally, 34% of all tourism nights in the EU occurred in just July and August 2022.
- Ulf Sonntag from the Institute for Tourism Research in Northern Europe **presented insights into the German travel market**, revealing that despite economic challenges, travel demand remains strong. It was noted that Germans prioritize travel similarly to essential needs and are willing to adjust their budgets to maintain travel plans. A significant attitude-behavior gap in sustainable travel was highlighted, with many expressing a preference for eco-friendly options but few making it a decisive factor. The need for the tourism sector to invest in sustainability to ensure long-term viability was emphasized. Additionally, the Mediterranean region has seen a significant increase in market share, rising from 33% pre-COVID to 43% now. Despite high prices, Germans continue to favor Mediterranean destinations over domestic options.
- Hege Vibeke Barnes from Innovation Norway USA discussed **Norway's tourism strategy**, focusing on sustainability and the appeal of cooler climates. Significant growth in tourism from the US and Germany, particularly in off-peak months, was reported. Norway's achievements in electric transportation and sustainable destination development, including the certification of over 60 destinations, were highlighted. The importance of public-private partnerships and the need to balance tourism growth with environmental and community well-being were emphasized. Norway is noted as the first country in the world to have more electric vehicles on the road than petrol-powered cars. The success of Norway's hybrid electric cruise ships in promoting sustainable maritime tourism was also highlighted.
- Cristina Nuñez Cuesta from NECSTouR emphasized **the importance of public-private collaboration in tourism**. The need to shift from volume-based to value-based tourism, focusing on sustainability and community benefits, was discussed. Successful regional initiatives in Europe that promote responsible tourism and engage local communities were highlighted. The importance of market intelligence and leadership in developing tourism strategies that align with sustainable and competitive goals was emphasized. The partnership between Visit Scotland and Tourism Cares to promote responsible tourism experiences was mentioned. Additionally, Madrid's regional tourism tables, which connect over 100 municipalities to attract demand outside the city, were highlighted.

Key discussion points (2/2)

Representatives from the **European Commission, European Travel Commission, Institute for Tourism Research in Northern Europe, Innovation Norway USA, NECSTouR, Catalunya Convention Bureau, Tours | Rick Steves' Europe and Adriatic DMC** discussed the following:

1

Roundtable discussion: Tourism demand outlook and best practices for long-haul and intra-European markets

- Sònia Serracarbassa González from the Catalunya Convention Bureau presented **a new business event strategy** aimed at complementing traditional tourism. Efforts to distribute business events across Catalonia, reducing seasonality and promoting regional diversity, were discussed. The importance of cross-industry collaboration and innovation in creating value-added proposals for business events was emphasized. Initiatives in the sports and mobility sectors were highlighted as examples of how business events can drive economic growth and sustainability. Catalonia's focus on key economic sectors such as sports and mobility to attract specific business events was noted. Additionally, the COSME project, which aims to design the future of business events to be more competitive and sustainable, was mentioned.
- Robyn Stencil from Rick Steves' Europe shared insights **on creating meaningful travel experiences that connect travelers with local cultures**. The importance of unique, hands-on experiences, such as visiting local homes for cooking classes or exploring family-owned wineries, was highlighted. These personalized experiences leave lasting impressions and drive demand for destinations. Destinations were encouraged to leverage their unique cultural assets to attract and engage travelers. Examples such as the Third Man Museum in Vienna and cooking classes in local homes in Poland were shared. The importance of diversifying products to spread tourism throughout the year and across different activities was stressed.
- Kim Butigan from Adriatic DMC discussed **the role of gastronomy in tourism**. The growing demand for authentic food experiences and the importance of sustainability in food production were highlighted. Examples of successful gastronomic tours, such as oyster tasting in Mali Ston and traditional olive oil production demonstrations, were shared. The need to protect and promote traditional food practices and engage young people in preserving cultural heritage was emphasized. The importance of effective marketing to showcase these unique experiences to potential travelers was stressed. It was mentioned that over half of their shore excursions include a food and drink element, with 54 exclusively focused on Croatian gastronomy. Additionally, the importance of short-form videos in capturing travelers' attention and promoting these experiences was highlighted.

Conclusions and next steps

Conclusions

1	European tourism recovery must focus on sustainability, balancing regional disparities and adapting to climate change and inflation.	
2	Effective partnerships between public and private sectors are essential for innovative and sustainable tourism strategies.	
3	Shifting from volume to value-based tourism is crucial, promoting responsible tourism that benefits local communities.	
4	There is a gap between consumers' sustainable travel preferences and their actual behaviour; the sector must make sustainable options more attractive.	
5	Diversifying tourism offerings and embracing innovation can address seasonality and regional imbalances	
6	Gastronomy enhances travel experiences and supports local economies, promoting authentic and sustainable food practices.	

Next steps

1	Strengthen partnerships between public and private sectors to share best practices and develop innovative, sustainable tourism strategies across Europe.
2	All stakeholders in the tourism sector should connect to the EU Tourism Platform to access resources, participate in discussions, and stay updated on EU tourism policies, fostering a collaborative environment and ensuring stakeholders are informed and supported in their twin transition and resilience efforts.

Thank you!

The document has been prepared for the European Commission in the context of the project “Transition Pathway Stakeholder Support Platform: Implementation for Tourism Ecosystem” (the Project) in accordance with the signed contract No EISMEA/2022/OP/0018. This report reflects the views and results of the workshop discussion between the tourism stakeholders and do not necessarily represent the views of the European Commission. The action recommendations, however, do not necessarily represent the position or endorsement of all stakeholder groups nor the position of individual Member States or the European Commission.