EUROPEAN
COMMISSION

Brussels, 4.11.2026
SWD(2026) 777 final

COMMISSION STAFF WORKING DOCUMENT

Tourism - A Key Asset for Europe
Towards an EU Sustainable Tourism Strategy

Accompanying the document

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

EU Sustainable Tourism Strategy

{COM(2026) 777 final}

Contents

Introduction **3**
Chapter 1. Tourism in the EU – nature, weight and impact **4**
1.1 The tourism ecosystem 4
1.1.1 Tourism – a formal classification 5
1.1.2 Tourism diversity – illustrative typologies 6
1.2 Measuring tourism flows and impact 16
1.2.1 Data sources and approaches 16
1.2.2 Economic weight 18
1.2.3 Tourism demand, distribution and seasonality 21
1.2.4 Employment 24
1.3 Trends and challenges shaping European tourism 25
Chapter 2. The path to the Strategy **29**
2.1 The evolving EU policy context 29
2.2 Summary of consultations and other public collaborative input 31
2.2.1 Open and targeted public consultations 31
2.2.2 Targeted stakeholder dialogues 34
2.2.3 Youth Dialogues 36
2.2.4 Public debates and other targeted expert input into the Strategy 38
2.3 EU institutional policy positions and evidence 44
2.3.1 EU institutional policy positions and recommendations 45
Chapter 3. The pillars of the Strategy **48**
3.1 A competitive tourism sector 48
3.1.1 Skills and quality jobs in tourism 48
3.1.2 A data-driven sector 54
3.1.3 Simplification of the tourism operational environment 62
3.1.4 Funding 66
3.2 A sustainable, accessible and resilient ecosystem 75
3.2.1 EU Model for Tourism Management 75
3.2.2 Balanced, accessible and inclusive tourism 78
3.2.3 Environmental transition and regenerative tourism 87
3.2.4 Crisis preparedness and resilience 95
3.3 Sustainable connectivity 102

3.3.1 Planning and booking a journey 103
3.3.2 Ensuring a sustainable, seamless and accessible travel experience across Europe..... 105
3.3.3 The passenger experience and passenger rights 115
3.4 Global outreach and branding..... 117
3.4.1 Strengthening the international dimension of EU tourism policy 117
3.4.2 International cooperation on tourism skills..... 121
3.4.3 Strengthening international connectivity..... 122
3.4.4 Facilitating travel to Europe through modern border and visa management..... 123
3.4.5 Destination Europe 124
Chapter 4. Governance and review 127
4.1 EU Tourism Alliance 127
4.2 EU Tourism Platform..... 128
4.3 Review and reporting 129

Introduction

This Staff Working Document accompanies the Communication on a European Union (EU) Sustainable Tourism Strategy[1]. It provides the analytical basis for the Strategy, including the evidence base, consultation findings and implementation considerations for the proposed actions. The document is organised around the main policy areas addressed by the Strategy, with a particular focus on the consultation results underpinning each policy area.

The document gives an overview of the remarkable variety of European tourism and its considerable economic, social and territorial impact. Tourism is, by its nature, largely place-based and locally or regionally managed. At the same time, tourism flows regularly cross regional or national borders, with visitors travelling and businesses operating across destinations. Many of the challenges affecting tourism, including climate change, technological developments, international competition and transport connectivity, extend beyond individual destinations and national borders, requiring coordinated responses across different policy areas and levels of governance. These characteristics of tourism are reflected in the European Union's legal and policy framework: Article 195 of the Treaty on the Functioning of the European Union (TFEU) provides that the Union complements Member State action, promoting the competitiveness of businesses and fostering cooperation between Member States, in particular through the exchange of good practices.

EU tourism policy has been evolving over the years. The 2022 Transition Pathway for Tourism[2] set a collaborative framework to help the sector recover from the COVID-19 pandemic, address the green and digital transitions, and build long-term resilience. Based on the Transition Pathway for Tourism, the Council of the European Union subsequently adopted the European Tourism Agenda 2030[3], addressing economic, environmental, cultural, and social sustainability in line with the United Nations 2030 Agenda for Sustainable Development.

During 2024-2029 the European Commission is going a step further in recognising tourism as a major EU industry and raising its visibility, by announcing a new EU Sustainable Tourism Strategy and by integrating transport and tourism within a single Commissioner portfolio, with the mandate to intensify the Union's efforts to promote a resilient and competitive tourism sector[4].

Against this backdrop, calls have emerged for a stronger and better coordinated EU-level policy response to support the sector's development and resilience, particularly in the face of natural and human-made disasters and geopolitical shocks, complementing actions by Member States, regional and local authorities.

[1] European Commission, EU Sustainable Tourism Strategy, COM°(2026)°777 final, November 2026.
[2] European Commission, 'Tourism Transition Pathway', accessed November 2026.
[3] Council of the European Union, Council conclusions on 'European Agenda for Tourism 2030', document 15441/22, December 2022.
[4] Ursula von der Leyen, Mission letter to Apostolos Tzitzikostas, Commissioner for Sustainable Transport and Tourism, European Commission, December 2024.

This document first sets out an overview of the European tourism ecosystem and its considerable diversity (Chapter 1). It then presents the extensive consultation activities and policy contexts underpinning the Strategy (Chapter 2). Detailed context for the actions proposed by the Strategy is given in Chapters 3 and 4.

Chapter 1. Tourism in the EU – nature, weight and impact

Tourism is one of the EU's largest economic sectors, with a considerable business, economic and employment footprint across the Union. It has a strong cultural and territorial dimension, rooted in Europe's diverse landscapes, heritage and traditions. Tourism is also inherently international, connecting the rest of the world to Europe, and has consistently been an innovator and early adopter of new technologies. Tourism is far from a monolithic sector. It is characterised by a multitude of interconnected subsectors and activities, from cultural, rural and coastal tourism to sport, health and social tourism, serving a large variety of visitor profiles and age groups.

Understanding the diversity of the tourism ecosystem is essential for designing effective public policy. The following sections therefore first describe the structure of the ecosystem before examining the major trends and challenges that shape its future development.

1.1 The tourism ecosystem

Tourism is commonly understood as *"a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or professional purposes"*[5]. While this definition appears straightforward, tourism does not constitute a single economic sector. Rather, it is a complex ecosystem bringing together a wide range of interconnected activities that collectively shape the visitor experience.

As recognised by the European Parliament in its Resolution of April 2026[6], *"the tourism ecosystem covers many industries, including transport, travel agencies and tour operators, support services, accommodation and catering, creative arts and entertainment, and sports and amusement activities."* It also includes a remarkable variety of tourism experiences, ranging from cultural, nature-based (e.g. eco-tourism) and gastronomic tourism to business, wellness, sport, cruise and many other specialised forms of tourism. Tourism also takes place across a wide variety of destinations, including urban, rural, coastal, island, mountain and outermost regions, each with distinct characteristics, opportunities and challenges. These different forms of tourism can also be seen through the lens of the individuals who travel and are shaped by their needs and expectations: families, young people, seniors, business travellers, persons with special needs, group tours and other visitors with specific access or support needs.

Transport is fundamental to this ecosystem, acting as both the primary enabler of visitor mobility and a significant component of the overall travel experience. Connectivity across air,

[5] UN Tourism, 'Glossary of Tourism Terms', accessed November 2026.
[6] European Parliament, Resolution of 28 April 2026 on enhancing connectivity, preserving cultural heritage, and driving local excellence in European tourism: destination management and regional tourism growth (2025/2120(INI)).

rail, road and maritime networks directly shapes visitor flows, accessibility, and the environmental footprint of European tourism.

This diversity is one of European tourism's greatest strengths, but it also makes the ecosystem particularly dependent on developments beyond the tourism sector itself. Tourism is structured by its local societal, environmental and economic context, as well as by broader trends such as climate change, demographic change, technological and geopolitical developments. At the same time, it is influenced by policies across multiple sectors, including education and employment, finance, environment, consumer protection, transport, and home affairs, while tourism considerations are not always systematically reflected across these policy areas.

Tourism's diversity also means that the ecosystem is constantly evolving, adapting and innovating. No single typology or classification can fully capture the breadth of tourism activities and experiences. Accordingly, this Staff Working Document does not seek to provide an exhaustive catalogue of tourism typologies. Rather, the following sections aim to illustrate the weight, variety and complexity of the tourism ecosystem. The absence of any particular tourism activity or form from this document should not be interpreted as a judgement on its importance or policy relevance.

1.1.1 Tourism – a formal classification

Tourism can be described from different perspectives depending on whether the objective is statistical measurement, economic analysis or policy development. For statistical purposes, the Statistical Office of the European Union (Eurostat) defines tourism *as "the activity of visitors taking a trip to a main destination outside their usual environment, for less than a year, for any main purpose, including business, leisure or other personal purpose, other than to be employed by a resident entity in the place visited."*[7] This definition is in line with the International Recommendations for Tourism Statistics 2008[8].

From an economic perspective, however, tourism does not constitute a single economic sector or category. Rather, it spans a range of interconnected economic activities, including accommodation, food and beverage services, passenger transport, travel agencies and tour operators, cultural activities, sport and recreation[9]. This cross-sectoral structure explains why tourism is often described as an ecosystem and why measuring its economic contribution requires combining data from multiple sectors, including through Tourism Satellite Accounts (TSAs)[10]. For the purposes of the Strategy, the term 'tourism ecosystem' refers to this broader set of interconnected activities, while 'tourism sector' is used more specifically when referring to tourism businesses and industry.

[7] European Parliament and Council of the European Union, Regulation (EU) No 692/2011 of the European Parliament and of the Council of 6 July 2011 concerning European statistics on tourism and repealing Council Directive 95/57/EC, Official Journal of the European Union, July 2011.
[8] United Nations, International Recommendations for Tourism Statistics 2008, January 2010.
[9] Eurostat, Statistics Explained 'Tourism Statistics'; European Commission, Joint Research Centre; Directorate-General for Mobility and Transport, 'Background and methodology', EU Tourism Dashboard, both accessed November 2026.
[10] Eurostat, Tourism Satellite Accounts in Europe – 2026 edition, March 2026.

Within this statistical framework, tourism can be classified along several dimensions:

- **Scope**: a visitor is classified as a tourist (overnight visitor) if the trip includes at least one overnight stay, or as a same-day visitor (excursionist) otherwise.
- **Purpose**: personal or professional/business travel. Personal travel includes holidays, leisure and recreation, visits to friends and relatives, and other personal purposes.
- **Destination/origin of visitors**: domestic tourism (visits within a country by residents of that country), inbound tourism (visits to a country by non-residents) or outbound tourism (visits by residents outside their country).
- **Duration**: short trips (1-3 nights) or longer stays.
- **Socio-demographic characteristics**: such as age and gender.
- **Transport mode and accommodation type**.
- **Territory**: regional breakdowns of destinations based on the NUTS classification for territorial units[11], complemented by a "type of locality" classification based on the degree of urbanisation and whether destinations are coastal or non-coastal.

While this statistical framework provides a common basis for measuring tourism, it does not fully reflect the diversity of tourism experiences, destination types and visitor motivations. The following section therefore presents a complementary policy typology to illustrate the breadth of tourism forms addressed by the Strategy.

1.1.2 Tourism diversity – illustrative typologies

The diversity of tourism illustrates both the richness of Europe's tourism offer and the complexity of the tourism ecosystem. It also demonstrates that tourism policy cannot rely on a one-size-fits-all approach. While common principles can guide European action, their implementation must take account of the diversity of destinations, tourism activities, visitor motivations and local circumstances across the Union.

There is no single comprehensive or mutually exclusive classification of tourism forms. International and European frameworks describe tourism from different perspectives, including the characteristics of destinations, visitors' motivations, tourism activities and experiences, and visitor profiles. The typology below therefore combines these complementary perspectives. It draws, where available, on definitions and classifications developed by UN Tourism, Eurostat and the Joint Research Centre, complemented by tourism forms and market segments identified through stakeholder consultations and recent EU tourism projects.

[11] Eurostat, 'NUTS – Nomenclature of territorial units for statistics', accessed November 2026.

Table 1. Illustrative dimensions of tourism diversity[12]

DESTINATION AND TERRITORIAL CONTEXT	TOURISM TYPES AND EXPERIENCES
• Urban/city • Rural • Coastal • Maritime and inland water • Mountain • Island • Natural and protected areas (including those designated under the Natura 2000 network) • Mixed destinations	• Cultural tourism (including heritage, archaeology, arts and museums, festivals, living culture, creative tourism) • Gastronomy tourism (including food, local produce, beverage (wine and brewing heritage routes), geographical indications) • Ecotourism and nature-based tourism (including wildlife watching, birdwatching, dark-sky tourism, recreational fishing) • Adventure tourism (including hiking, trekking, climbing, cycling, diving, horseback riding et al.) • Sport tourism (including winter sports, golf, water sports including kayaking, and participation in or attendance at sporting events) • Coastal, maritime and inland water tourism (including cruise, sailing, recreational boating and nautical activities) • Health tourism (including wellness and medical tourism) • Business tourism (including meetings, incentives, conferences and exhibition (MICE)) • Education tourism • Visiting friends and relatives • Religious and pilgrimage tourism • Shopping tourism • Rural tourism (including agritourism) • Other specialised forms, e.g. industrial tourism, volunteering, community-based tourism etc.
TOURISM PRODUCTS AND TRAVEL FORMATS	**VISITOR PROFILES AND MARKET SEGMENTS**
• Cruise tourism • Camping and caravanning • Rail tourism (including heritage rail) • Road touring (including coach tourism) • Walking and cycling routes • Cultural and thematic routes • Package tours and organised travel • Premium/luxury and budget tourism products	• Young people • Families • Seniors • Solo travellers • Groups • Women travellers • LGBTQI+ travellers • Business travellers • Persons with disabilities and other travellers with accessibility needs • Digital nomads and other emerging visitor profiles

The categories above are illustrative and should not be understood as a formal, exhaustive or mutually exclusive classification. Tourism experiences commonly combine several dimensions: the same destination may accommodate different tourism types, products and

[12] United Nations, International Recommendations for Tourism Statistics 2008, January 2010; UN Tourism, UNWTO Tourism Definitions (2019), accessed November 2026; Eurostat, Tourism statistics and Territorial typologies, accessed November 2026; European Commission Joint Research Centre, A new European regional tourism typology based on hotel location patterns and geographical criteria, August 2021; European Commission, Sustainable EU Tourism – Shaping the Tourism of Tomorrow, accessed November 2026.

visitor groups, while the same tourism activity may take place across very different territorial settings.[13] Even within the same destination category, local circumstances can vary considerably: for example, mountain destinations may face challenges ranging from depopulation and limited tourism development to seasonal overcrowding and dependence on winter sports.

To illustrate the diversity further, the following sections present a small selection of tourism sub-sectors. These examples are intended solely to demonstrate the breadth and variety of the tourism ecosystem and should not be interpreted as indicating policy priorities or giving preference to particular forms of tourism.

Business travel

The meetings, incentives, conferences and exhibitions (MICE) industry is traditionally strong in Europe. Although data on the sector is fragmented, Europe is estimated to account for 26.6% of global business travel expenditure in 2025[14]. According to Eurostat, professional trips represented more than 10% of all tourism trips made by EU residents in 2025[15], but accounted for 14% of total tourism expenditure, corresponding to EUR 81.3 billion[16]. Most business trips are domestic and short, lasting no more than three nights. Despite its relatively small share of trips, business travel is a high-value segment, with accommodation accounting for the largest share of expenditure, followed by food and beverage services, and air transport. Europe's competitiveness in this field is reflected in cities such as Lisbon, Paris, Barcelona and Vienna leading the global rankings for hosting international business events in 2025[17].

Business travel can also drive greener practices across the tourism value chain. Corporate procurement standards and managed travel programmes have the scale to influence suppliers and accelerate the uptake of safer, more efficient and more sustainable practices. For example, the Global Business Travel Association's Sustainable Procurement Standards[18] provide an open-source library of sustainability criteria to support the selection and assessment of business travel suppliers.

Best practices in the sector suggest designing business events as full experiences, integrating local culture, hospitality and destination identity while creating lasting benefits for host communities. This requires close coordination between destinations, venues, policymakers, and industry stakeholders. Improving business mobility, including through more efficient visa procedures, secure digital processes and facilitated travel for trusted travellers, can further strengthen Europe's attractiveness for international business events.

---

[13] European Commission, EU Tourism Dashboard, "Socio-economic vulnerability" indicator, 2025 data, accessed November 2026.
[14] Global Business Travel Association (GBTA), Business Travel Index Outlook, August 2026.
[15] Eurostat, Expenditure by duration, purpose, main destination of the trip and expenditure category, accessed November 2026.
[16] Eurostat, 'Trips by purpose', Eurostat Data Browser, accessed November 2026.
[17] International Congress and Convention Association (ICCA), ICCA GlobeWatch 2025, accessed November 2026.
[18] GBTA Foundation, Sustainable Procurement Standards (2024), accessed November 2026.

Example: Carbon-free business events

The EU-funded project BE-FUTURE included the Net Zero Carbon Events initiative in its compilation of best practices on the business events industry[19]. Led by the Joint Meetings Industry Council, the projects brings together nearly 700 organisations from 60 countries to eliminate carbon emissions in the industry by involving the entire ecosystem, from venue operators and organisers, to exhibitors and service providers[20].

Silver tourism

Silver tourism refers to travel and tourism activities undertaken by older people, typically those aged 55, 60 or 65 and above, depending on the definition used. The population of older people (aged 65 years and over) represented 22% of the EU population on 1 January 2025, or over 99 million persons[21]. Europeans are living longer than ever before, with life expectancy at birth reaching 81.5 years in 2024[22], reflecting improvements in healthcare, living standards and social conditions. By 2050, nearly one in three EU residents will be 65 or older[23], compared to just above one in five today. Globally, about one in six people will be aged 60 years or over by 2030[24].

Population ageing presents certain economic and social challenges, from labour shortages and strained public budgets, to pressure on care, education and training systems and regional cohesion. At the same time, these shifts also bring opportunities. One example is the growing longevity economy which is unlocking new markets for products, services and innovations designed specifically for older citizens, creating new avenues for economic growth and job creation. The longevity economy can also drive innovation in healthcare, technology and financial services. These opportunities extend to tourism.

Silver tourism encompasses a wide range of tourism experiences, including wellness, medical[25] and accessible tourism, as well as cultural, nature-based, gastronomic and active tourism. An important characteristic is that many older travellers can travel outside peak holiday periods and often for longer stays, creating opportunities to reduce seasonality and support more balanced tourism flows. This can help diversify tourism demand throughout the year and improve the resilience of destinations, particularly those affected by strong seasonal fluctuations.

Indeed, population ageing is expected to fuel further growth in silver tourism. According to a study from the European Parliament, tourism expenditure by the 55+ population is projected

[19] BEFuture, Compilation of Best Practices on the Business Events Industry, September 2024.
[20] Net Zero Carbon Events, 'Net Zero Carbon Events: An Industry Initiative to Address Climate Change', accessed November 2026.
[21] Eurostat, 'Population structure and ageing', Statistics Explained, accessed November 2026.
[22] Eurostat, 'Mortality and life expectancy statistics', Statistics Explained, accessed November 2026.
[23] Eurostat, 'Population projections in the EU', Statistics Explained, accessed November 2026.
[24] United Nations, Department of Economic and Social Affairs, Population Division, World Population Prospects 2024, 'Probabilistic Projections: Population Aged 60 and Over' (2024), accessed November 2026.
[25] Simonas Gaušas et al., Research for TRAN Committee: Role of the Longevity Economy in the Tourism Sector, European Parliament, Policy Department for Transport, Employment and Social Affairs, January 2025.

to nearly double by 2040, reaching EUR 369.5 billion[26]. The study also highlights wider social benefits, including reducing isolation and fostering personal and community well-being.

Silver tourism requires destinations, transport providers and tourism businesses to improve accessibility, remove physical and digital barriers, increase safety, invest in staff training and strengthen the effective application of passenger and consumer rights. More inclusive tourism benefits not only older visitors but also persons with disabilities, families with young children and residents through improvements to transport, public spaces and services.

Rural tourism

Rural tourism can be a powerful driver of economic diversification, job creation and the maintenance of local services in rural areas. A large share of tourism already takes place in rural areas.[27] In 2025, rural areas accounted for 41.6% of beds in accommodation in the EU[28] and around 31.6% of nights spent.[29] The importance of tourism for some rural regions is considerable: even in 2021, when tourism was still affected by the COVID-19 pandemic, predominantly rural regions such as Bolzano-Bozen and Istarska županija recorded 23.8 million and 21.7 million nights respectively, while several predominantly rural regions in France exceeded 10 million nights[30]. Following the pandemic, demand for tourism in rural and less densely visited destinations increased, reflecting visitors' growing interest in nature, outdoor activities and authentic local experiences. At the same time, digitalisation, particularly the growth of online booking platforms, has improved the visibility and accessibility of rural tourism businesses, enabling them to reach wider markets.

As recognised in the European Commission's Long-term Vision for the EU's Rural Areas, its accompanying Rural Action Plan and the Rural Pact[31], rural tourism can complement other economic activities and contribute to local income, employment and entrepreneurship. It can also help distribute visitor flows more evenly throughout the year and across wider geographical areas, reducing seasonality and supporting more balanced territorial development. When developed sustainably and in close cooperation with local communities, rural tourism can strengthen cultural and gastronomic heritage, preserve traditional skills and products, retain value and support economic diversification, and improve the attractiveness and resilience of rural areas. The updated Rural Action Plan is being prepared, as committed in the Vision for Agriculture and Food. As part of the Rural Pact, a community group on rural tourism was launched, coordinated by RuralTour, the Natural Resources Institute Finland (Luke), the Committee of the Regions and UN Tourism, and a number of good practices have been published. The EU CAP Network Database[32] provides a wide range of successful projects,

[26] Simonas Gaušas et al., Research for TRAN Committee: Role of the Longevity Economy in the Tourism Sector, European Parliament, Policy Department for Transport, Employment and Social Affairs, January 2025.
[27] European Commission, 'A Long-term Vision for the EU's Rural Areas – Towards Stronger, Connected, Resilient and Prosperous Rural Areas by 2040', June 2021.
[28] Eurostat, Establishments, bedrooms and bed-places in tourist accommodation, by degree of urbanisation and coastal/non-coastal area, accessed November 2026.
[29] Eurostat, Establishments, bedrooms and bed-places in tourist accommodation, by degree of urbanisation and coastal/non-coastal area, accessed November 2026.
[30] European Commission, 'Embracing Rural Tourism: A Relevant Choice', Rural Pact Community Platform, July 2023.
[31] European Commission, 'A long-term vision for the EU's rural areas', June 2021, accessed November 2026.
[32] European Commission, 'Welcome to the EU CAP Network!', EU CAP Network, accessed November 2026.

including LEADER projects, funded by CAP interventions and focusing on tourism initiatives in rural areas.

Example: Quinta da Moscadinha, Madeira[33] – go off the main route to meet rural community

Rural tourism offers opportunities to diversify tourism beyond established hotspots, while supporting local economies, cultural heritage and community engagement. EU support, including through LEADER under the Common Agricultural Policy (CAP), helps rural businesses and communities develop tourism experiences based on local assets.

Quinta da Moscadinha, located in Madeira, offers accommodation in a traditional quinta alongside experiences that connect visitors with the surrounding rural community. These include guided walks, visits to local taverns and opportunities to discover Madeiran cider-making traditions. The project received EU support through the local LEADER action group.

Sport, active and outdoor tourism

As recognised in the 2026 Council conclusions on sport tourism as a contributor to sustainable development[34], sport tourism covers tourism activities in which travel is motivated either by participation in sport or physical activity, or by attendance at or observation of sporting events. The two are often closely linked, with major sporting events encouraging participation in sport and recreation before or after the event itself. Sport tourism has become a significant part of the global tourism economy, estimated at around EUR 585 billion or 10% of the global tourism market, with Europe accounting for around 38% of global sport tourism revenues in 2022[35]. Europe offers a particularly diverse sport tourism ecosystem, ranging from winter sports, hiking, cycling and mountaineering to golf, sailing, kayaking, diving and other water sports. This is supported by an extensive network of recreational routes and infrastructure, including EuroVelo, European Greenways and European long-distance hiking trails, which contribute to sustainable mobility, cross-border connectivity and the attractiveness of destinations. Furthermore, Europe's diverse sporting offer, from spectator events in football, cycling, rugby and athletics to participatory events such as marathons, attracts visitors throughout the year and can help diversify tourism demand beyond traditional peak seasons, while supporting local economies.

Building on the social, cultural and health-enhancing value of sport, sport tourism can serve as a strategic instrument for sustainable and long-term local and regional development. It contributes to economic activity across a wide range of sectors, including accommodation, transport, retail and hospitality, while supporting quality employment and extending visitor flows beyond traditional tourism hotspots and peak seasons. When planned responsibly and proportionately, it can foster territorial cohesion, promote and protect natural and cultural heritage, and strengthen the resilience of destinations.

---

[33] European Commission, 'Quinta da Moscadinha', EU CAP Network, accessed November 2026.
[34] Council of the European Union and Representatives of the Governments of the Member States, 'Conclusions on Sport Tourism as a Contributor to Sustainable Development', Official Journal of the European Union, June 2026.
[35] European Parliament Research Service, Sports tourism: A strategic tool for sustainable and balanced EU tourism, January 2026.

Sporting events, in particular, can create lasting economic, social and environmental legacies by increasing participation in sport, strengthening community identity, improving infrastructure and raising the international visibility of host destinations. They can also accelerate the transition towards more sustainable tourism through integrated mobility planning, circular event management and closer cooperation between tourism, transport and sport stakeholders.

Furthermore, active and adventure tourism, represents a growing segment in Europe, bringing benefits to local communities and potential for developing lesser-known destinations. The economic significance of cycling tourism was already evident in 2012: according to a study of the European Parliament on cycling tourism, the latest data available[36], there were an estimated 2,295 million cycle tourism trips in Europe, with a value of EUR 44 billion per year.

River cruise tourism

Inland waterways are a strategic asset for sustainable and 'slow' tourism, combining transport, regional development, culture, and environmental objectives, with strong economic and international appeal. Tourism transport modes along rivers and inland waterways include sightseeing boats, river liners, barge hotels, rental boats, private yachting and ecotourism products like electric rental boats. Cooperation with DMOs and regions is essential to improve visitor experience, diversify destinations, and better balance tourism flows. The sector highlights key challenges that include climate impacts (e.g. drought), regulatory issues (e.g. licence recognition), and uneven tourism development across waterways.

Example: Voies Navigables de France (VNF)

VNF promotes more sustainable tourism along France's inland waterways by combining greener navigation with cycling and walking opportunities. Its activities include:

- Close collaboration with relevant local authorities to operate and manage cycling lanes.
- Development of VNF's properties to build accommodations for cyclists.
- Supporting the decarbonisation of inland navigation through cleaner vessel propulsion and onshore electricity supply.

Progress can be measured against the number of fleet engine replacements and retrofits, new infrastructures for onshore power supply, and additional availability of cycling lanes.

Social tourism

Social tourism covers tourism-related activities aimed at encouraging and supporting participation in tourism by economically weak or otherwise disadvantaged groups in society[37]. It aims to address situations of "tourism poverty" resulting from a lack of financial means or personal circumstances, including mental or physical conditions, that make participation in the overall tourism offer difficult[38]. These barriers are often interrelated and may reinforce one

[36] European Parliament, Policy Department B: Structural and Cohesion Policies, The European Cycle Route Network EuroVelo – Challenges and Opportunities for Sustainable Tourism (Vol. 1: Study; Vol. 2: Flyer), August 2012.
[37] Walter Hunziker, Sozialtourismus (1951), cited in Scott McCabe and Guanghui Qiao, 'A Review of Research into Social Tourism: Launching the Annals of Tourism Research Curated Collection on Social Tourism', 85 Annals of Tourism Research, article 103103, November 2020.
[38] European Economic and Social Committee, 'Opinion of the European Economic and Social Committee on Social Tourism in Europe', December 2006.

another. Closely linked to, and often associated with transport poverty[39], a lack of access to tourism may have an impact on social inclusion, health and well-being, personal development and education.

Europe has a rich tradition of social tourism, organised by public authorities at local, regional and national level and by trade unions, religious organisations, businesses and civil society. Social tourism can contribute to more balanced territorial development, as facilities are frequently located in less touristic areas and may operate outside the main tourism season. This supports local employment and economic activity, including for workers with special needs and other disadvantaged groups.

Example: Socio-economic dimension of social tourism

The Montreal Declaration of the International Social Tourism Organisation (ISTO)[40] stresses the positive societal dimension of social tourism, incudling social inclusion, participation, education and respect of host communities, while recognising its contribution to tourism growth, territorial development, skills and employment. It also sets out concrete recommendations for governments and tourism stakeholders, including on balanced tourism development.

Health and wellness tourism

Europe offers a large variety of health-related tourism services, ranging from advanced medical centres serving international patients to established rehabilitation and prevention healthcare facilities based on thermal water or coastal and mountain climates. These offers exist across the continent, many with a long history.

In line with a 2017 study from the EP[41], health tourism covers three pillars: medical, spa and wellness tourism. People may travel for medical treatment; they may seek well-being and relaxation or curative treatments. Often, these tourism segments may be connected in some specialised destinations or sought by customers in combination. In addition, more recent segments include offers like digital detox destinations.

The economic impact of health tourism is difficult to establish. The European Parliament study of 2017 estimates it to represent around 5% of general tourism in the then 28 EU Member States. It is seen as a growth market, not least given the EU's aging population and increased available income. [42]

[39] Commission Recommendation (EU) 2025/1021 of 22 May 2025 on transport poverty: ensuring affordable, accessible and fair mobility C/2025/3068, Official Journal of the EU, May 2025; European Commission, Factsheet Transport Poverty in the EU, May 2025.
[40] International Social Tourism Organisation (ISTO), Montreal Declaration: Towards a Humanist, Social Vision of Tourism; Aubagne Addendum; Brussels Addendum, October 2024.
[41] Tomas Mainil, Eke Eijgelaar, Jeroen Klijs, Jeroen Nawijn and Paul Peeters, Research for TRAN Committee – Health Tourism in the EU: A General Investigation, European Parliament, Policy Department for Structural and Cohesion Policies, June 2017.
[42] Tomas Mainil, Eke Eijgelaar, Jeroen Klijs, Jeroen Nawijn and Paul Peeters, Research for TRAN Committee – Health Tourism in the EU: A General Investigation, European Parliament, Policy Department for Structural and Cohesion Policies, June 2017.

The EU has a very long-established tradition in health tourism, and a corresponding large offer. Typically, health tourism has lower seasonal dependencies, with year-long destinations that sustain and help rebalance tourism flows. Often located in remote regions, destinations depend on good transport connectivity. Accessibility is of prime importance both for persons requiring medical attention, but also regular visitors aiming for wellness and spa treatments.

Example: European Spa Association (ESPA)

ESPA represents over 1,400 medical spas and health resorts as well as facilities for treatment, prevention, rehabilitation, and health and wellness tourism in Europe. The related European market contains approximately 10,000 facilities according to ESPA. The industry employs directly and indirectly around 850,000 people and has an annual turnover of approximately 50 billion euros. This means that the European facilities are not only an essential part of national and European health services but are also important economic contributors and offer employment[43].

Cultural tourism

Cultural tourism is a driver of economic growth and a bridge between cultures, contributing to the development of European regions. Europe's cultural heritage[44] is a valuable resource for tourism, education, employment and sustainable development. Cultural tourism may include visiting heritage and architectural sites, museums and other cultural spaces, attending performances, festivals and events, or participating in cultural activities, such as learning experiences and workshops. Cultural tourism can help diversify tourism flows beyond established destinations and peak seasons, support rural and peripheral areas, generate revenues for heritage conservation and create opportunities for local businesses, artisans and cultural and creative sectors. At the same time, its development needs to be managed carefully to avoid excessive pressure on heritage assets, local communities and the environment.

Sustainable cultural tourism[45] is an important component of regional and macro-regional development strategies. Tourism can facilitate access to culture and cultural heritage, but it can contribute to overcrowding, cultural appropriation and the loss of authenticity, while placing pressure on local communities and heritage assets. The UN Tourism Framework Convention on Tourism Ethics[46] stresses that "tourism policies and activities should be conducted with respect for the artistic, archaeological and cultural heritage, which they should protect and pass on to future generations; particular care should be devoted to preserving monuments, worship sites, archaeological and historic sites as well as upgrading museums which must be widely open and accessible to tourism visits". UNESCO, through its World Heritage Centre, offers tools and support for sustainable cultural tourism development, noting that "cultural tourism is one of the largest and fastest-growing global tourism markets. Culture and creative industries are increasingly being used to promote destinations and enhance their competitiveness and attractiveness"[47].

[43] European Spas Association (ESPA), 'Spa Medicine', accessed November 2026.
[44] European Commission, 'Cultural heritage', Culture and Creativity, accessed November 2026.
[45] European Commission, 'Sustainable cultural tourism', Culture and Creativity, accessed November 2026.
[46] World Tourism Organization (UNWTO), Framework Convention on Tourism Ethics, UNWTO, Madrid, 2020, accessed November 2026.
[47] UNESCO World Heritage Centre, 'World Heritage and Sustainable Tourism Programme', accessed November 2026.

Sustainable cultural tourism places cultural heritage and local communities at the centre of decision-making. Involving local communities and other stakeholders helps ensure that tourism benefits residents and supports heritage conservation. This calls for integrated governance models bringing together local and regional authorities, heritage managers, destination management organisations, residents and civil society, cultural and creative sectors, transport providers, and education and youth stakeholders. Its objective is to balance cultural, social, environmental and economic benefits, rather than focusing solely on visitor numbers, while ensuring that cultural experiences are accessible and inclusive, including for young people and persons with disabilities.

The 2025 Commission Communication on a Culture Compass for Europe[48] recognises sustainable cultural tourism as a catalyst for heritage protection, social cohesion, environmental sustainability and economic competitiveness. The 2019 report on sustainable cultural tourism[49] by the Open Method of Coordination group of Member State experts also highlighted the importance of cooperation between tourism and cultural stakeholders, community participation and integrated approaches to tourism and heritage management.

The European Capitals of Culture (ECoC)[50] initiative contributes to the cultural attractiveness of European cities and regions, while encouraging cultural participation and longer-term local development. The Commission's proposal for the ECoC action for 2034-2047 explicitly seeks to strengthen synergies with sustainable tourism. The forthcoming proposal for a European Heritage List also offers an opportunity to reinforce links between cultural heritage and sustainable tourism, in line with the objectives of the EU Sustainable Tourism Strategy.

The European Heritage Label (EHL)[51] initiative highlights heritage sites that have played a significant role in European history, integration and the promotion of common European values as drivers of education, tourism, and community pride. Often located outside major tourist hubs, EHL sites have a growing relevance for sustainable cultural tourism, notably for visitors seeking meaningful, values-driven and educational travel experiences with a European dimension. The Commission will continue to support EHL sites to position themselves as exemplars of high-value, educational, inclusive and low-impact cultural visitation.

DiscoverEU[52] is an especially promising instrument for educational, inclusive and sustainable cultural tourism because it already links youth, mobility and Europe, encouraging young people to explore Europe's cultural heritage through more sustainable modes of transport. It has strong synergies with other EU actions, notably the European Heritage Label. The Commission is using the DiscoverEU Culture Routes to promote lesser-known destinations, to incentivise off-season travel, and to reward the completion of sustainable train-based youth cultural itineraries linking heritage, learning and responsible travel. Together with the European Capitals of Culture and the European Heritage Label, DiscoverEU can also contribute to promoting

[48] European Commission, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A Culture Compass for Europe, COM(2025) 785 final, November 2025.
[49] European Commission, Directorate-General for Education, Youth, Sport and Culture, Sustainable Cultural Tourism, December 2019.
[50] European Commission, Proposal for a Decision of the European Parliament and of the Council renewing a Union action for the European Capitals of Culture for the years 2034 to 2047 and repealing Decision No 445/2014/EU, COM(2026) 455 final, September 2026.
[51] European Commission, European Heritage Label Sites, accessed November 2026.
[52] European Commission, DiscoverEU, accessed November 2026.

Destination Europe by showcasing the diversity of Europe's cultural heritage, including lesser-known destinations and experiences.

Example: EU cultural tourism cooperation

The EU-funded IMPACTOUR[53] project of twelve partners from nine EU Member States connected stakeholders and researchers, envisaging new approaches and methods to support European cultural tourism, reinforce a feeling of belonging, and value minority cultures. The project covered more than 20 European sites. It worked on an advanced and adaptable methodology to estimate the impact of cultural tourism on EU regional economic growth and combine data analytics algorithms with machine learning and AI approaches to improve policies and actions.

1.2 Measuring tourism flows and impact

The Strategy, this Staff Working Document and the tourism ecosystem more broadly, draw on multiple sources of tourism data, reflecting the complexity and diversity of the tourism ecosystem. The public debate often uses values that are not always grounded in clear methodology or easily understood. For that reason, this chapter first gives an overview of various approaches to tourism statistics and data, and to calculating its economic and societal impact.

1.2.1 Data sources and approaches

No single source captures the full complexity of tourism at European level. Official statistics, operational dashboards, market intelligence and international comparative data each fulfil different but complementary functions in supporting evidence-based policymaking. Official EU tourism statistics are based on Regulation (EU) 692/2011 on Tourism Statistics[54]. It requires EU countries to collect, draw up, process and transmit to Eurostat harmonised statistics on supply and demand in tourism *only* in terms of *capacity* of certain types of tourist accommodation establishments (number of establishments, number of bedrooms, number of bed places), *occupancy* of establishments (arrivals, nights spent) and *national demand* for tourism (trips made by EU residents). Since 2020, Eurostat also receives data directly from three major short-term rental platforms, allowing to publish statistics on short-term rentals. Beyond the regulation, Member States tend to have their own policies and other types of national data. Eurostat's online database on tourism already incorporates data from other business statistics (Structural Business Surveys), social statistics (Labour Force Survey), or environmental statistics. The harmonisation and coordination of data gathered by the European Statistical System may come with a trade-off in terms of publication delay. Together, these official data sources also provide the basis for measuring tourism sustainability. A first set of harmonised European indicators on the sustainability of tourism was released in July 2026[55].

[53] IMPACTOUR, 'Improving Sustainable Development Policies and Practices to Access, Diversify and Foster Cultural Tourism in European Regions and Areas', accessed November 2026.
[54] European Parliament and Council of the European Union (2011). Regulation (EU) No 692/2011 of the European Parliament and of the Council of 6 July 2011 concerning European statistics on tourism and repealing Council Directive 95/57/EC. Official Journal of the European Union, July 2011.
[55] Eurostat, 'Information on data – Tourism', accessed November 2026.

The EU Tourism Dashboard[56] complements European official statistics by bringing together a broader set of descriptors and indicators of EU's tourism destinations, across a number of policy relevant domains: environment, socioeconomicresilience, and digitalisation of tourism. Combining different methodologies and data sources, it provides a user-friendly and interactive monitoring tool at EU, national and regional level, allowing users to compare destinations over the years across a range of tourism-related indicators. Depending on the indicator, data may be available at levels as granular as Local Administrative Units (i.e. municipalities) and NUTS3 regions (i.e. districts or provinces). For some indicators, data is only available at Member State level. The EU Tourism Dashboard is managed by the European Commission's Directorate-General for Mobility and Transport (DG MOVE) and developed by the Joint Research Centre (JRC).

The Industrial Ecosystems Dashboard[57], developed by the Directorate-General for Internal Market, Entrepreneurship and SMEs (DG GROW), provides comparative data for 14 major industrial ecosystems, tourism being one of them. This Dashboard provides regularly updated economic data (turnover, value added, employment, vacancies, enterprise size, workforce demographics), compiled and presented through its own unique methodology. The presentation of the relative weight of the main sectors of economic activity in the EU offers a useful perspective, not least for policymaking and political prioritisation.

EU-funded projects such as DEPLOYTOUR[58] and D3HUB[59] contribute to strengthening Europe's tourism data landscape. They support the development of the Common European Tourism Data Space and explore approaches for sharing, analysing and using tourism data by businesses, destinations and public authorities. The European Commission also supports the European Travel Commission (ETC) on its market intelligence on long-haul source markets, traveller sentiment, consumer behaviour and market trends. Its research can be used both for destination marketing and strategic policy development.

The European Commission also cooperates closely with international organisations, notably the OECD and the United Nations and its specialised agencies. The EU participates in the OECD's Working Party on Tourism Statistics and financially supports specific OECD work, including tourism-related reporting and statistical capacity-building[60]. The World Tourism Organization (UN Tourism)[61] is the leading global source of tourism statistics and plays an important normative role in developing international statistical standards, definitions and sustainability measurement frameworks, like the Tourism Satellite Accounts. Many private operators collect and analyse tourism data using their own methodologies. While main findings may be openly shared and disseminated, full reports and detailed analysis are typically personalised and sold to business clients, researchers and destinations, hence restricting comparability.

[56] EU Tourism Dashboard, accessed November 2026.
[57] European Commission, European Monitor of Industrial Ecosystems, accessed November 2026.
[58] DEPLOYTOUR, Deployment of the European Tourism Data Space, accessed November 2026.
[59] D3HUB Competence Centre, Data-Driven Destinations Hub, accessed November 2026.
[60] OECD, On-Line Guide to OECD Intergovernmental Activity, accessed November 2026; OECD, Strengthening the Evidence Base for a Sustainable Tourism Future in Malta: A Toolkit to Operationalise a Tailored Set of Sustainability Indicators, January 2025.
[61] UN Tourism, UN Standards for Measuring Tourism, accessed November 2026.

1.2.2 Economic weight

If there is general understanding that tourism has considerable economic weight, the exact extent of this weight is complex to establish, mainly because measurement methodologies differ across countries and because the attribution of certain activities to tourism is difficult to assess (for instance, services catering both to residents and visitors). Measurements may refer to direct, indirect or induced economic impact of tourism.

The most rigorous exercise to assess the direct economic value of tourism at EU level are the Tourism Satellite Accounts for Europe (TSA)[62]. However, their voluntary and experimental character makes them slow and incomplete (released by Eurostat in March 2026 for the reference year 2022, with 24 Member States participating). Inclusion of TSA is expected in the upcoming revision of the Tourism Statistics Regulation.

Estimating tourism Gross Domestic Product (GDP) is challenging because tourism is not a separate industry in national accounts, but is instead defined by the consumer's status and behaviour. The same product (including accommodation, transport, restaurants, retail, culture and recreation) can therefore be tourism-related or non-tourism-related depending on who purchases it. Compilers must distinguish visitors from residents and other travellers, separate domestic production from imports, allocate expenditure among products and industries, account for package travel and intermediary margins, and estimate informal or poorly recorded activity. GDP also requires allocating taxes on products and imports, less subsidies, to tourism consumption; this is complicated by different VAT rates, exemptions, excise duties and the fact that taxes are not always proportional to tourism output[63].

Gross value added (GVA) is used throughout this Staff Working Document as the principal measure of tourism's economic contribution, in line with Eurostat practice and the internationally acknowledged TSA methodology. Unlike Gross Domestic Product (GDP), GVA can currently be estimated more consistently for tourism activities through existing statistical methodologies, by identifying the share of each industry's production attributable to visitor demand and applying that share to the industry's existing value added[64]. Estimates of the share of tourism activity on total GVA may differ depending on the accounting method and on whether direct, indirect or induced effects are taken into account. Below are highlighted four progressively broader approaches to measure the economic weight of tourism:

- The narrowest approach expresses the direct contribution, measuring the value added generated by serving visitors, which stood at around EUR 517 billion, or 3.6% of EU GVA, in 2022, the last year available from Eurostat[65], and reaching 4.1% in 2025 according to estimates from the Joint Research Centre[66]. It should be noted that the reference year 2022 was still affected by the aftermath of the COVID-19 pandemic; in 2019, tourism direct GVA was estimated at EUR 572 billion, or 4.5% of EU GVA[67]. Each euro of direct tourism value added is estimated to generate a further EUR 0.61 of

[62] Eurostat, Tourism Satellite Accounts in Europe – 2026 edition, March 2026.
[63] United Nations, World Tourism Organization, European Commission and OECD, Tourism Satellite Account: Recommended Methodological Framework 2008, accessed November 2026.
[64] Tourism direct GVA $= \sum_i$ Tourism share of output$_i$ x GVA$_i$, while Tourism Direct GDP = TDGVA + tourism-related taxes on products and imports − tourism-related subsidies on products and imports.
[65] Eurostat, Tourism satellite accounts on Europe, March 2026.
[66] EU Tourism Dashboard, 'Economic impacts of tourism', accessed November 2026.
[67] Eurostat, Tourism: €572 billion gross value added in the EU, April 2023.

value added in upstream sectors such as transport, retail and agriculture, illustrating the strong interconnections between tourism and the wider economy[68].

- Another approach to measure the economic size of tourism considers tourism industries, including activities serving both visitors and residents. These comprised 2.7 million enterprises employing 13.4 million people, accounting for 8.3% of business economy employment and 4.9% of its value added in 2023[69].
- The broader tourism ecosystem approach accounts for approximately EUR 866 billion, 7.3% of EU value added, 4.6 million companies and more than 20 million jobs in 2025. This ecosystem measure extends beyond tourism's direct contribution and cannot be fully reproduced from publicly available data; it is therefore presented as an estimate[70].

The Strategy uses the broadest approach to measure tourism weight as its headline figure. It builds on the direct impact taken from Tourism Satellite Accounts and adds the estimated indirect and induced economic effects of tourism expenditure, using a peer-reviewed method[71]. The indirect effects originate upstream from the supply chain supporting the tourism sector, and the induced effects stem downstream from the re-spending of income earned through tourism-related activities on other goods and services in the economy. Based on a recent implementation of this method, the Joint Research Centre estimates a total economic impact of 10.1% of EU GVA in 2025. [72] The following table summarises these measures for ease of reference:

Table 2 – Scoping tourism economic weight

Measure	Scope	Reference year[73]	Estimate
Direct contribution	Value added generated by serving visitors (Tourism Satellite Account)	2022	€517 billion (3.6% of EU GVA)
Tourism industries	Tourism industries covered by official structural business statistics	2023	€515 billion (4.9% of business economy value added); 2.7 million enterprises; 13.4 million jobs
Tourism ecosystem	Broader tourism ecosystem estimate used in the Strategy	2025 (estimate)	€866 billion (7.3% of EU GVA); 4.6 million companies, >20 million jobs

[68] OECD, OECD Tourism Trends and Policies 2026, July 2026.
[69] Eurostat, Tourism industries – economic analysis, March 2026, .
[70] European Commission, Industrial Ecosystems Indicators Dashboard, accessed November 2026.
[71] Figini, P., Patuelli, R., Curtale, R. and Batista e Silva, F., 'Give me a number. Evaluating economic impacts of tourism', Current Issues in Tourism, November 2025.
[72] EU Tourism Dashboard, 'Economic contribution of tourism', accessed November 2026.
[73] The different reference years reflect the availability of the underlying datasets. Official tourism statistics, Tourism Satellite Accounts and ecosystem estimates are compiled using different methodologies and publication cycles. The estimates are therefore not directly comparable.

Total impact	**Value added generated by serving visitors, supply chain supporting the tourism sector and re-spending of income earned through tourism-related activities**	**2025 (estimate)**	**10.1% of EU GVA**

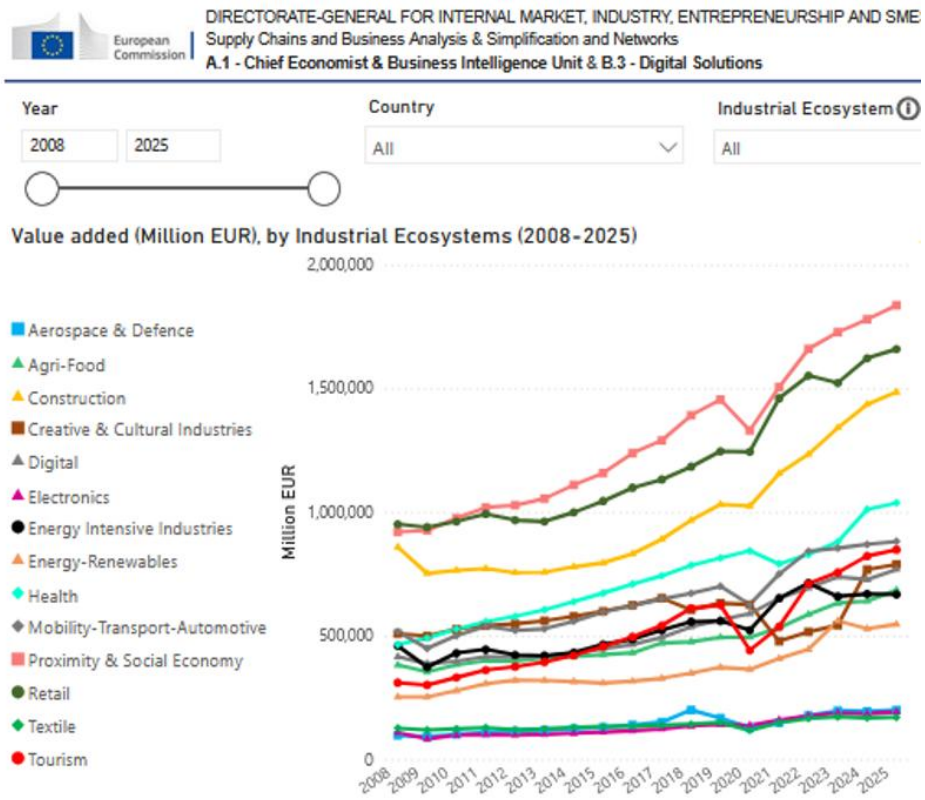
Tourism operates as a value chain rather than a single industry. It is composed overwhelmingly of small firms. Around 99% of tourism enterprises are small or medium-sized, and most are micro-enterprises. The tourism value chain extends across accommodation and food services, travel agencies and tour operators, online booking platforms, passenger transport, visitor attractions, and culture and heritage. Accommodation and food services account for around 70% of tourism enterprises, comprising approximately 15% in accommodation and 54% in food and beverage services in 2023[74]. The remainder is spread across passenger transport, attractions and recreation, and travel services. This structure explains why EU tourism policy relies primarily on coordination, cooperation and support measures rather than sector-specific regulation, and with EU competences reflected as such in Article 195 of the Treaty.

Tourism's economic importance varies considerably across the Union. It accounts for a particularly large share of economic activity and employment in several Member States, including Greece (23% of the business economy employment), Cyprus (16%) and Malta (13%). In many other Member States, tourism nevertheless remains an important regional employer and source of economic activity, even where its national share is lower[75].

Taken together, tourism represents one of the EU's largest industrial ecosystems. Its economic impact extends well beyond tourism businesses themselves through strong linkages with transport, mobility, retail, culture, construction, agri-food and the digital economy.

[74] Eurostat, Tourism industries – economic analysis, March 2026.
[75] Eurostat, Tourism Industries – Economic Analysis, March 2026. For example, Finland: 6.4%; Poland: 3.8% of business economy employment. .

Chart 1 – Comparative weight of major EU industrial ecosystems



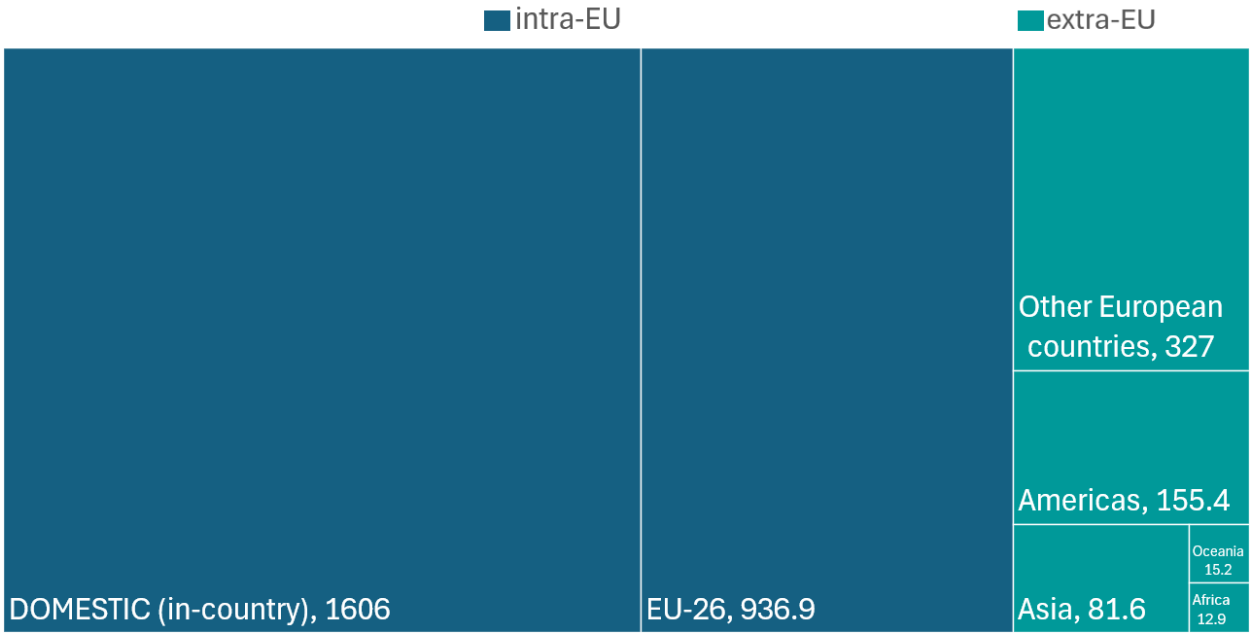
Source: Industrial Ecosystems Indicators Dashboard[76]

1.2.3 Tourism demand, distribution and seasonality

Europe remains the world's leading tourism region, accounting for around 810 million international tourist arrivals in 2025, more than half of global cross-borders arrivals (52%). The EU represents the largest tourism market within Europe, welcoming almost 600 million international tourist arrivals (39%)[77]. EU tourist accommodation establishments recorded 3.14 billion nights in 2025, following 3.02 billion overnight stays in 2024[78], the first year to exceed the three billion threshold. In 2024, tourism demand in the EU was almost evenly split between domestic visitors (residents staying within their own country) and international visitors (arriving from another country, whether another EU Member State or a non-EU country), with domestic tourism accounting for 51.1% of overnight stays and international tourism for 48.91%. International demand was itself predominantly European: 60.9% of international overnight stays originated from other EU Member States, while a further 21.3% came from other European countries not part of the EU. Visitors from the rest of the world accounted for 17.2% of international nights, including 7.7% from North America and 5.3% from Asia. This illustrates both the importance of the Single Market for tourism and the continued relevance of long-haul markets for Europe's international competitiveness.

[76] European Commission, Industrial Ecosytems Indicators Dashboard, accessed November 2026.
[77] UN Tourism, World Tourism Barometer, Vol. 24, Issue 2 (May 2026), Statistical Annex, "International tourist arrivals by (sub)region", May 2026.
[78] Eurostat, Tourism statistics – annual results for the accommodation sector, accessed November 2026.

Chart 3: Nights spent in accommodation in the EU by origin of the visitor (2025, millions)



Source: Eurostat[79]

Tourism is also an important export sector for the EU. This can be measured in two complementary ways. On a global receipts basis, the EU earned 23.5% of worldwide international tourism receipts in 2024, of which 15.9% originated from travel within the EU and 9.9% from visitors arriving from outside the Union[80]. On an external trade basis, extra-EU exports of travel services amounted to around EUR 205 billion in 2025, representing 10.9% of total extra-EU exports of services[81]. These indicators measure different aspects of tourism's international economic contribution but both confirm the economic value of tourism for the EU.

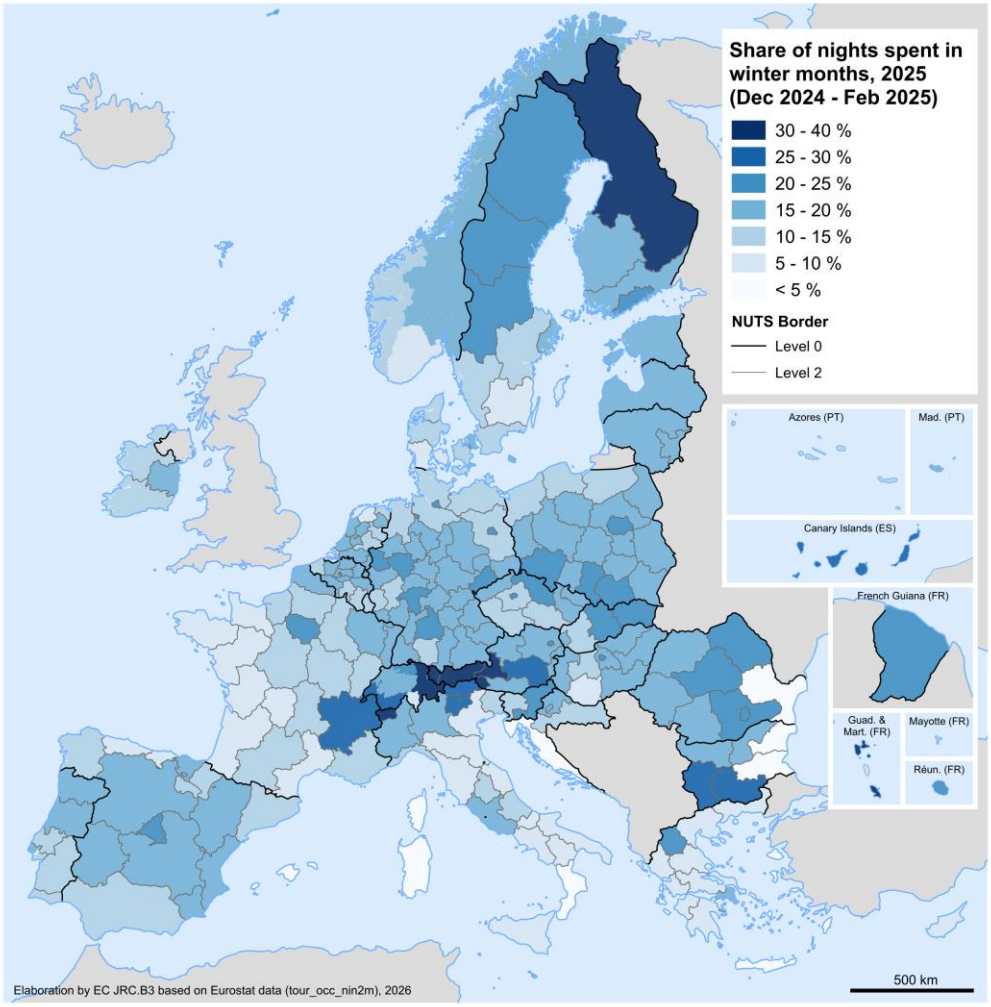
While tourism demand continues to grow, it remains highly concentrated geographically and seasonally. In the third quarter of 2025, the twenty most visited NUTS2 regions were located in just six Member States (France, Spain, Italy, Greece, Portugal and Croatia)[82]. Within destinations, visitor flows are often even more concentrated. Tourism demand is also strongly seasonal, with visitor numbers peaking during the summer months, particularly in coastal destinations. On average across the EU, 42% of all nights spent are concentrated in the three most popular months at each tourism destination, reaching more than 50% in some EU countries[83]. This pattern is reflected across EU economies (although capital cities tend to experience more stable demand and some regions have their high season in winter), where around one third of tourist nights occur during the two busiest months of the year (up to 54% in Croatia, 43% in Bulgaria and 42% in Greece)[84].

[79] Eurostat, Nights spent in tourist accommodations up 4% in 2025, October 2026; Eurostat, Record Number of Tourism Nights in 2024 in the EU, October 2025.
[80] Eurostat, Key figures on the EU in the world – tourism earnings, August 2025 (updated with 2024 data).
[81] Eurostat, International trade in services by type of service, January 2026 (updated with 2025 data).
[82] Eurostat, Tourism nights booked via platforms hit nearly 1 billion (April 2026), accessed in November 2026.
[83] EU Tourism Dashboard, 'Tourism seasonality', accessed November 2026.
[84] Eurostat, Seasonality in the tourist accommodation sector, September 2025.

High concentrations of visitors in specific places and periods can put pressure on housing, transport, public services, cultural heritage and natural resources, while tourism infrastructure remains underused during the rest of the year. Conversely, many rural, inland and peripheral destinations continue to have significant untapped tourism potential. Managing tourism demand more evenly across destinations and throughout the year has therefore become a central objective of tourism policy at destination, national and European levels.

The territorial and seasonal concentration of tourism is compounded by another vulnerability: many destinations rely on too few markets for their foreign tourism demand. On average across the EU, 21% of all nights-spent by foreign visitors come from only three countries of origin[85]. This market concentration, combined with the territorial and seasonal concentration of tourism demand, makes destinations more exposed to shocks and calls for greater diversification.

Chart 4: Share of nights-spent in winter months (December 2024-February 2025) per region



Source: European Commission, JRC elaboration

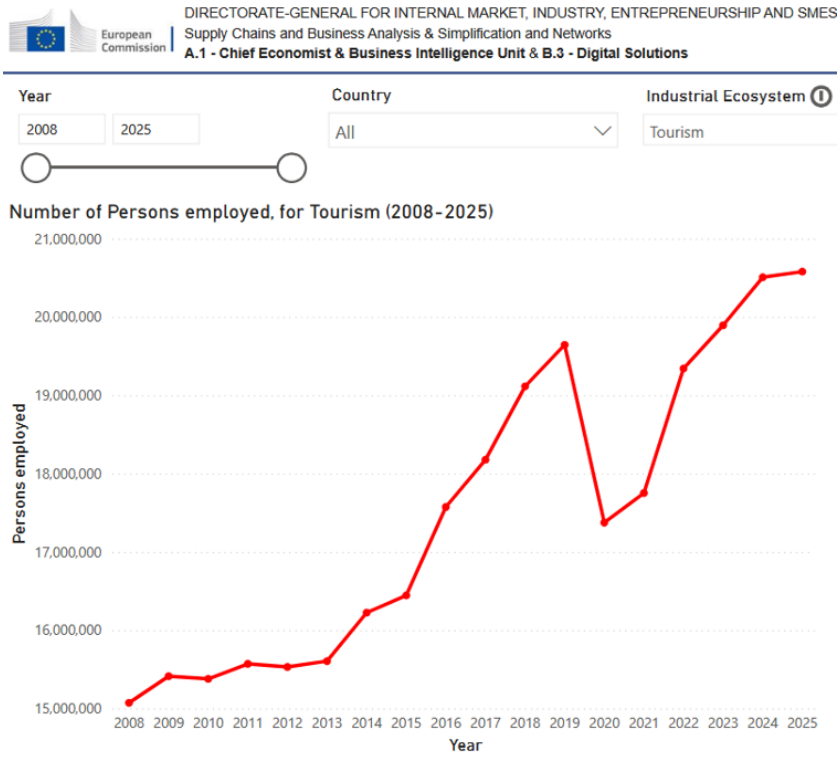
[85] EU Tourism Dashboard, 'Dependence on top 3 countries of origin', accessed November 2026.

Although no unique indicator currently exists to measure tourism pressure or overtourism, work is progressing through the EU Tourism Dashboard and Eurostat's sustainability indicators (comprising indicators on tourism density and tourism intensity at regional level), as well as other initiatives to strengthen the evidence base for destination management and more balanced tourism development. At the same time, tourism demand continues to evolve. Market intelligence produced by the European Travel Commission indicates growing interest in sustainable tourism, authentic local experiences and travel beyond the traditional peak season, while international long-haul demand continues to increase. These trends create new opportunities to diversify Europe's tourism offer, strengthen lesser-known destinations and support more balanced tourism throughout the year[86].

1.2.4 Employment

The tourism ecosystem is one of the EU's largest sources of employment, supporting more than 20 million jobs across the broader tourism ecosystem in 2025[87]. Employment is spread across a wide range of activities, including accommodation, food services, passenger transport, travel services, culture, recreation and visitor attractions. As many tourism activities are located outside major urban centres, the sector also makes an important contribution to employment, economic cohesion and the vitality of rural, coastal, mountain and outermost regions, as well as in other destinations facing demographic decline.

Chart 3: Tourism Employment



Source: Industrial Ecosystems Indicators Dashboard

[86] European Travel Commission (ETC), Monitoring Sentiment for Intra-European Travel and Long-Haul Travel Barometer, accessed November 2026.
[87] European Commission, Industrial Ecosytems Indicators Dashboard, accessed November 2026.

The composition of the workforce in tourism industries differs from that of the wider economy. It is predominantly female: women accounted for 58% of tourism employment in 2023, against 36% across the wider economy, with the highest shares in travel agencies, tour operators and accommodation[88]. Women remain generally underrepresented in management across the EU economy, holding around 35% of managerial positions in 2024[89]. Tourism also provides important entry opportunities into the labour market. The workforce is comparatively young, with 11% of workers aged 15 to 24, compared with 9% across the wider economy.

Working arrangements also differ from those in the wider economy. Part-time work accounts for around 21% of tourism employment, compared with 15% across the business economy, while temporary employment contracts account for 21%, against 12%. These characteristics reflect both the seasonal nature of many tourism activities and the diversity of business models across the ecosystem.

At the same time, employers across the tourism ecosystem face persistent labour and skills shortages[90]. Accommodation and food services recorded a job vacancy rate of around 3% in early 2026[91], among the highest of any economic sector and well above the economy-wide average of about 2%[92]. Stakeholders also report growing difficulties in attracting and retaining workers, reflecting demographic change, changing career expectations and increasing demand for new digital and sustainability-related skills. Addressing these challenges is therefore essential for the long-term competitiveness and resilience of European tourism.

By supporting employment and entrepreneurship across a wide variety of destinations, tourism can contribute to maintaining vibrant local communities and creating economic opportunities in areas affected by depopulation and demographic change. The EU is committed to promoting equality and gender equality across all sectors, including tourism, as part of its broader values of non-discrimination, inclusion and equal opportunities. In tourism, this means fostering equal access to employment, career progression and leadership positions, ensuring fair working conditions, and preventing discrimination and harassment in the workplace.

Tourism's economic weight, territorial dimension and cross-border nature make it a policy area where European cooperation can provide clear added value. While tourism development remains primarily the responsibility of Member States, regions and destinations, many of the factors shaping the sector, including connectivity, data, sustainability, skills, digitalisation and crisis preparedness, benefit from cooperation at Union level. These characteristics provide the context for the Strategy presented in the following chapters.

1.3 Trends and challenges shaping European tourism

European tourism is undergoing profound structural change. Climate change, demographic developments, technological innovation, geopolitical uncertainty and evolving visitor expectations are reshaping how, where and why people travel. These trends have been consistently identified in recent work by the OECD, the European Travel Commission (ETC), the European Environment Agency (EEA) and the Commission's Sustainable EU Tourism

[88] Eurostat, Tourism industries – employment, May 2024.
[89] Eurostat, Women held 35% of managerial positions in 2024, March 2026.
[90] HOTREC, Skills and Labour Shortages: A Roadmap for Action, January 2026.
[91] HOTREC, Skills and Labour Shortages: A Roadmap for Action, January 2026.
[92] Eurostat, Tourism industries – employment, May 2024.

project[93]. While these trends largely originate outside the tourism sector itself, they increasingly influence the competitiveness, resilience and sustainability of destinations across Europe.

These transformations are taking place against a backdrop of continued strong tourism demand. In 2025, EU tourist accommodation establishments recorded 3.14 billion nights, 4.1% more than in 2024. International demand grew faster than domestic demand, with nights spent by international visitors increasing by 3.4%, compared with 1.1% for domestic visitors[94]. Looking ahead, further growth is expected. UN Tourism forecasts international tourist arrivals worldwide to reach 2 billion by 2030, compared with around 1.5 billion in 2025[95]. This continued expansion will create further opportunities for European tourism, while increasing the importance of effectively managing visitor flows and their impacts on destinations, infrastructure, natural resources and local communities.

Climate change is already affecting tourism patterns through rising temperatures, more frequent extreme weather events, wildfires, water scarcity and changing snow conditions, with implications for destination attractiveness, seasonality and visitor flows. Geopolitical developments similarly influence tourism demand by affecting traveller confidence, transport connectivity and the accessibility of international markets. At the same time, demographic change, including population ageing and depopulation in many rural and remote areas, is altering both tourism demand and the availability of labour. Digitalisation and artificial intelligence are transforming the way tourism is marketed, booked and managed, while changing visitor expectations are increasing demand for authentic, sustainable and personalised experiences. Recent market intelligence also indicates a gradual shift from volume-based towards value-based tourism, with increasing demand for authentic experiences, longer stays, year-round travel and destinations offering strong environmental quality and local identity[96].

These trends extend beyond tourism policy and require coordinated responses across multiple policy areas, including transport, climate, employment, digitalisation and regional development. They also reinforce the importance of integrated destination management and stronger cooperation between public authorities, businesses and local communities. The following section examines how these structural trends translate into concrete challenges for European destinations.

The trends described above are creating a number of interrelated challenges for destinations, businesses and public authorities across Europe. Building on the analytical framework developed under the Sustainable EU Tourism project, these challenges can be grouped into four interconnected dimensions: economic competitiveness, environmental sustainability, social sustainability and governance[97]. While their relative importance varies across destinations, these dimensions are closely interlinked and require integrated destination

[93] OECD, OECD Tourism Trends and Policies 2026, July 2026; European Travel Commission (ETC), Long-Haul Travel Barometer 3/2026, October 2026; European Environment Agency (EEA), European Climate Risk Assessment, March 2024; European Commission, Report on the Identification of Key Challenges and Best Practices, Sustainable EU Tourism: Shaping the Tourism of Tomorrow, September 2024.
[94] Eurostat, Another record year for EU tourism in 2025, March 2026.
[95] UN Tourism, 50 Years of Tourism: Global Trends and Future Scenarios. Briefing Paper for the 26th UN Tourism General Assembly, November 2025.
[96] OECD, OECD Tourism Trends and Policies 2026, accessed November 2026; European Travel Commission (ETC), Long-Haul Travel Barometer 3/2026, October 2026.
[97] European Commission, Report on the Identification of Key Challenges and Best Practices, Sustainable EU Tourism: Shaping the Tourism of Tomorrow, September 2024.

management supported by coordinated action across different policy areas and levels of governance.

Economic challenges

Tourism remains characterised by high levels of seasonality, fragmented business structures and uneven territorial development. Many destinations depend heavily on a limited number of source markets or tourism products, while others have significant untapped tourism potential. Small and medium-sized enterprises dominate the ecosystem but often face limited access to finance, innovation, digital technologies and skilled workers. Increasing productivity, extending tourism throughout the year, diversifying tourism offers and strengthening the resilience of local tourism businesses are therefore becoming central objectives of tourism policy[98].

Environmental challenges

Tourism both depends upon and affects Europe's natural environment. Climate change, biodiversity loss, pressure on water and soil resources, waste generation and transport emissions increasingly influence destination attractiveness and competitiveness. At the same time, many destinations seek to reconcile visitor growth with environmental protection and the preservation of natural and cultural assets. Climate adaptation, decarbonisation, resource efficiency and biodiversity conservation are therefore becoming integral elements of destination management[99]. Natura 2000 protected areas cover large parts of the EU's territory, ranging from 9% to 38% of national territory, depending on the country[100]. While Natura 2000 aims to ensure the conservation of areas of high natural value, they can as well attract tourism flows, potentially leading to a conservation paradox if visitor flows are not managed appropriately[101].

Social challenges

Tourism can generate employment, entrepreneurship and territorial cohesion, but may also create pressures on housing, infrastructure and public services including transport where visitor numbers become highly concentrated. Ensuring that tourism benefits local communities, provides quality employment, remains accessible to diverse visitor groups and contributes positively to cultural heritage and local identity is therefore an increasingly important policy objective. Measuring and improving residents' quality of life and strengthening the social acceptance of tourism are also becoming key indicators of successful destination management[102].

---

[98] European Commission, Report on the Identification of Key Challenges and Best Practices, Sustainable EU Tourism: Shaping the Tourism of Tomorrow, September 2024.
[99] European Environment Agency (EEA), European Climate Risk Assessment, March 2024; European Commission, Report on the Identification of Key Challenges and Best Practices, Sustainable EU Tourism: Shaping the Tourism of Tomorrow, September 2024.
[100] EU Tourism Dashboard, 'Share of protected/designated land (%)' (2023), accessed November 2026.
[101] Seguin, R., Delbar, V., Batista, F. and Mouillot, D., 'Protected areas shape the distribution of tourism across rural Europe', People and Nature, 6(6), pp. 2246–2260, December 2024.
[102] European Commission, Report on the Identification of Key Challenges and Best Practices, Sustainable EU Tourism: Shaping the Tourism of Tomorrow, September 2024.

Governance challenges

Tourism governance is inherently complex. Responsibilities are distributed across different levels of government and across many policy domains, while destinations often involve numerous public and private stakeholders with different objectives. Many of the policies shaping tourism, including transport, environment, digitalisation, skills and home affairs, fall outside tourism administrations. Effective destination management therefore depends on coordination, reliable data, stakeholder participation and long-term planning rather than sector-specific regulation alone. The growing complexity of tourism also reinforces the need for better monitoring, shared indicators, crisis preparedness and stronger cooperation between destinations, Member States and the European Union[103].

[103] European Commission, Report on the Identification of Key Challenges and Best Practices, Sustainable EU Tourism: Shaping the Tourism of Tomorrow, September 2024.

Chapter 2. The path to the Strategy

Tourism policy in the European Union has traditionally been developed through cooperation between the European institutions, Member States and stakeholders. This reflects both the cross-cutting nature of tourism and the Union's supporting competence under Article 195 of the Treaty on the Functioning of the European Union (TFEU). Accordingly, the Strategy builds on an extensive process of consultation, dialogue and co-creation, while drawing on a long tradition of collaborative EU tourism policy.

2.1 The evolving EU policy context

EU tourism policy has evolved progressively over more than four decades. Long before tourism was recognised as an EU competence, under the Treaties, Member States recognised the added value of European cooperation on issues such as data, skills, accessibility and environmental protection. Many of these themes continue to underpin EU tourism policy today.

The Union had already been active in tourism since the 1980s, relying on other competences conferred by the Treaties[104]. The Council Resolution of 10 April 1984 on a Community policy on tourism identified the first areas for European cooperation[105]. This was followed by Council Decision 86/664/EEC of 22 December 1986[106] establishing a consultation and cooperation procedure and the Advisory Committee on Tourism, while the Maastricht Treaty (1993) recognised tourism among the Community's activities. With the entry into force of the Lisbon Treaty in 2009, tourism became an explicit area of EU supporting competence under Article 195 TFEU.

Figure 1. Article 195 of the Treaty on the Functioning of the European Union (TFEU)



7.6.2016 EN Official Journal of the European Union C 202/135

Article 195

1. The Union shall complement the action of the Member States in the tourism sector, in particular by promoting the competitiveness of Union undertakings in that sector.

To that end, Union action shall be aimed at:

(a) encouraging the creation of a favourable environment for the development of undertakings in this sector;

(b) promoting cooperation between the Member States, particularly by the exchange of good practice.

2. The European Parliament and the Council, acting in accordance with the ordinary legislative procedure, shall establish specific measures to complement actions within the Member States to achieve the objectives referred to in this Article, excluding any harmonisation of the laws and regulations of the Member States.

Source: Consolidated version of the Treaty on the Functioning of the European Union (OJ C 202, 7.6.2016)

Article 195 therefore provides the legal basis for an EU tourism policy centred on supporting competitiveness, encouraging a favourable environment for the development of tourism undertakings and promoting cooperation between Member States, while respecting their

[104] Estol, J. and Font, X. (2016), European tourism policy: Its evolution and structure, Tourism Management, Vol. 52, pp. 230–241, accessed November 2026.
[105] Council of the European Communities, Council Resolution of 10 April 1984 on a Community policy on tourism, April 1984.
[106] Council of the European Communities, Council Decision of 22 December 1986 establishing a consultation and cooperation procedure in the field of tourism, December 1986.

primary responsibility for tourism development. On this basis, the Union has progressively developed a strategic framework for tourism, responding to evolving economic, societal and geopolitical challenges while remaining within its supporting competence. The first policy framework under the Article 195 competence was the 2010 Commission Communication *Europe, the world's No 1 tourist destination*. The 2020 Communication *Tourism and transport in 2020 and beyond* set out the Union's immediate response to the COVID-19 crisis and the path to recovery. Building on this, in its Conclusions of 27 May 2021, the Council invited the Commission and Member States to co-design a European Agenda for Tourism 2030. In parallel, the Transition Pathway for Tourism (2022), co-created with stakeholders, represented the first transition pathway developed for an EU industrial ecosystem and identified 27 priority areas for action. Its implementation has been supported through a voluntary pledge mechanism, with more than 500 pledges submitted by around 240 organisations by mid-2025, demonstrating strong stakeholder engagement in the transition of the tourism ecosystem[107]. The pledges cover all 27 topics of the Transition Pathway and provide a valuable repository of practical actions and good practices through the EU Tourism Platform[108]. Illustrative examples are presented in the 2023 and 2024 stocktaking reports. The European Agenda for Tourism 2030, endorsed by Member States in the Council Conclusions of 1 December 2022, established a common framework for cooperation and invited the Commission to report on its implementation at least every three years.

The political momentum for a stronger European tourism policy has continued to grow. In 2024, the Political Guidelines for the 2024-2029 Commission and the mission letter of Commissioner Tzitzikostas confirmed tourism as a strategic priority. The Commission started with preparing a comprehensive EU Strategy for Sustainable Tourism. This direction was subsequently reinforced by the European Parliament, which adopted a Resolution on destination management and regional tourism growth in 2026, and by the Council Conclusions *Building a sustainable and competitive tourism for the future*. Together with earlier contributions from the European Economic and Social Committee and the Committee of the Regions, these institutional orientations, combined with extensive stakeholder input, provide the mandate for this Strategy and its proposed actions. The present Strategy builds on a broad institutional and stakeholder consensus and marks the next milestone in the evolution of EU tourism policy. Further details are provided below.

While the policy context has evolved considerably over the past four decades, several themes have remained remarkably consistent. These include cooperation between Member States, respect for subsidiarity, support for local and regional destination development, better tourism data and statistics, skills and employment, environmental sustainability, and integrated governance.

[107] European Commission, Stock-taking study of the co-implementation of Transition pathway for Tourism and EU Agenda 2030: D7 Final Report (prepared by PwC), October 2025.
[108] European Commission, EU Tourism Platform - Pledges, accessed November 2026.

Table 3. Key milestones in the development of EU tourism policy

Year	Milestone
1984	Council Resolution on a Community policy on tourism
1986	Advisory Committee on Tourism established
1992	Maastricht Treaty recognises tourism among Community activities
2009	Treaty of Lisbon introduces Article 195 TFEU
2010	Commission Communication *Europe, the world's No 1 tourist destination*
2015	European Parliament Resolution on new challenges and concepts for the promotion of tourism in Europe
2019	European Parliament Resolution on transport and tourism in 2020 and beyond
2020	Commission Communication *Tourism and transport in 2020 and beyond*
2021	European Parliament Resolution on establishing an EU strategy for sustainable tourism
2021	Council invites the co-design of a European Agenda for Tourism 2030/ Council conclusions of 27 May 2021 on *Tourism in Europe for the next decade: sustainable, resilient, digital, global and social*
2021	European Court of Auditors Special Report: EU support to tourism: need for a fresh strategic orientation and a better funding approach
2022	Transition Pathway for Tourism published
2022	Council Conclusions on a *European Agenda for Tourism 2030*
2024	Political Guidelines and Commission mandate strengthen the role of tourism
2025	EESC own initiative Opinion: *Tourism in the EU: sustainability as a driver for long-term competitiveness*
2025	Committee of the Regions own initiative Opinion: *Towards sustainable and resilient tourism in the European Union: Strategy for balanced and adaptive management*
2026	European Parliament Resolution on *enhancing connectivity, preserving cultural heritage, and driving local excellence in European tourism*
2026	Council Conclusions *Building a sustainable and competitive tourism for the future*
2026	Commission Communication *EU Strategy for Sustainable Tourism*

2.2 Summary of consultations and other public collaborative input

The preparation of the Strategy sought to reflect the diversity of the European tourism ecosystem and draw upon the expertise of its wide range of private and public stakeholders. To this end, the Commission implemented a broad consultation and engagement process, combining formal consultation instruments (open and targeted consultations and a call for evidence), targeted dialogues (youth and stakeholder dialogues) and broader exchanges during conferences and events, notably the European Tourism Day 2026. The following sections provide an overview of the consultation process.

2.2.1 Open and targeted public consultations

In the run up to Strategy, the Commission designed an ambitious consultation strategy and collected feedback from a diverse range of stakeholders involved or affected by the implementation of the Strategy. It was designed in line with the Commission's Better

Regulation Toolbox (Tool #54)[109], following the principles of inclusiveness, transparency, proportionality, and methodological rigour. The process combined three distinct consultation activities, balancing broad public participation with targeted and more structured input from experienced stakeholders. It included:

- **A targeted consultation (TC),** conducted over a twelve-week period ending on 15 August 2025, gathered structured feedback from experienced sectoral stakeholders and received 603 responses.
- **An open public consultation (OPC),** running from 20 June to 12 September 2025, allowed for participation from citizens and stakeholders via the Commission's "Have Your Say" platform[110]. It reached 397 respondents.
- **A call for evidence (CfE),** launched in parallel with the OPC, provided an additional channel for stakeholders to submit position papers and technical contributions, leading to 76 submissions.

Table 4: Overview respondents for the three consultation channels:

Stakeholder category	Targeted consultation	Open public consultation	Call for evidence
Association	110	42	28
Company/business	103	56	12
Destination management organisation	84	-	3
Local administration	82	23	4
Civil society	72	28	9
Academia and research	47	10	2
Other	38	13	2
National administration	36	8	3
Citizen	21	217	11
International organisation	7	-	2
EU entity	1	-	-
Total	**603**	**397**	**76**

The following summary presents the main findings of the online targeted consultation (TC) and open public consultation (OPC), organised by the Strategy's main policy areas.

Competitiveness:

- There was strong alignment on **skills** as a priority, including skills academies and apprenticeships/work-based learning as primary means to address workforce shortages and close skills gaps. While upskilling and reskilling emerged as a top priority for all stakeholder groups, followed by fair and attractive working conditions, citizens responding to the OPC prioritised fair and attractive working conditions over upskilling and reskilling.
- Facilitating access to **affordable and user-friendly digital solutions** emerged as the main priority for accelerating the digital transformation of tourism businesses,

[109] European Commission, Better Regulation Toolbox, Tool #54: Analysing Data and Informing Policymaking. Accessed November 2026.
[110] European Commission, EU Tourism Strategy 'Call for Evidence' (20 June - 12 September 2025), accessed November 2026.

particularly SMEs. Digital skills development ranked second overall, while Member States placed greater emphasis on collaboration with technology providers. The TC also showed strong support for data access and sharing, followed by digital upskilling and collaboration. The OPC highlighted collaboration as a top priority, including for rural areas, followed by the European Digital Identity.

- Reducing **administrative burden** and simplifying **access to funding** emerged as the main priorities for boosting competitiveness. The OPC also highlighted the need for better policy coordination at EU level, while stakeholders consistently identified the complexity of application procedures as the main obstacle to accessing EU funding.

Sustainability:

- A cross-cutting theme across the TC, OPC and CfE was the role of **smart tourism** in helping destinations address unbalanced tourism. The OPC also highlighted the importance of developing common EU standards and definitions for smart destinations.
- The three highest-ranking (and equally scoring) **environmental priorities** across both the TC and OPC were mitigating environmental impacts, promoting sustainable travel and climate adaptation.
- The main **social sustainability priorities** identified across the TC, OPC and CfE were addressing unbalanced tourism development and ensuring the inclusion of host communities.
- **Accessibility priorities** identified in the TC included improving accessibility for diverse traveller groups and across income levels, financial support for destinations to invest in accessible infrastructure and services, training for tourism professionals, and cooperation with disability stakeholders. The OPC produced similar findings, although citizens also placed particular emphasis on the safety of vulnerable groups.

Connectivity:

- Improving **rail connectivity and usability** emerged as by far the highest priority, with cross-border high-speed rail and digitally accessible rail ticketing clearly ranking first.
- Improving (sustainable) connectivity overall was a recurrent concern, and in particular for remote, rural and mountainous areas, and for islands and outermost regions.
- Respondents stressed the importance of sustainable travel, and of a low carbon mobility offer, including multi-modal solutions, as part of a wider (transport) decarbonisation agenda.

Outreach and branding:

- Stakeholders broadly agreed that Europe should build its international attractiveness on its cultural heritage, sustainability and diversity. The TC identified positioning Europe as a **sustainable tourism leader** as the highest priority, followed by showcasing its **rich culture and history,** while the OPC ranked these two priorities in the opposite order. Rural areas and outermost regions placed greater emphasis on promoting tourism beyond major cities and increasing the visibility of lesser-known destinations. Member States also highlighted safety and security as an important element of Europe's attractiveness.
- Stakeholders supported stronger **coordination of Europe's international promotion** while recognising the importance of preserving regional and local identities. The preferred promotion channels were social media and tourism websites and apps, while

Member States placed greater emphasis on influencer partnerships. Views were more mixed on the need for a single European tourism brand, with stronger support among Member States than among islands and outermost regions, which expressed greater preference for differentiated approaches reflecting their specific identities.

2.2.2 Targeted stakeholder dialogues

To complement the public consultation process and allow for direct interaction with sector representatives, the Commission organised three dedicated stakeholder dialogues in Brussels. Meeting minutes are available on the Commission's transparency webpage[111].

Stakeholder dialogue with hospitality and technology focused industry representatives (26 January 2026)

Stakeholders broadly agreed that tourism **policy must be co-designed with those responsible for implementation**, with stronger and more structured public-private cooperation at EU, national and destination level. There was consensus that policy coherence across EU initiatives affecting tourism remains insufficient, and that **fragmentation increases administrative burden and reduces effectiveness**. Participants stressed the importance of regulatory simplicity, proportionality and practical feasibility, particularly for **SMEs and micro-enterprises**. There was broad support for better coordination between digital, consumer, sustainability and labour policies, and for fair competition across different business models operating in tourism.

Skills shortages and labour constraints were identified as a structural challenge across all subsectors. Stakeholders converged on the need for joint EU-level action on upskilling and reskilling, including a Tourism Academy, for stronger links between education systems and tourism careers (including early exposure), and for improved working conditions and career prospects to attract and retain talent, with agreement that the perception of tourism employment needs to change, recognising its contribution to social cohesion and regional development. Better integration of migrant workers through skills-based approaches and social safeguards was also highlighted.

Broad agreement emerged that addressing **unbalanced tourism** requires active destination management. Solutions should combine demand management, dispersion, capacity planning and infrastructure investment, aligned with destination strategies. Community trust and resident acceptance were considered central to long-term sustainability. Stakeholders shared a multidimensional understanding of sustainability, including decarbonisation, energy transition and climate resilience, working conditions, housing affordability and community well-being, and business viability and long-term competitiveness. There was broad support for clear, harmonised sustainability frameworks, proportional requirements, and incentives—especially for SMEs—to invest in greener practices. Data, common standards and access to finance were seen as critical enablers.

Participants also converged on the importance of **digital tools and data**. Broad agreement emerged on the value of data sharing and partnerships to better understand and manage tourism flows, on the role of platforms and technology in smoothing demand peaks and supporting

[111] European Commission, Meetings of Commissioner Apostolos Tzitzikostas with Interest Representatives, accessed November 2026.

dispersion, on the need for clarity and consistency in digital and platform-related regulations, and on ensuring visibility and market access for smaller tourism businesses online.

Finally, there was convergence on the need for a strong, long-term EU approach to **branding and promotion**, for better alignment between sustainability objectives and market-facing communication, for stable and predictable EU funding for international tourism promotion, and for positioning tourism as a strategic asset and ambassador for Europe globally.

Stakeholder Dialogue with mobility and sectoral tourism representatives and related industries (25 February 2026) [112]

Airlines and airports highlighted the importance of air connectivity for international tourism, particularly for long-haul visitors. They warned about rising regulatory and sustainability costs. Regional connectivity and airport capacity were highlighted as strategic assets. Calls were made for visa facilitation, efficient border management (Entry/Exit System implementation), slot reform, more open-skies agreements and a balanced regulatory approach to ensure decarbonization without harming viability.

Rail and multimodality stakeholders argued for a stronger shift toward sustainable mobility, particularly high-speed rail and cross-border ticketing. They stressed the need for seamless digital ticketing, fair competition with aviation (polluter pays principle), and incentives to redirect flows to lesser-known destinations. Coaches, buses and ferries were positioned as ways to reduce overtourism and improve territorial cohesion, with investment in terminals and better integration into Trans-European Transport Network (TEN-T)[113] and Sustainable Urban Mobility Plan (SUMP)[114] frameworks needed.

Regarding **sustainability**, stakeholders emphasised adaptation to climate change, decarbonisation of transport and accommodation, investment frameworks to make sustainability "investable," and infrastructure readiness (e.g. marinas, EV charging). Several called for a shift from volume to value tourism, improved visitor flow management, and better use of data to tackle overtourism.

Digitalisation and data were repeatedly identified as enabling factors. Seamless multimodal ticketing, data-sharing frameworks, interoperable systems, and EU-wide standards are seen as crucial. Industry cautioned against overregulation in areas where digital solutions are already emerging, while SMEs called for support to manage digital transition and platform dependence.

SMEs, skills and social sustainability were also emphasised. Stakeholders requested simplified access to EU funding, targeted financial tools, better visa regimes (especially for business travel and cultural production), and protection of local authenticity. Skills shortages affect all transport modes and tourism services, requiring improved working conditions, training and stronger links between transport and tourism workforce policies. Accessibility and inclusion (EU Accessibility Act implementation) were also highlighted.

Cultural and business tourism actors stressed Europe's soft power — films, heritage, conferences, and events drive demand and promote lesser-known destinations. They called for

[112] European Commission, Meetings of Commissioner Apostolos Tzitzikostas with Interest Representatives, accessed November 2026.
[113] European Commission, Trans-European Transport Network (TEN-T), accessed November 2026.
[114] European Commission, Sustainable Urban Mobility Planning and Monitoring, accessed November 2026.

faster visa procedures, better statistics (including business travel data), and recognition of tourism's role in Europe's global positioning.

Stakeholder Dialogue with Mayors and representatives of regional and local organisations on empowering sustainable European cities for balanced tourism (24 March 2026)

Participants noted a series of major challenges cities are facing in developing tourism that is better balanced with the needs of local communities. This includes short-term rentals and housing and more generally questions of platform regulation and legal empowerment. **Spatial and seasonal concentration** was a core operational challenge, given at times extreme visitor flow concentration in small historic city centres. This contrasts with underused capacities and seasonal advantages in other cities and regions. Cities referred to a loss of neighbourhood identity with traditional local shops, crafts, and meeting places being replaced by tourist-oriented monoculture.

Governance fragmentation was a recurring point, with tourism impacted by mobility, accommodation, climate, and urban planning. Participants called for maintaining a regular dialogue with relevant policy areas, for instance digital, economic development, climate, and housing. This approach should extend to integrated investment plans instead of single-issue funding. Structured permanent dialogue and stronger cross-municipal and regional cooperation help manage tourism pressures and distribute benefits more fairly, participants stressed, putting local actors at the heart of the strategy.

Data sharing and common standards was considered a core area for attention, to make data available in real time at city level, not just in aggregate. Standardising data collection and indicators helps destinations work with comparable metrics. This could include a common EU methodology for measuring carrying capacity.

Mobility and integrated ticketing are core issues for cities and regions, including multimodal booking covering rail, coach, and aviation; booking a train should be as easy as is currently booking a flight. Ideas mentioned included joint public transport ticketing so that tourists need no separate app per city and funding to close cycling network gaps and support cycling tourism. Cities called for dedicated and direct access to EU funding for tourism infrastructure. Building for peak visitor volumes and everyday community needs simultaneously can bring enormous local advantages. Aspects of Member State internal taxation and distribution were mentioned.

Cities offered a multitude of local **success stories and good examples** for re-use by others and as inspiration for EU policy support. This included certification and upskilling, local short-term rental and retail approaches; data-driven visitor management adjusting mobility and communications in real time; consistent resident surveying to feed local concerns into policy; seasonal spread of events; combining urban trekking, biking, and walking trails that serve both tourists and residents, including development of bike lanes and electric urban mobility. Integrating smart tourism approaches with smart city development facilitates planning and management and benefits residents and visitors equally.

2.2.3 Youth Dialogues

Policy debates with young people are important opportunities for the Commission to identify policy ideas and to "pre-test" them for validity and implementability, and for expected impacts

on future generations[115]. Two dedicated youth dialogues were held to feed into the drafting of the present Strategy.

Youth Policy Dialogue with Commissioner Apostolos Tzitzikostas 6 March 2025, Brussels, Belgium

Participants called for improving rail infrastructure in underdeveloped areas, reducing train travel costs, and for easier ticket reservation processes along with access to travel information when involving trains from different companies. They recommended a combined effort between European and local institutions to improve infrastructure and travel experience. S**afety** is seen as a top priority in **rail travel** including for women or non-binary travellers, and accident rates, theft, and gender-based abuse directly affect perceptions about rail travel. They linked safety to **environmental concerns**, calling for measures to cut CO2 emissions and air pollution. Proposed solutions included creating city parking areas with public transport links, introducing hydrogen buses, and promoting cycling. Participants also pushed for better urban **mobility accessibility**, including more elevators, wheelchair passages, and sensor-based assistive devices.

Improving working conditions, training and workers' rights in transport and tourism was considered crucial for attracting a younger and more diverse workforce. Participants mentioned that many transport jobs are located in remote areas and difficult to access without a car. The seasonality and informality of some jobs in transport and tourism represent barriers to work in the sector.

Comfort and safety, closely linked to gender and ethnic origin, were mentioned as important to young people, also when **choosing a travel destination**. Other criteria are affordability and sustainability. Participants noted the influence of locations trending on social media when choosing a destination but also expressed concerns about contributing to tourism-driven housing pressures in urban areas and about unregulated tourism affecting cities' authenticity and neighbourhood dynamics.

Youth Policy Dialogue with Commissioner Apostolos Tzitzikostas 15 May 2026, Athens, Greece

Sustainable and balanced tourism was a central theme of the dialogue, reflecting concerns about overtourism, environmental pressures, and protecting local communities while maintaining Europe's competitiveness. Particular attention was given to destination management, dispersing tourism flows to lesser-known and rural areas, sustainable mobility, and promoting authentic tourism experiences over mass tourism.

Participants emphasised that tourism should be accessible, inclusive, and beneficial for residents as well as for visitors. **Accessibility for persons with disabilities** received particularly strong attention, with discussions focusing on inadequate assistance systems, lack of transparent information, affordability barriers, and difficulties faced by disabled travellers. Broader concerns also included affordability of travel for young people and ensuring tourism improves local quality of life.

A third major takeaway was the need to ensure tourism creates sustainable economic opportunities for workers, local businesses, and young entrepreneurs. Discussions focused on

[115] European Commission, Youth Policy Dialogues, accessed November 2026.

seasonal employment, working conditions, digitalisation challenges for small businesses, and the importance of training and upskilling.

2.2.4 Public debates and other targeted expert input into the Strategy

In addition to the public consultation and targeted stakeholder consultation, the Commission organised a series of thematic technical dialogues, workshops and expert meetings to gather specialised input on key policy areas of the Strategy. In particular, the Together for EU Tourism (T4T) expert group provided a structured forum for stakeholder input and in-depth discussions on key themes under the Transition Pathway for Tourism, contributing to the preparation of the Strategy. All these events brought together public authorities, international organisations, industry representatives, destination management organisations, academia and other experts to test policy ideas, exchange good practices and identify implementation needs. Their findings informed the preparation of several actions under the Strategy, including Destination Europe, balanced tourism management, skills development and stakeholder cooperation.

Together for EU Tourism (T4T) sub-groups (2023-2026)

The T4T initiative continued to support the implementation of the Transition Pathway for Tourism by bringing together stakeholders from across the tourism ecosystem to exchange good practices and develop recommendations on key transition challenges. Through its thematic sub-groups on green, digital, and resilience and skills, T4T provided a structured forum for cooperation between public authorities, destinations, businesses, academia and civil society.

The work of the sub-groups informed several areas addressed by this Strategy, including sustainable destination management, digitalisation, skills, balanced tourism, climate resilience and competitiveness. Activities included expert meetings, webinars, policy papers, practical guidance and contributions to the implementation of the Transition Pathway for Tourism and the preparation of Strategy. The T4T sub-groups have not only contributed recommendations to the preparation and implementation of EU tourism policy but also helped create a growing repository of practical knowledge and good practices through the EU Tourism Platform, ensuring that stakeholder expertise remains accessible beyond individual projects and events.

The **T4T Green transition subgroup** brought together more than 35 organisations from over 15 Member States and organised over 25 coordination meetings between 2023 and 2026. Its outreach activities included 8 public webinars, several of which attracted more than 200 to 300 participants, covering topics such as environmental impact measurement, food waste reduction, climate adaptation, low-carbon mobility, regenerative tourism and environmental sustainability as a driver of competitiveness. The subgroup also produced a policy white paper on sustainable destination management and regenerative tourism, supported by a practical implementation framework. In addition, it submitted individual and collective contributions to the Strategy's Open Public Consultation and the Transition Pathway stock-taking exercise, focusing on themes such as decarbonisation, competitiveness, and sustainable destination management. The subgroup further contributed to the joint final report of the three T4T subgroups on unbalanced tourism, which was presented following a dedicated hybrid event on 27 May 2025. The subgroup also produced and curated content to help populate the EU Tourism Platform on topics including regenerative tourism, sustainable destination management and related green transition priorities.

The **T4T Digital transition subgroup** brought together representatives from across the European tourism ecosystem to address key priorities related to digitalisation, data sharing and data-driven tourism. Its work has contributed to advancing the discussion around the European Tourism Data Space, improving the use and interoperability of tourism data, and demonstrating how digital technologies can strengthen destination management, sustainability and competitiveness. Among its concrete outputs, the subgroup and its dedicated task forces mapped existing approaches to tourism indicators and sustainability measurement, resulting in the report *Harmonising Tourism Statistics for Sustainability*[116], and facilitated exchanges between public authorities, destinations, technology providers, tourism businesses and European institutions on the practical implementation of data sharing. Through a series of thematic workshops and webinars between 2024 and 2026, the subgroup translated these priorities into practical examples and policy-relevant discussions. Topics included tourism indicators for sustainable development, effective use of digital tools for smart tourism management, the European Tourism Data Space and data-sharing models, the use of short-term rental data, multimodal travel and ticketing, Artificial Intelligence in destination management and tourism businesses, and the competitiveness of Europe's travel-tech ecosystem. These activities showcased concrete use cases and emerging technologies while addressing governance, skills, regulatory and business-model challenges. Overall, the subgroup has helped connect EU digital policy objectives with practical implementation across the tourism ecosystem, supporting destinations and businesses – including SMEs – in making better use of data and digital technologies and contributing to a more innovative, sustainable, resilient and competitive European tourism sector.

The **T4T Resilience, Skills and Inclusion subgroup** brought together representatives from public authorities, tourism businesses, destinations, academia, social partners and international organisations to support the implementation of the Transition Pathway in the areas of resilience, governance, skills development and inclusive tourism. Its work contributed to advancing policy discussions on destination governance, tourism resilience, labour market challenges, skills development, cross-border mobility and the long-term competitiveness of European tourism. A central pillar of the subgroup's work was the organisation of thematic webinars and expert exchanges that generated policy-relevant insights and practical recommendations. The webinar *Tourism Strategies Towards Resilience* (2024)[117] highlighted the importance of destination stewardship, resident engagement, evidence-based policymaking and multi-stakeholder governance in building resilient tourism ecosystems. The webinar *Renewing Tourism Education*[118] contributed to discussions on adapting tourism education and training systems to the green and digital transitions and addressing future workforce needs. In 2025, the webinar *Better Together: Improving Tourism Through a Collaborative Approach to Effective Governance*[119] showcased governance models and case studies from Vienna, Dublin, Gdansk, Flanders and Attica, demonstrating how stakeholder participation, destination data and long-term planning can strengthen resilience and improve public acceptance of tourism. The webinar *Better Cross-Border Travel: Europe's External Borders and Freedom of Movement* provided a forum for discussion on the implementation of EES and ETIAS, digital

[116] European Commission, Harmonising Tourism Statistics for Sustainability: A Report by the T4T Expert Group, November 2024.
[117] European Commission, Tourism Strategies towards Resilience, Webinar organised by the Skills & Resilience subgroup of the Together for EU Tourism (T4T) expert group, June 2024.
[118] European Commission, Tourism Education and Training, Webinar organised by the Skills & Resilience subgroup of the Together for EU Tourism (T4T) expert group, December 2024.
[119] European Commission, Better Together: Improving Tourism through a Collaborative Approach to Effective Governance, Webinar organised by the Skills, Resilience and Inclusion subgroup of the Together for EU Tourism (T4T) expert group, April 2025.

border management and transport connectivity, contributing to reflections on how mobility policies can support both competitiveness and traveller experience. Finally, the subgroup's work on *Awareness Raising on Education and Training Opportunities Needed for the Twin Transition*[120] helped raise awareness of future skills requirements, reskilling needs and workforce development challenges, supporting the objective of ensuring that the tourism workforce is equipped to accompany the sector's green and digital transformation. Collectively, these activities contributed to the dissemination of good practices, strengthened cooperation between tourism stakeholders and provided practical input to policy discussions.

The **T4T Horizontal Task Force on Unbalanced Tourism** was established to examine the growing challenge of the uneven distribution of tourism flows across destinations and seasons in Europe. With more than 40 T4T experts participating, the final report[121] highlights that unbalanced tourism is not limited to overtourism in a few iconic destinations, but also includes undertourism in less visited regions, creating economic, social and territorial disparities. The report stresses that the concentration of tourism demand is driven by factors such as seasonality, transport connectivity, digital platforms, destination visibility and changing travel patterns, while climate change is increasingly influencing tourism flows. It argues that a more balanced tourism model is essential to preserve residents' quality of life, protect natural and cultural resources, strengthen destination resilience and ensure that tourism benefits are more evenly distributed across the regions within EU. The report's main recommendations focus on a transition from growth based primarily on visitor volumes to a model centred on sustainability, resilience and value creation. It calls for stronger destination management, better use of tourism data and monitoring systems, community involvement in decision-making, spatial and seasonal redistribution of visitors, investment in sustainable mobility and public transport, and the promotion of alternative destinations and tourism products. The report also encourages the deployment of digital tools to manage visitor flows, stronger cooperation between public authorities and tourism stakeholders, and greater use of EU funding instruments to support innovative solutions. A key message of the report is that addressing unbalanced tourism requires coordinated action at local, regional, national and EU levels, ensuring that tourism growth remains compatible with environmental protection, social cohesion and long-term competitiveness.

Technical workshop on Destination Europe branding, 27 January 2026, Brussels

On 27 January 2026, the Commission organised a technical workshop on Destination Europe branding in cooperation with the European Travel Commission (ETC) and supported by external place-branding experts. The workshop brought together around 125 participants from across Europe, including representatives of Member States and enlargement countries, national and regional tourism organisations, international organisations, destinations, digital platforms, academia, private-sector stakeholders and trade associations.

The objective was to explore how a common Destination Europe branding framework could strengthen Europe's global competitiveness while complementing, rather than replacing, national and regional tourism brands. Discussions focused on the strategic purpose of a European tourism brand, its governance, core values, implementation mechanisms and relationship with existing branding initiatives. Participants broadly agreed that the initiative

[120] European Commission, Awareness Raising on Education and Training Opportunities Needed for the Twin Transition, Webinar organised by the Skills, Resilience and Inclusion subgroup of the Together for EU Tourism (T4T) expert group, December 2025.
[121] European Commission, Unbalanced Tourism: Final Report of the T4T Horizontal Task-Force, October 2025.

should be conceived as a long-term strategic framework rather than a marketing campaign or logo, helping to articulate a shared European narrative and strengthen policy coherence across tourism, transport, culture, sustainability and external relations.

The workshop confirmed broad support for developing the Destination Europe framework around shared European values and identified several priorities for future work. The workshop concluded with a series of strategic orientations:

- A Destination Europe brand should provide a common strategic narrative while complementing national and regional brands.
- The brand should be built around shared European values, sustainability, quality, cultural heritage and authentic visitor experiences, rather than a visual identity alone.
- It should support Europe's international competitiveness, promote lesser-known destinations and encourage year-round tourism.
- Governance should be collaborative, involving the European Commission, the European Travel Commission, Member States and other stakeholders.
- Practical implementation should be supported through branding guidelines, toolkits, pilot projects and continued stakeholder engagement.

Urban Agenda for EU Sustainable tourism partnership actions contributing to the strategy priorities

The Sustainable Tourism Partnership was established in December 2022 under the Urban Agenda for the EU[122]. It brings together cities, regions, a national authority, Commission services and other stakeholders to work across governance levels on the sustainable development of urban tourism. The partnership follows the co-creation and co-implementation method of the Urban Agenda, and it contributes to the implementation of the Transition Pathway for Tourism and the European Agenda for Tourism 2030. Members of the Partnership are urban and regional authorities, one national authority, European urban umbrella associations, as well as Commission services, including the Directorate-General for Regional and Urban Policy (DG REGIO), the Directorate-General for Mobility and Transport (DG MOVE) and Joint Research Canter (JRC).

The partnership adopted its Action Plan in November 2024, following an ex-ante assessment, an orientation paper and a public consultation held in mid-2024. Actions are voluntary and create no obligations for member states or cities, in keeping with the supporting nature of the Union's competence for tourism under Article 195 TFEU. Structured around the three objectives of the Urban Agenda, better knowledge, better funding and better regulation, it sets out six actions addressed to local and regional authorities, destination management organisations and tourism businesses, with the aim of helping urban destinations apply existing EU initiatives and exchange good practice.

Three actions address the environmental and climate dimension of urban tourism. The first developed guidelines to help destinations prepare and communicate climate action plans, promote a climate-friendly offer and encourage more sustainable visitor behaviour. It draws on the Glasgow Declaration on Climate Action in Tourism and coordinates with the Horizon Europe Mission on climate-neutral and smart cities. A second action supports the use of sustainability certifications by tourism SMEs, in support of reliable and verifiable

[122] European Commission, Urban Agenda for the EU, Sustainable Tourism Partnership: Action Plan, November 2024.

environmental claims, consistent with the Directive on empowering consumers for the green transition (Directive (EU) 2024/825), which applies from 27 September 2026. A third promotes diversification of the tourism offer as a way to build more resilient destinations and ease pressure on the most heavily visited sites.

The remaining actions address the digital, social and economic dimensions. One develops the digital competences of tourism professionals and of local and regional authorities. Two actions have adopted dedicated handbooks for urban destinations to better foster the diversification of the tourism offer across time, space and activities and improve the accessibility of the destination and tourism services, which include targeted recommendations and good practices. The last sets out approaches to protect local retail as an asset for tourism and to counter the loss of diversity in historic city centres under visitor pressure.

The partnership is finalising the implementation of the actions throughout 2026 and submitted a request to the Commission to continue its work until 30 June 2027, with a focus on capitalisation, dissemination, policy alignment and stronger links with the upcoming EU Strategy for sustainable tourism. The partners published guidelines for climate-friendly and resilient urban destinations in November 2025, and in January 2026 issued a practical handbook on greening tourism SMEs together with a note on financial tools for sustainable tourism SMEs. Through the partnership, cities and regions contribute to the objectives of EU sustainable tourism policy, and the outputs of its Action Plan are available to destinations across the Union.

Technical dialogue with urban destinations under the EU Agenda for Cities on Balanced Tourism Management in EU Destinations and Tourism Policy Lab, 22-23 April 2026, Copenhagen

In preparing the Strategy, the Commission held a first technical dialogue on balanced tourism management and a policy lab with urban destinations in Copenhagen on 22 and 23 April 2026. This was the first pilot of the technical dialogues the Commission is developing with cities under the EU Agenda for Cities, jointly organised with the European Urban Initiative. It feeds the preparation of the Toolbox on balanced tourism management and complements the work of the Urban Agenda for the EU Thematic Partnership on Sustainable Tourism.

The dialogue examined how urban destinations manage visitor pressure while keeping the city liveable for residents. Nine cities set out their experience across three workshops, on managing pressure, sustainable growth, and preserving local identity, followed by an open exchange with peer cities. The policy lab drew on cities experience recognised for their tourism management, among them Tampere, the 2026 European Capital of Smart Tourism, and Dubrovnik, the 2026 European Green Pioneer of Smart Tourism, together with partner cities of the Urban Agenda for the EU Partnership on Sustainable Tourism, destinations from the Commission's "Sustainable EU Tourism, Shaping the Tourism of Tomorrow" project, and cities running tourism-related projects under the European Urban Initiative second call for Innovative Actions. Study visits showed practical measures the host city is using to spread the benefits of tourism to residents and local business.

Example: CopenPay[123]

Copenhagen implements a reward system that has inspired many destinations globally and is being scaled up into DestinationPay[124]. CopenPay is a behavioural "nudging" scheme that encourages tourists to make more responsible choices by rewarding them for positive actions. First launched as a pilot in summer 2024 and expanded in 2025, it has attracted more than 30,000 participants and over 100 local partners, while destinations worldwide have expressed interest in adopting the model. The initiative has contributed to a 59% increase in bike rentals, with 7 in 10 participants reporting that it changed their habits even after returning home, and 98% saying they would recommend CopenPay. It also reflects a wider desire among travellers to leave destinations better than they found them.

As outlined in the report on the dialogue[125], cities converged on expectations to the EU: The first was greater legal certainty at EU level for bold local measures, in particular on short-term rentals and housing, so that cities can act without repeated legal challenge. A resident-first orientation should sit at the core of EU tourism policy, with liveability and wellbeing weighed alongside economic goals, and behavioural change through nudging and communication should count as a complement to regulation and infrastructure. On funding, cities of every size wanted support and capacity-building matched to their circumstances, and several smaller destinations said they feel less well served by current programmes. There was a clear demand for practical tools, both for collecting and using data and for multilevel governance, including guidance on carrying capacity and thresholds for balanced tourism. Cities also pressed for stronger support for sustainable transport and for better connectivity to peripheral and rural areas, arguing that efforts to redistribute visitors have limited effect without it. Tourism, in their view, should be handled as a cross-cutting urban issue, integrated with housing, mobility and urban planning. A few made more specific requests for interoperable EU systems to support cross-border enforcement, for example access to vehicle registration data to help them manage low-emission zones and access restrictions for non-resident European drivers.

These messages inform work under the Strategy and confirm the consistent resident-first and liveability focus. Some concerns reach beyond tourism policy, for instance legal certainty for local measures on short-term rentals. Addressing these challenges requires cooperation across policy areas. In this context, the Commission supports cities *through a* pool of knowledge and good practice*s across* multiple policy areas and topics, including on environmen*tal protection,* resource efficiency, climate change*,* risk prevention *and the* low-carbon economy[126].

European Tourism Day, 26 January 2026.

The European Tourism Day is a recurring conference for the wider stakeholder community to trace and debate trends, challenges and common approaches. The latest ETD took place in Brussels on 26 January 2026[127]. The event gathered a wide range of stakeholders, including CEOs, policymakers, city representatives, investors, and innovators - illustrating the breadth and complexity of the tourism ecosystem. Their presence underscored tourism's importance not only as a source of economic activity but also as a strategic sector supporting regional development, cultural exchange, and Europe's global competitiveness. Discussions throughout

[123] Wonderful Copenhagen, CopenPay: About CopenPay, Accessed November 2026.
[124] Wonderful Copenhagen, DestinationPay, accessed November 2026.
[125] European Urban Initiative, Report of the Technical Dialogue on Balanced Tourism Management, September 2026.
[126] European Commission, Cities Portal, Directorate-General for Regional and Urban Policy, accessed November 2026.
[127] European Commission, European Tourism Day 2026: Recording Available, January 2026.

the day reflected both the sector's current dynamism and the shared commitment to ensuring that its growth remains sustainable and resilient.

The opening session stressed European tourism's renewed strength. A central theme of the event was the rapid digital transformation of tourism. AI is increasingly influencing how travellers search for inspiration, plan their journeys, and interact with services, and industry leaders highlighted its capacity to support more personalised and efficient customer experiences. At the same time, participants stressed that AI is only as effective as the data behind it - making investment in digitalisation and high-quality, interoperable data essential if Europe is to harness the full potential of these technologies. Mobility and accessibility were also prominent topics, reflecting the need for a more seamless and sustainable transport system across the continent. Speakers noted the importance of multimodal travel options, integrated booking systems, and modern transport infrastructure, all of which will play a crucial role in reducing environmental impact and improving the overall visitor experience. These priorities align with upcoming EU initiatives on passenger rights and multimodal ticketing.

Beyond digital and mobility considerations, the event also explored deeper questions regarding tourism's identity and its role within European societies. More destinations are adopting long-term, mission-driven approaches, including regenerative tourism models that focus not only on minimising negative impact but also on creating positive outcomes for communities, heritage, and the environment. This approach invites both policymakers and industry actors to rethink traditional growth measures and put greater emphasis on cultural resilience, regional balance, and meaningful engagement with local communities.

The discussions at the European Tourism Day 2026 showed the sector at an important turning point. Its strong performance provides a solid foundation, but its future success depends on coordinated action, continued innovation, and responsible governance. The future of tourism in Europe is not simply about recovery or growth - it is about redefining what it means to travel, to welcome, and to belong. Over the course of the event, speakers, city leaders, creators, and policymakers collectively painted a picture of a tourism landscape in transformation, underscored the shared responsibility of destinations, institutions, and travellers in shaping a future where tourism supports both people and place and where storytelling, identity, resilience, and responsibility form the new foundations of Europe's appeal.

Central to this reframing is the idea of rebalancing demand. Europe must guide interest across seasons, regions, and types of experiences, not by discouraging travel but through intelligent redirection - sharing alternatives, adjusting timing, and using technology to help visitors find places that match their interests without overwhelming local communities. The goal is not to attract more visitors at any cost, but to attract the right visitors: those who value the cultural richness, environmental sensitivity, and social context of the places they explore. This perspective calls for cooperation, innovation, and a renewed understanding of what tourism represents in Europe and for it.

2.3 EU institutional policy positions and evidence

During the preparation of the Strategy, the European Parliament, the Council of the European Union, the European Economic and Social Committee (EESC) and the European Committee of the Regions (CoR) each adopted policy positions relating to the future of EU tourism policy. These were complemented by evidence as presented in the Commission's three-year report on

the Agenda for Tourism 2030.[128] Although differing in legal nature and institutional role, these policy positions demonstrate a broad convergence around the need for a more strategic, coordinated and sustainable European approach to tourism. Taken together, they provide an important political mandate for the Strategy and identify recurring priorities, including sustainability, competitiveness, destination management, connectivity, skills, governance and resilience.

Theme	EP	Council	CoR	EESC
Competitiveness	✓	✓	✓	✓
Sustainability	✓	✓	✓	✓
Destination management	✓	✓	✓	✓
Skills	✓	✓	✓	✓
Connectivity	✓	✓	✓	
Data & AI	✓	✓	✓	✓
Crisis preparedness	✓	✓		
Governance	✓	✓	✓	✓
EU funding and investment	✓		✓	✓

2.3.1 EU institutional policy positions and recommendations

The following section presents policy statements in support of EU tourism policy as taken by EU institutions and bodies since the publication of the Transition Pathway for Tourism in 2022.

European Parliament

The European Parliament adopted its Resolution *Enhancing connectivity, preserving cultural heritage, and driving local excellence in European tourism: destination management and regional tourism growth* on 28 April 2026, on the basis of an own-initiative report by its Committee on Transport and Tourism.[129] The European Parliament identifies connectivity as a prerequisite for sustainable tourism and regional development, and it presses for accessible, affordable and reliable transport and for complementarity between modes. It addresses unbalanced tourism, noting the concentration of visitors in a small number of destinations, and favours redirecting demand towards lesser-known, rural, mountain and remote areas and developing forms of tourism, including cultural, gastronomic, cycling and regenerative tourism, that extend the season. On short-term rentals, Parliament welcomes the Regulation on data collection and sharing for short-term accommodation rental services (Regulation (EU) 2024/1028), applicable from 20 May 2026, while calling on the Commission to bring forward a further framework that would set service standards and allow Member States to cap letting nights or introduce authorisation and zoning schemes, and it calls for a dedicated budget line for tourism in the 2028 to 2034 Multiannual Financial Framework (MFF).

[128] European Commission, Report from the Commission to the Council on the implementation of the European Tourism Agenda 2030, COM°(2025)°763 final.
[129] European Parliament, Resolution of 28 April 2026 on enhancing connectivity, preserving cultural heritage, and driving local excellence in European tourism: destination management and regional tourism growth (2025/2120(INI)).

Council of the European Union

The Council of the European Union adopted the *European Agenda for Tourism 2030* and its multiannual work programme on 1 December 2022[130]. The Agenda established a common framework for cooperation between the Commission and Member States around five priority areas: governance, the green transition, the digital transition, resilience and inclusion, and skills. The Council invited the Commission to follow up on the implementation of priorities and to report back at least every three years. The Commission's first such report was adopted in December 2025 and forms part of the evidence base for this Strategy. The report draws on an independent stock-taking study of the co-implementation of the Transition Pathway for Tourism and the Agenda, carried out between January and October 2025[131]. It assessed the measures that Member States have taken or plan to take by 2030 across the five priority areas of the Agenda: the enabling policy framework and governance, the green transition, the digital transition, resilience and inclusion, and skills and support for the transition. Progress within each area was assessed as significant, moderate or limited, and Member States were grouped as leading, progressing or emerging based on their cumulative performance.

Nearly all Member States have advanced in every priority area, though progress is uneven across states and across priority areas. Research and innovation is one field where activity is well documented, with more than 300 tourism-related projects on sustainability, climate and circularity funded under Horizon 2020 and Horizon Europe by September 2025[132]. The report also sets out where implementation lags, in particular gaps in multi-level governance and inconsistent application of sustainable tourism principles across the Union. The actions in the Agenda are voluntary and apply in accordance with the principle of subsidiarity, consistent with the supporting competence conferred on the Union in the field of tourism under Article 195 TFEU. Building on this first implementation report, the Strategy concentrates the Union's coordinating, funding and data instruments on the areas where progress has been slowest, while the design and delivery of tourism measures remain with Member States and their regional and local authorities.

The Council of the European Union adopted its Conclusions *Building a sustainable and competitive tourism for the future* on 28 May 2026, meeting in the Competitiveness Council configuration under the Cyprus Presidency[133]. The Council calls for the economic, social and environmental dimensions to be integrated across tourism policy, for the sector's environmental footprint to be reduced through resource efficiency, circularity, decarbonisation and the protection of nature and biodiversity, and for tourism to benefit local communities and respect cultural heritage. It supports multi-level governance and cross-sectoral cooperation, together with quality employment and skills development, including upskilling and reskilling. The conclusions also address the pressure of overtourism alongside the under-use of lesser-known destinations, sustainable and multimodal connectivity, a European framework for tourism data with guidance on the use of artificial intelligence, and stronger crisis preparedness in the face of geopolitical tension, climate change and labour shortages. The Council invites the

[130] Council of the European Union, Council conclusions on 'European Agenda for Tourism 2030', document 15441/22, December 2022.
[131] European Commission, Stock-taking study of the co-implementation of Transition pathway for Tourism and EU Agenda 2030: D7 Final Report (prepared by PwC), October 2025.
[132] European Commission, Report from the Commission to the Council on the Implementation of the European Tourism Agenda 2030, document COM°(2025)°763 final, December 2025.
[133] Council of the European Union, Council conclusions on 'Building a Sustainable and Competitive Tourism for the Future', document 9075/26, May 2026.

Commission to report every three years on implementation and to take these priorities into account in preparing the EU Strategy for Sustainable Tourism.

European Economic and Social Committee

The European Economic and Social Committee (EESC) adopted its own-initiative opinion *Tourism in the EU: sustainability as a driver for long-term competitiveness* on 27 February 2025[134]. The Committee calls for the transition to sustainable tourism to be accelerated and for regenerative approaches, which aim to restore and strengthen the natural, social and economic capital of destinations, to be reflected in the Strategy. It recommends that the Strategy be accompanied by dedicated funding and research programmes and by social and training measures and gives particular attention to the upskilling and reskilling of the tourism workforce in sustainability and the circular economy as a means of raising job quality and retaining talent. The Committee also supports measures to promote year-round tourism and to engage consumers through accessible models and economic incentives.

European Committee of the Regions

The European Committee of the Regions (CoR) adopted its opinion *Towards sustainable and resilient tourism in the European Union: Strategy for balanced and adaptive management* on 10 December 2025[135]. The Committee calls for a stronger role for local and regional authorities in shaping, managing and regulating their destinations, and for their institutional, financial and technical capacities to be reinforced, with training for tourism managers. It also calls for tailored approaches and targeted funding for territories with particular geographical characteristics, including islands, mountain areas, rural areas and the outermost regions, and invites the Commission and the Council to translate the Strategy into an action plan with clear resources, timelines and evaluation mechanisms. The Committee also points to the effects of short-term rentals on housing, social cohesion and public services and calls for regulation, monitoring, enforcement of the Union's data-sharing rules and limits on new permits.

[134] European Economic and Social Committee, Opinion on 'Tourism in the EU: Sustainability as a Driver for Long-term Competitiveness', document INT/1059, OJ C/2025/2014, April 2025.
[135] European Committee of the Regions, Opinion on 'Towards Sustainable and Resilient Tourism in the European Union: Strategy for Balanced and Adaptive Management', document CDR-1378-2025, OJ C/2026/761, February 2026.

Chapter 3. The pillars of the Strategy

The Strategy is structured around interconnected pillars, integrating key transport and mobility actions within its competitiveness agenda. Across all of them, the proposed actions fully respect the principles of subsidiarity and complementarity. They are designed to support and complement action at local, regional and national level by both private and public stakeholders. EU-level initiatives focus on areas where coordination, cooperation or common approaches can provide clear added value and help address challenges that cannot be effectively tackled alone.

3.1 A competitive tourism sector

This Staff Working Document complements the Strategy by analysing means to strengthen the sustainable competitiveness of the European tourism ecosystem and its capacity to adapt to structural and technological change. Tourism is a major contributor to the European economy and employment, but its competitiveness is constrained by persistent labour and skills shortages, the fragmented uptake of data and digital technologies, limited innovation capacity, particularly among smaller businesses, and administrative and regulatory complexity.

At the same time, rapid technological change, including the growing use of artificial intelligence, is transforming how tourism businesses operate, how destinations are managed and how travellers search for, plan and experience tourism services. Ensuring that European tourism can benefit from these developments requires stronger skills, better access to and use of data, greater capacity to innovate and an operational environment that allows businesses to invest and grow.

Addressing these challenges requires action across the tourism ecosystem, while building on wider Single Market, skills, digital and simplification policies. Building on the consultation process, this pillar therefore brings together mutually reinforcing actions to strengthen productivity and innovation, support businesses and workers in adapting to change, and improve the overall competitiveness of European tourism.

3.1.1 Skills and quality jobs in tourism

If attracting and retaining skilled talent is a challenge for any sector, it is essential for the tourism ecosystem with its strong focus on labour-intensive services. The scale of the challenge is also reflected in labour-market indicators. In the first quarter of 2026, accommodation and food service activities recorded a job vacancy rate of 3.0% in the EU, compared with 2.1% across the economy as a whole[136]. Labour shortages are compounded by the structure of tourism employment, including comparatively high shares of temporary and part-time employment, and by growing demand for digital, green and social skills. Labour shortages in tourism sectors have different causes across EU Member States, but typically combine genuine seasonal peaks and demographic labour scarcity with geographic mismatches (e.g. islands, coastal and ski resorts), shortages of skilled staff such as cooks/chefs, unattractive working conditions (relatively low pay[137], difficult working hours, limited period of work, limited career paths), high turnover and retention problems, housing constraints in tourist areas, and, in some

[136] Eurostat, 'Euro Area Job Vacancy Rate at 2.3% (EU Rate at 2.1%)', June 2026.
[137] Eurofound, 'Low-paid Jobs: Employment Trends and Impact of Minimum Wage Policies', September 2026.

countries, slow or restrictive migration procedures. There are also risks in the tourism sector, including within Europe, relating to inadequate wages, unsafe working conditions, exploitation, discrimination and harassment. In destinations with pronounced seasonal peaks, employers may also rely on workers recruited from other EU Member States or third countries to meet temporary labour needs.

The Seasonal Workers Directive[138] provides for an EU framework for the swift and lawful temporary admission and employment of third-country nationals in seasonal sectors for a period of four to nine months (depending on the choice of each Member State) to meet seasonal labour demand, while ensuring fair working and living conditions and protecting them against exploitation. 21 out of 25 Member States applying the Directive have designated accommodation, food services and/or tourism and related leisure services as seasonal sectors, for which they allow admission of third-country seasonal workers under the Seasonal Workers Directive. According to Eurostat data, in 2024, 47,203 authorisations for the purpose of seasonal work, i.e. 17% of all issued authorisations, were issued for these sectors. Almost all (98%) of these seasonal work authorisations for hospitality were issued by six Member States, Croatia (15 185; 32%), Italy (12 631; 27%), Bulgaria (7 403; 16%), Greece (4 707; 10%), Austria (3 293, 7%), and France (2 944, 6%) Although the number of third-country nationals admitted under the Directive is increasing[139], Member States are encouraged to use the Directive more actively to address genuine seasonal and geographically concentrated labour shortages, particularly in coastal, island, ski and summer-resort destinations, while simplifying procedures.

Member States could also make better use of intra-EU mobile workers, and third country nationals already legally resident, as well as under-employed workers, alongside third country recruitment. Retention and recruitment could be improved by addressing relatively low pay, irregular and weekend hours, career progression, contract stability, work-life balance and accommodation constraints, which appear to be the causes of labour shortages in several Member States. Among respondents to the consultation for this Strategy, upskilling and reskilling was at the top of priorities for SMEs, Destination Management Organisations (DMOs) and Member States, with citizens also considering it important along with fair and attractive working conditions.

In terms of concrete skills needs for the sector, recent research under the Erasmus+-funded project PANTOUR[140] highlighted gaps in three main areas for the tourism and hospitality sectors: digital, green and social skills. The sector must address current and future skills gaps through upskilling and reskilling, especially in response to technological change, sustainability pressures, labour shortages, demographic change, and increasing cultural diversity in workplaces. Digital skills are universally essential across tourism businesses, while green skills support sustainable tourism practices and social and intercultural skills are increasingly important for diverse teams and customer needs. At the same time, investment in workforce digital skills has remained limited: In 2022, 9.9% of enterprises with at least 10 employees in

[138] European Parliament and Council of the European Union, 'Directive 2014/36/EU on the Conditions of Entry and Stay of Third-country Nationals for the Purpose of Employment as Seasonal Workers', OJ L 94, March 2014.

[139] Eurostat, Authorisations issued for the purpose of seasonal work by economic sector, sex and citizenship, HORECA sector (accommodation and food service activities), 2022–2025 (2025 preliminary results), accessed November 2026.

[140] PANTOUR, 'Research', Next Tourism Generation Skills Alliance, accessed November 2026.

accommodation and food services and travel agency services provided ICT training to their personnel[141].

The PANTOUR project, which concluded work in 2026, developed several new future-oriented occupational profiles intended to help the sector adapt to digital, sustainability and social challenges and remain attractive to workers. The most recurrent skills needs include data analytics, use of digital technologies, digital marketing, problem-solving in digital contexts, sustainability management, environmental compliance, sustainable tourism and supply chains, food waste management, communication, customer orientation, equality and inclusion, cultural intelligence, critical thinking, adaptability, responsible leadership and strategic leadership. Although some occupational profiles may become stand-alone roles in larger organisations, many micro-enterprises are more likely to integrate these responsibilities into existing jobs. Overall, the profiles are designed to meet tourism sector needs up to 2030 and beyond.

As a response to labour and skills gaps across all sectors of the EU jobs market, the EU has launched multiple initiatives, including:

- The EU Pact for Skills and its large-scale skills partnership for tourism[142].
- The Action Plan on labour and skills shortages in the EU[143].
- The Union of Skills to support upskilling, reskilling and recruitment at all levels[144].
- Tools such as the EU Talent Pool and initiatives like Talent Partnerships with certain third countries seek to attract skilled non-EU workers[145]. Tourism is one of the priority sectors under the Talent Partnerships between some EU Member States and Morocco, Egypt and Tunisia, for example. Hiring non-EU seasonal workers working across Member States could be promoted in such a way as to effectively employ and retain third-country talent. See Section 3.4 for more detail.
- The Seasonal and Fair Employment (SaFE) Blueprint[146] for tourism is intended to provide Member States with practical, modular and sector-specific guidance for designing new, or strengthening existing, seasonal labour-mobility schemes in line with the Seasonal Workers Directive. It covers the full mobility cycle, from recruitment through swift admission and worker protection to return, with particular attention to ethical recruitment, decent living and working conditions and the prevention of labour exploitation.
- Skills Portability Act[147] for improving mobility in the Single Market and attracting talent from third countries.

[141] European Commission, 'Transition Pathway for Tourism: Taking Stock of Progress by 2023', Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, September 2024.
[142] European Commission, 'Pact for Skills', accessed November 2026.
[143] European Commission, 'Labour and Skills Shortages in the EU: An Action Plan', COM°(2024)°131 final, March 2024.
[144] European Commission, 'Union of Skills', accessed November 2026.
[145] European Commission, 'EU Talent Pool', Directorate-General for Migration and Home Affairs, June 2026.
[146] Migration Partnership Facility (MPF), Seasonal and Fair Employment Blueprints (SaFE), August 2025 - November 2026, accessed November 2026.
[147] European Commission, Proposal for a Regulation of the European Parliament and of the Council on portability of qualifications and skills and amending Regulation (EU) 2018/1724 ('Skills Portability Act'), COM°(2026)°992 final, 2026/0274 (COD), September 2026.

- Industry-led training programmes can also serve as models for upskilling and reskilling workers[148].

The **EU Pact for Skills strengthens collective action on skills development** by all stakeholders through dedicated (sectoral) skills partnerships. At EU level, large-scale skills partnerships (LSPs) set up a shared engagement model for collective action where major players in industrial ecosystems and value or supply chains, including associations, social partners, relevant public authorities and SMEs, commit to cooperate and invest to provide upskilling and reskilling opportunities for people of working age across industrial ecosystems.

The EU Pact for Skills LSP for tourism began operating in 2022 and has brought together over 100 members under this shared engagement model. Members meet regularly to exchange information, share best practices, and dedicated working groups have recently focused on specific topics such as accessibility, national and regional skills partnerships and the development of a future EU Tourism Academy. The LSP is also supported by the work of an Erasmus+ Alliances for Innovation project (FuTourAlliance)[149] aimed at transforming the European tourism sector through robust, future-focused skills development. The project builds on the legacy of projects like PANTOUR and the Centres of Vocational Excellence (CoVE) project TourX[150] and brings together a broad multi-country partnership of industry, education, and policy actors to deliver a comprehensive upskilling and reskilling agenda. The project addresses digital, green, and inclusive competences, with a strong emphasis on AI, robotics, and new occupational profiles - driven by cutting-edge online micro-courses and work-based learning opportunities. The initiative prioritises workforce resilience, social dialogue, and sustainability in response to sectoral challenges such as staff shortages, digital transition, and environmental imperatives.

Talent needs relate as much to technical and technology skills (such as data analytics, business analytics, green regulatory compliance and financial literacy) as to creative, inter-personal, hospitality, customer service and language skills, as described above.

Examples:

EU Pact for Skills Tourism Large Scale Partnership[151] – The Tourism Large Scale Partnership (LSP) is coordinated by the European Federation of Rural Tourism (Ruraltour) and the European Association of Institutes for Vocational Training (EVBB). It has a dedicated Management Committee, which is composed of representatives of social partners, the teaching and training sector, industry and the public sector. Four thematic working groups focus on the following areas: skills partnerships, cooperation models between the public sector and the tourism industry, special groups and their needs, and training implementation in practice.

Upskilling and reskilling by LSP member **ENAIP Veneto**[152] – In 2025, ENAIP Veneto supported lifelong learning through the provision of both initial training and adult education, including upskilling and reskilling courses across a wide range of sectors. Under the Erasmus+ TourX Centres of Vocational Excellence (CoVE) project, ENAIP Veneto coordinated the

[148] TUI Care Foundation, 'TUI Academy', accessed November 2026.
[149] FUTOUR Alliance, 'FUTOUR Alliance', PACTS4ALL, accessed November 2026.
[150] TOUR-X, 'The CoVE for Hospitality That Caters to Your Skills Needs', accessed November 2026.
[151] European Commission, 'Tourism Ecosystem and Large-Scale Skills Partnerships (LSPs)', Pact for Skills, accessed November 2026.
[152] ENAIP Veneto, 'Organisation', accessed November 2026.

implementation of a train-the-trainers package and contributed to the development of a modular student training pathway delivered through an e-learning platform, which enables young people and adults to gain micro-credentials upon successful completion of each module, supporting flexible and targeted skills development.

Strengthening cooperation on tourism skills Academy

Despite these efforts, the tourism labour market still lacks workers with the right skills to support the sector[153]. European countries have a tradition of excellence in tourism training and education, with an impressive list of established schools and academic curricula. Joining forces and building common approaches in training and recognition at EU level usefully complements action at regional or national level and addresses needs of a cross-border nature.

Building on the assessment of existing data[154], evidence of skills shortages in the EU tourism and hospitality sectors[155], the outcomes of EU-funded projects on skills as referenced below, and the Review of EU Skills Academies, the Strategy proposes establishing an EU Tourism Academy hosted on the existing EU Tourism Platform. To avoid unnecessary duplication of effort, ensure complementarity and allow for rapid rollout, the Academy will rely on a network of existing national tourism institutes, vocational education and training (VET) providers and other relevant stakeholders, who will help shape course content in response to the needs and priorities of the tourism ecosystem. Member States' competence in education, training and tourism shall be fully respected.

The EU Tourism Academy would build on the modern, common training programmes developed through EU-funded projects (PANTOUR[156], relevant Centres of Vocational Excellence (CoVEs) such as Tour-X[157], FuTourAlliance[158], D3Hub[159]), work undertaken within the Pact for Skills Large-Scale Skills partnership for tourism and private initiatives that align with current and future needs of the tourism labour market. Needs-based training content will be collected via these projects, together with experts from academia and industry, as well as providers of vocational education and training (VET), under the umbrella of the EU Tourism Alliance in a dedicated Tourism Academy Working Group. This Working Group will be set up under the EU Tourism Alliance and composed of representatives of the network, including relevant Member States' authorities, industry and EU-funded skills project coordinators. In parallel, a platform connected to the EU Tourism Platform will be developed to host and deliver short training courses to job seekers and people working in tourism and hospitality enterprises. The training will be made widely available and accessible, free or affordable to learners. Modular, stackable courses for personalised learning will be offered in blended delivery formats – the national tourism institutes and vocational training institutes participating in the network may choose to deliver the agreed training content on-site. The aim is also to raise awareness and understanding of the potential of vocational education and training in

[153] European Commission, 'Labour and Skills Shortages in the EU: An Action Plan', document COM°(2024)°131 final, March 2024.
[154] European Commission, 'Labour and Skills Shortages in the EU: An Action Plan', document COM°(2024)°131 final, March 2024.
[155] Eurofound, 'Sustainable Tourism in a Digital Age: Preparing the Tourism Sector for the Twin Transitions', accessed November 2026.
[156] PANTOUR, 'PANTOUR', Next Tourism Generation Alliance, accessed November 2026.
[157] TOUR-X, 'The CoVE for Hospitality That Caters to Your Skills Needs', accessed November 2026.
[158] EfVET, 'FUTOUR Alliance', accessed November 2026.
[159] European Commission, 'D3HUB: Data-Driven Transition in European Tourism', Transition Pathway for Tourism, accessed November 2026.

promoting and supporting the employability of people in the tourism sector, productivity and lifelong learning.

A network of vocational and higher education institutions will be established to support the development of the training material, and to deliver the training courses on-site on a voluntary basis. Ultimately, learners who complete a full training module should have access to a recognised European Digital Credential linked to the EQF and ESCO and validated by the industry, comparable by employers and portable across Member States.

To support a diverse and resilient workforce, training content will systematically embed equality, non-discriminatory and inclusion principles. This includes fair working conditions, workplace diversity and accessibility to enhance career prospects across all tourism subsectors.

Strengthening the tourism skills base is therefore relevant across an ecosystem employing more than 20 million people, including 13.4 million people in the core tourism industries. The EU Tourism Academy will in particular support workers, job seekers, tourism SMEs and education and training providers in responding to changing skills needs.

Fair and attractive working conditions

Despite the strong recovery of European tourism after the COVID-19 pandemic, persistent skills gaps and labour shortages – particularly in hospitality, with an estimated 10% of jobs unfilled – continue to undermine the sector's competitiveness across several EU Member States and regions. Tourism with its specific needs is a challenging workplace, not least due to seasonality and service requirements. But it is also a sector promising a wide variety of careers, creativity, independence and personal development. Tourism offers fulfilling jobs in "places where others go for holidays".

In 2023, the Commission launched an EU-wide awareness-raising campaign on tourism jobs and skills, with material available in all EU languages, to help address labour and skills shortages during the summer and winter seasons[160]. The campaign generated millions of online impressions and resulted in high engagement by tourism stakeholders, particularly during the summer season.

Acknowledging evident differences, tourism and transport jobs show many similarities, including the service nature, cross-border aspects, mix of technical and personal skills, as well as a mix of educational levels. The tourism sector is characterised[161] by a high concentration of small and microbusinesses, high levels of seasonality, low qualification levels, a high level of part-time work and a high share of migrant workers. It demands considerable flexibility regarding shift patterns, and workers can experience stress related to the high levels of consumer demand, particularly during peak season, and from some physically demanding tasks. Against this background, the Commission launched in 2026 a study to assess working conditions in transport and tourism.

[160] European Commission, 'Jobs and Skills in Tourism', Directorate-General for Mobility and Transport, accessed November 2026.
[161] Eurofound, Rodríguez Contreras, R., Weber, T. and Adăscăliței, D., Sustainable tourism in a digital age – Preparing the tourism sector for the twin transitions, Publications Office of the European Union, December 2025.

In addition, the Fair Labour Mobility package adopted on 15 September 2026 is designed to improve the mobility of workers within the Union by addressing administrative, legal, and social security challenges. Its main goals are to simplify procedures, enhance enforcement, and ensure fair working conditions for mobile and posted workers, including third-country nationals, while supporting businesses and public authorities in compliance. The Skills Portability initiative (SPI), as part of this package, will facilitate the portability of qualifications and skills between Member States, including for tourism qualifications and skills. The SPI implements a coordinated approach with regard to digitalisation and the use of wallets, required to ensure interoperability and reduce barriers for workers to transmit and/or for employers to receive and read a digital qualification.

3.1.2 A data-driven sector

Mario Draghi's Report on European Competitiveness[162] calls for a new growth model built on knowledge and innovation; one that translates Europe's structural strengths into globally competitive industries. For tourism to successfully sustain its structural strength, data, reliable statistics, and technology need to be fully integrated into decision-making and daily operations of public authorities at all levels and private stakeholders, notably destinations and SMEs.

In the targeted and open public consultations, respondents consistently prioritised technology and data. This includes enhanced data access, sharing and management; personalised and AI-driven experiences; and smart destination concepts and Internet of Things integration. A strong signal of support for EU action on digitalisation, AI and the European tourism data space.

While the uptake of advanced digital technologies among tourism SMEs is increasing, it also remains uneven. According to the European Monitor of Industrial Ecosystems, 37% of surveyed tourism SMEs used cloud technologies in 2024, up from 25% two years earlier, while 23% had adopted artificial intelligence, up from 8%. By contrast, the use of big data remained more limited, at 11.5%[163].

The volume and variety of tourism data are also expanding rapidly as tourism becomes increasingly digitalised. In 2025 alone, 951.6 million guest nights in the EU were booked in short-stay accommodation through Airbnb, Booking and Expedia, an increase of 11.4% compared with 2024[164]. At the same time, relevant tourism data remain dispersed across public authorities, businesses and digital platforms, while differences in granularity, timeliness, accessibility and interoperability limit their combined use for destination management and business decision-making[165].

All tourism specific work strands rely on the EU's regulatory digital policy framework including, but not exclusively, the Digital Markets Act (DMA)[166], the Digital Services Act

[162] European Commission, The Future of European Competitiveness: A Competitiveness Strategy for Europe, Mario Draghi, September 2024.
[163] European Commission, 'Report on the Implementation of the European Tourism Agenda 2030', document COM(2025) 763 final, December 2025; European Commission, European Innovation Council and SMEs Executive Agency, Technopolis Group, Izsak, K., Markianidou, P., Marinelli, E. et al., 'Monitoring Industrial Ecosystems – Tourism – Analytical Report – 2024 Edition', Publications Office of the European Union, May 2025.
[164] Eurostat, 'Tourism Nights Booked via Platforms Hit Nearly 1 Billion', April 2026.
[165] OECD, 'Using Alternative Data Sources and Tools to Measure and Monitor Tourism', OECD Tourism Papers, No. 2025/11, OECD Publishing, Paris, June 2025.
[166] European Commission, 'The Digital Markets Act (DMA)', accessed November 2026.

(DSA)[167], General Data Protection Regulation (GDPR)[168], the Data Act[169] and the AI Act[170], as well as the EU Digital Identity environment[171]. EU data and AI rules play an important role in building the Common European Tourism Data Space (see below) and supporting innovation in destinations and businesses, and the EU Model for Tourism Management (see below). The DMA and DSA are particularly important for the broader tourism business environment, while EU Digital Identity Wallets will support persons and businesses along the travel chain.

The DMA is designed to comprehensively address and regulate the power of the largest digital companies designated as gatekeepers. The promotion of fair competition, transparency and innovation in the online search sector is one of the key enforcement priorities of the DMA. The European tourism ecosystem is heavily impacted by digitalisation and is reliant on online search engines. The DMA contributes to allowing European tourist operators to increase their visibility, optimise their distribution channels and engage with their customers more effectively. For instance, the DMA imposes on online search engines, among others, the obligation to apply fair, reasonable and non-discriminatory conditions of access and prohibits gatekeepers from treating its own products and services more favourably in ranking than similar products and services offered by third parties. The DMA also has a provision that bans the use of parity clauses. This ensures that tourist operators, like hotels, have regained pricing freedom outside of the platforms of the gatekeepers.

The Digital Services Act (DSA) strengthens tourism by making online travel and accommodation platforms safer, fairer, and more transparent for EU users. Travellers booking through platforms benefit from clearer information on pricing, fees, cancellation policies, and terms and conditions, as well as more transparent advertising that is properly labelled and explains who placed it and why, while exploitative targeting based on protected data or aimed at minors is banned outright. Very Large Online Platforms face extra safeguards, including yearly risk assessments, mitigation and crisis-response measures, and public ad repositories, and the European Commission actively enforces compliance. The DSA also gives travellers stronger recourse over content disputes, such as inaccurate or unfair reviews: they can use a platform's free internal complaint system (Article 20), turn to certified out-of-court dispute resolution bodies (Article 21), flag illegal content through the notice-and-action mechanism (Article 16), and ultimately complain to their national Digital Services Coordinator. Together, these measures build greater trust in online booking, giving travellers more confidence, protection, and accountability throughout their journey.

A common European Tourism Data Space

Data – access, sharing and use – is a core success factor for tourism in Europe, for smart and pro-active management capabilities as well as for the ability to react to market needs, trends and crises. A functioning and trusted data environment is also a major condition for active and effective application of AI tourism. The comprehensive deployment of a jointly overseen common data space is therefore essential and a matter of urgency for EU Member States,

[167] European Commission, 'The Digital Services Act', accessed November 2026.
[168] Regulation (EU) 2016/679 on the Protection of Natural Persons with Regard to the Processing of Personal Data and on the Free Movement of Such Data (General Data Protection Regulation)', Official Journal of the European Union, May 2016.
[169] European Commission, 'The Data Act', accessed November 2026.
[170] European Commission, 'AI Act', accessed November 2026.
[171] European Commission, 'EU Digital Identity Wallet', accessed November 2026.

regions and the private sector; any delay or insufficient levels of commitment would significantly weaken European tourism, its businesses, workforce and destinations.

As set out in the 2023 Communication of the European Commission *Towards a Common European Tourism Data Space: boosting data sharing and innovation across the tourism ecosystem*[172], the Tourism Data Space will provide the essential framework for sharing high-quality, interoperable and timely data, with the goal of supporting tourism businesses and DMOs, and ultimately providing better information and services for travellers. The objective of the Data Space is to combine technical standards for interoperability with a governance structure which invites and allows public and private stakeholders to join efforts to increase data sharing across data domains, as well as across sectoral data spaces, and data use in the sector, so as to address three inter-related challenges for tourism across the EU data interoperability, access to data, and the provision of data by public and private stakeholders, which may need to be incentivised. Work on the Tourism Data Space is fully aligned with relevant legislation, including the Data Act and the Interoperability Act[173], GDPR and is integrated into the broader cooperation framework for EU data spaces run by the Commission's Data Space Support Centre[174].

The foundations of the EU Tourism Data Space are already there, with progress already made with the DEPLOYTOUR[175] project and the work carried out by D3Hub[176] supporting DMOs in data management and digitalisation. Now it is essential to increase uptake and participation for full deployment.

The use of artificial intelligence in the tourism ecosystem

Artificial intelligence (AI) is playing a pivotal role in reshaping Europe's tourism ecosystem, impacting virtually every aspect of the sector and the travelling and tourism experience[177].

Real-time analytics and predictive modelling can support the management of visitor flows, reduce pressure on overcrowded sites, and actively promote Europe's rich diversity of lesser-known destinations. It helps in protecting cultural and natural heritage and improving the overall quality of the tourism experience. Advanced tools such as digital twins and simulation models can further help destinations anticipate demand, test visit scenarios, optimise mobility and infrastructure, and manage resources more sustainably. Once tourism content, services, and offers are digitised, AI can integrate data from multiple sources into interoperable platforms, allowing public authorities and stakeholders to take informed, holistic decisions, aligning sustainability objectives with other planning priorities such as crisis preparedness and resilience. Their use in public decision-making should take account of data quality,

[172] European Commission, Towards a Common European Tourism Data Space: Boosting Data Sharing and Innovation Across the Tourism Ecosystem, COM°(2023)°726, July 2023.
[173] Regulation (EU) 2024/903 of the European Parliament and of the Council of 13 March 2024 laying down measures for a high level of public sector interoperability across the Union (Interoperable Europe Act), March 2024.
[174] European Commission, Data Spaces Support Centre, European Digital Innovation Hubs Network, accessed November 2026.
[175] DEPLOYTOUR, Deployment of the European Tourism Data Space, European Digital Europe Programme, October 2024.
[176] D3HUB Competence Centre, Data-Driven Destinations Hub, accessed November 2026.
[177] OECD, Artificial Intelligence and Tourism: G7/OECD Policy Paper, OECD Tourism Papers, No. 2024/02, December 2024; G7 Tourism Ministers, G7 Tourism Ministers' Communiqué, Florence, November 2024.

transparency, potential bias and accountability, in line with the applicable EU regulatory framework.

Beyond destination management, AI drives personalised travel choices: AI tools such as recommender systems, conversational assistants and translation services or agents can help travellers discover, plan and navigate Europe's destinations more easily. At the same time, AI can support more complete travel planning, including itinerary changes and better matching of offers to travellers' needs. AI has great potential to support and encourage the search and booking of responsible travelling options. However, AI-powered recommendations may also reinforce existing travel patterns and the concentration of visitors in already popular destinations[178]. This requires destinations and businesses to pro-actively address questions of AI and social media positioning.

For smaller tourism businesses in particular, access to appropriate AI tools and skills can help reduce the technological gap with larger operators, improve visibility in AI-mediated travel search and support more efficient business operations. Destinations can benefit from improved forecasting, visitor-flow management and resource planning, while travellers can benefit from more personalised and accessible information and services[179]. The EU Tourism Academy will also help tourism businesses and workers develop the digital and AI-related skills needed to benefit from these technologies.

However, the growing use of AI in tourism also brings risks that need to be addressed to ensure consumer trust and fair competition[180].

In line with the EU Apply AI Strategy and its AI First principle, this Strategy views AI not merely as a technological development, but as a strategic opportunity to strengthen the digital authority of destinations and EU businesses, making sure that Europe retains control over its data, narratives, and value creation in the tourism sector. This priority is supported by horizontal EU data and digital legislation, including the General Data Protection Regulation, Data Act, the AI Act, the Digital Services Act and recent proposals for a Data Omnibus and for a Cloud and AI Development Act (CADA). Close cooperation with international partners, including the OECD, will be beneficial in identifying, testing and developing AI use cases.The Commission is working with stakeholders on fully embedding tourism into the EU Apply AI strategy, to identify AI use cases and build a best practice framework for responsible and safe uptake of AI in tourism.

Example – The EU Digital Identity Wallets and the European Business Wallets[181] as necessary trust framework for agentic AI in tourism

AI is rapidly transforming how Europe travels. AI agents will no longer simply compare options: they will plan and book entire journeys for travellers, and manage pricing and

[178] Andreev, H., Kosmas, P., Livieratos, A. D., Theocharous, A., and Zopiatis, A., Destination (Un)Known: Auditing Bias and Fairness in LLM-Based Travel Recommendations, AI, Vol. 6, No. 9, 2025, Article 236, accessed November 2026.
[179] OECD, Artificial Intelligence and Tourism: G7/OECD Policy Paper, OECD Tourism Papers, No. 2024/02, December 2024; G7 Tourism Ministers, G7 Tourism Ministers' Communiqué, Florence, November 2024.
[180] UNESCO, Recommendation on the Ethics of Artificial Intelligence, November 2021.
[181] European Commission, European Digital Identity, accessed November 2026.

customer requests for businesses. However, agentic travel can only become a reality within a secure trust framework for identifying and authorising AI agents.

A traveller could ask an agent to organise a weekend in the mountains, booking public transport and bike rental across borders. With the traveller's consent, the agent would present the relevant credentials from their Wallet at each step, from buying tickets to checking in at the hotel. Because agents deal as easily with small businesses as with large platforms, local providers become more visible, spreading visitors and their spending beyond the usual hotspots. Making multimodal travel as easy as taking the car is also a strong incentive towards more sustainable tourism.

Businesses can rely on AI agents authorised through their European Business Wallets, making it clear which company each agent represents and what it is allowed to do. The result is faster service and lower costs for businesses, and a seamless journey from booking to arrival for travellers.

The Commission supports pilots, involving public and private organisations, to test the integration of agentic AI in the Wallets through selected real-life use cases, building on the existing European trust infrastructure. This gives Europe an opportunity to strengthen its competitive advantage in its world-leading tourism sector, assuring visitors from within the EU and beyond that Europe is a destination of trust and safety.

The Commission explores opening training opportunities to the tourism sector, made available by the European AI Innovation ecosystem[182], including the European Digital Innovation Hubs, and create links between the AI Skills Academy and the EU Tourism Academy, to explore complementarities and seek synergies.

Tourism statistics

Eurostat, in close cooperation with the national statistical authorities, provides data on tourism. Regulation 692/2011 concerning European official statistics on tourism laid down the core requirements, consisting of two main components:

- data on tourist accommodation, namely capacity and occupancy of tourist accommodation establishments (for example number of bed places, number of nights spent). Based on data exchange agreement with major international platforms, Eurostat also publishes a separate series on short-stay accommodation offered via online platforms;
- data on tourism trips made by EU residents, including information on destination, duration, accommodation, transport, expenditure, etc. and data on participation in tourism.

The European official statistics on tourism give the user harmonised, comparable and regularly updated data, often available at subnational level, that respects international recommendations

[182] European Commission, Ecosystem for AI Innovation in Europe, Shaping Europe's Digital Future, accessed November 2026.

and guidelines. More information, including an overview of publications, can be found on the "tourism statistics" section of Eurostat's website[183].

Quality statistics are essential for tourism policy making and data management. Since the entry into force of the Regulation 692/2011 on Tourism Statistics, the tourism sector and user needs for statistical information changed very significantly (new business models like accommodation platforms, unexpected external shocks, the impact of tourism industries on the environment and on societies), while in parallel the statistical world also evolved towards more efficient production systems, embracing the possibilities offered by new technologies and by the digitalisation of industries.

As outlined in the Strategy, a proposal to amend Regulation (EU) 692/2011 is therefore planned for 2027, with the aim to make European official statistics on tourism fit for the future by better addressing newly arising user needs and by better integrating new data sources and methods in the statistical production process. The initiative aims to produce -without increasing the net burden put on respondents- more complete, more punctual and more cost-efficient statistics on tourism, including the economic assessment of tourism, and its sustainability. In particular, it will aim to provide public and private actors with more complete, granular, punctual and cost-efficient European official statistics on tourism, including alignment with international standards, better collection of transport-mode choice and seasonal origin-destination flows, progress on economic and sustainability data, and reducing administrative burden for businesses. Alternative sources will be explored, such as privately held data, from companies holding relevant data within or outside the tourism sector, or administrative data from public authorities. The implementation of Regulation (EU) 2024/1028 on data collection and sharing relating to short-term accommodation rental services help making more data available on an important local issue.

Developing the EU Tourism Dashboard

The European tourism sector faces mounting pressures to become more competitive, digitally enabled and sustainably managed. While the EU Tourism Dashboard already offers a valuable visual overview of a wide range of indicators, policy makers increasingly need a dedicated, forward-looking instrument that can translate these data into actionable insights, identify emerging trends and support the development of evidence-based measures across the Union. A stronger, data-driven monitoring framework is therefore essential to underpin the Strategy's ambition of a resilient, competitive and environmentally responsible tourism ecosystem.

Building on the existing EU Tourism Dashboard's infrastructure and extending its analytical scope, the EU Tourism Observatory will provide regular monitoring of headline sustainability indicators – covering the economic importance of tourism as well as its social and environmental dimensions – and deliver periodic syntheses of sector-wide trends at EU, national and regional levels. It may also produce targeted analytical briefs on topics of emerging policy relevance and pursue research and development activities to integrate new data sources and methodological advances, including to exploit the potential of the European Tourism Data Space.

The Observatory will gradually enrich its functionality with interactive visualisations and repository of analyses and briefs. By doing so, it will transform a descriptive data platform into

[183] Eurostat, Tourism Statistics: Publications, accessed November 2026.

a more proactive knowledge hub, capable of delivering timely, evidence-based guidance to support the EU's transition towards a more competitive, digital and sustainable tourism sector.

Supporting technological innovation and travel tech startups

Alongside efforts to streamline regulatory frameworks, it is essential to reinforce the innovation pipeline so that tourism businesses can fully benefit from a more coherent Single Market environment. The tourism ecosystem, dominated by SMEs and micro-enterprises, remains structurally weak in R&D intensity, digital skills and absorptive capacity. This limits its ability to develop and adopt emerging technologies and fully exploit data-driven opportunities. Travel-tech startups can act as catalysts in addressing these gaps by developing scalable solutions for visitor experience, mobility, sustainability and operational efficiency, but they face persistent barriers related to early-stage finance, skills, market access and real-world validation. Incubators and accelerators can bridge this gap by providing targeted mentoring, access to sector-specific data, testbeds and pilot environments, and connections to investors, destinations and established industry players.

A 2026 OECD paper, undertaken at the request of the European Commission to inform the Strategy, mapped around 70 tourism incubators and accelerators across OECD countries and EU Member States. It found a diverse and growing support landscape, with programmes operating at European, national and local levels and often focusing on digitalisation and sustainability. However, most initiatives concentrate on short-term, early-stage support, such as competitions, bootcamps and innovation challenges, while fewer offer sustained assistance to help startups develop and scale up their solutions. The paper also highlights fragmented support structures, limited opportunities for scaling up, and the need for stronger links between startups, established tourism businesses and investors. It recommends better coordination between programmes, more continuous support pathways and improved monitoring of their results[184].

EU support for synergies among travel-tech incubators and accelerators can reduce fragmentation across national ecosystems, facilitate cross-border scaling of innovative market-ready solutions, and ensure that investments in European data infrastructures and data spaces generate tangible economic value for the wider tourism ecosystem.

European Digital Innovation Hubs (EDIHs)[185] provide local innovation support for companies of all size and targeted to local needs and particularities. Tourism is already one of the economic sectors addressed by some of the EDIHs. the Commission will explore options to develop tourism relevant operational connections across the network of EDIHs and with interested partners of the wider ecosystem. Connecting the Common European Tourism Data Space to tourism focused EDIHs as a gateway to destinations and (M)SMEs will be a particular priority.

European Digital Identity Wallets (EUDI Wallets) will be deployed across the European Union by December 2026 and will contribute to a more integrated European tourism. The EUDI Wallets can be used across the travel journey, for example when booking flights, renting a car, checking in at hotels, using different means of transport, or accessing museums and other attractions where identity, eligibility, or ticket verification is required. They will allow users to

[184] OECD, Using Incubators and Accelerators to Support Travel and Tourism Start-ups, OECD Tourism Papers, No. 2026/01, August 2026.
[185] European Commission, European Digital Innovation Hubs, accessed November 2026.

store and present a wide range of digital documents relevant to travel, including driving licences, vehicle registration and insurance documents, tickets and boarding passes, as well as disability cards, the new European Disability Card and the European Parking Card for Persons with disabilities, student and senior cards for access to assistance and discounts, all within a trusted and interoperable European framework. The Wallets will also enable the secure exchange of person identification data, allowing users to authenticate themselves and share only the information necessary for a specific transaction through selective disclosure. In addition, users will be able to sign documents using qualified electronic signatures, enabling secure digital completion of contracts, bookings and other transactions with full legal effect. By simplifying access to tourism services, strengthening trust in digital interactions and reducing administrative burdens for both travellers and service providers, the European Digital Identity Wallets will enhance the travel experience and support the digital transformation and competitiveness of the European tourism sector. In close interaction with the Common European Tourism Data Space and innovation support (in particular via EDIHs), European Digital Identity Wallets will support data use across the whole tourism ecosystem. The Wallets are expected to be important operational elements in the toolbox provided by the future EU Model for Tourism Management.

The Commission will continue its cooperation with international partners, notably the OECD, on innovation, AI and data-driven tourism, including through the exchange of good practices and analytical work to support the digital transformation of the sector. To support travel tech start-ups, the Commission will explore ways to strengthen synergies between incubators, accelerators and established tourism actors to maximise the support available to start ups, for example through matchmaking events.

Examples – successful tourism and traveltech approaches

France Tourisme Tech[186] – In 2023, France set up a national programme called France Tourisme Tech run by the Direction Générale des Entreprises (DGE). It backs travel tech start-ups through mentoring, open-innovation projects with established operators, public-procurement training and exposure at trade events. By 2026, three cohorts of start-ups had passed through it, covering 35 companies working on sustainable tourism, accessibility, visitor-flow management and data analytics; as of 2026, the DGE reported more than 55 pilots with industry partners, ten of them industrialised and several projects implemented across the EU. This initiative also provides a Manifesto for a European Travel Tech ecosystem supported by Spain, Greece, Austria, Czechia and Hungary, advocating for siloed thinking to be overcome and calling for a repository of the most promising technological solutions in the tourism sector. The Manifesto also calls for a European Travel Tech network linking national incubators, accelerators, clusters and public authorities, together with a dedicated European support programme modelled on France Tourisme Tech, so that promising firms can scale across the single market.

Crowd in Motion, Austria[187] **-** Crowd in Motion is a European Digital Innovation Hub (EDIH), part of the EU network co-funded under the Digital Europe Programme and coordinated by Salzburg Research. It brings together research institutes, universities, innovation accelerators, crowd-platform providers and digital fabrication labs running a one-stop shop to help tourism, mobility, sports, wellbeing and public-sector organisations adopt AI,

[186] Direction Générale des Entreprises, France Tourisme Tech, accessed November 2026.
[187] Crowd in Motion, European Digital Innovation Hub for Tourism, Sports and Leisure, accessed November 2026.

the Internet of Things and crowd technology. Support spans from early analysis through prototyping and field trials to funding advice, with help on digital maturity, skills and building local innovation networks.

Public Eye - Municipality of Amsterdam, the Netherlands[188] **–** Amsterdam's Chief Technology Office built the crowd-monitoring system Public Eye, an open-source computer-vision system that counts how many people are in a public space and how densely they are packed and which way they are moving, and forecasts crowding before it builds. It is privacy-by-design. Camera feeds are converted instantly into anonymous counts and heatmaps, no images are kept beyond a small set of training frames on an encrypted municipal network, and the system is listed on the city's public AI Register. The aim is to keep busy areas safe and to inform residents and visitors through digital signs and a public busyness dashboard, not to identify people or issue fines. Amsterdam developed it with LIFE Electronic and Tapp after no commercial product at that time could cover a wide area while meeting its privacy standards, then released it as open source for other cities. The project ran from 2019 to 2021.

CityFlows – European Institute of Innovation and Technology (EIT) Urban Mobility project[189] – The same approach has been tested elsewhere in Europe: the EIT Urban Mobility project CityFlows ran living labs in Amsterdam, Milan and Barcelona and spun off a crowd-analytics company, City Analytics. The objective of CityFlows focused on the liveability of crowded pedestrian spaces through provision of decision-support for the management of pedestrian flows. Large pilots organized in the City of Amsterdam (ArenA Boulevard & COVID-19 living lab), Milan (Milano Centrale) and Barcelona (Parc Guell), featured state-of-the-art crowd monitoring systems and analysis techniques. CityFlows also focusedon creating an active and involved user-base for CM-DSSs through the education of city officials, security officers and crowd management organisations regarding the benefits of this type of decision-support system in the process.

3.1.3 Simplification of the tourism operational environment

Tourism can only flourish through a business-friendly environment, in line with the Commission's objective to simplify rules, reduce fragmentation and make the Single Market work better, as outlined in the Omnibus IV Simplification Package[190]. The core vision of the Strategy is to overcome silos across sectors, policies and stakeholders in order to strengthen innovation and competitiveness, unlock investment and allow small businesses to successfully manage the green and digital transitions.

While there is currently no comprehensive EU-wide quantification of the cumulative administrative and regulatory burden borne specifically by tourism businesses, the issue has emerged consistently in stakeholder consultations and international policy work[191]. This evidence gap also reinforces the case for systematically identifying and assessing recurrent barriers affecting tourism operators across the Single Market.

The consultation results show strong support for EU action to support SMEs and startups, including to address administrative burden and complexity in accessing finance. The 2026

[188] Gemeente Amsterdam, Public Eye, Dutch Algorithm Register, accessed November 2026.
[189] EIT Urban Mobility, CityFlows – Second Year, accessed November 2026.
[190] European Commission, Omnibus IV Simplification Package, May 2025.
[191] OECD, OECD Tourism Trends and Policies 2026, Chapter 2, section "Improving the Enabling Environment for Tourism Businesses", pp. 45–48, OECD Publishing, Paris, July 2026.

Council conclusions on tourism also reflect the need for simplification and administrative burden reduction. Simpler and clearer rules benefit the entire tourism ecosystem: companies as much as public authorities, travellers and tourism workers.

A great variety of rules applicable to tourism are enacted at national, regional or local levels. Additionally, EU legislation also affects the sector, including sustainability-related regulations adopted under the Green Deal, rules on package travel, passenger rights and digitalisation, amongst others. To help identify, analyse, and where possible overcome, administrative and operational burdens encountered by tourism actors, it is helpful to maintain communication channels across levels of governance and between the private and public sectors. Such exchanges allow for establishing the sources of burden encountered and help testing remedial action. For EU level regulation such sectoral intelligence can usefully inform the broader simplification effort. The Commission will facilitate such communication through a dedicated **EU Simplification Initiative for tourism** involving Member States and tourism stakeholders, in coordination with the existing simplification platform.

Example: Allergen information in restaurants

Authorities from an EU Member State informed the Commission of concerns raised by public and private entities that the EU Regulation on informing customers about allergens in food was causing considerable burden in the daily practice of small hospitality establishments. The claim was that a written record on allergens was always required, making it more difficult to offer frequently changing menus based on fresh local produce.

Following an informal assessment of applicable EU legislation and consultation with relevant experts, it was evident that EU law did not require allergen information to be provided exclusively in writing[192]. While information on allergens must be available to consumers, Member States may allow it to be provided orally, subject to national rules[193]. The perceived burden therefore resulted from the interpretation or implementation of the legislation rather than from the EU rules themselves.

VAT rules applying to the travel and tourism ecosystem

The tourism ecosystem as one of the largest service industries in the EU generates about EUR 55 billion of value added tax revenue, or roughly 6% of total EU value added tax revenue. This results from about EUR 21 billion from supplies covered by the Tour Operator Margin Scheme (TOMS) and about EUR 34 billion from supplies via disclosed agents[194]. These correspond to respectively 2.3% and 3.7% of collected EU value added tax. Passenger transport is also a major part of the European economy and Single Market, accounting in 2023 for turnover of EUR 354 billion and for 2.1% of EU GDP, as well as employing over 2.5 million people.

Most of the VAT rules applicable to the travel and tourism sector are outdated and do not reflect wider developments such as growth in international travel and intra-EU passenger mobility, digitisation, and increased global competition. Moreover, such rules are interpreted or applied

[192] European Parliament and Council of the European Union, Regulation (EU) No 1169/2011 on the Provision of Food Information to Consumers, October 2011.
[193] European Commission, Commission Notice on the Provision of Information on Substances or Products Causing Allergies or Intolerances, July 2017.
[194] Data based on confidential data provided by Member State tax authorities, in addition to Eurostat national supply, use and input-output tables.

inconsistently by Member States, which runs the risk to distort competition within the internal market and as the rules stand, they also affect competitiveness of EU businesses vis-a vis third countries.

The current, outdated framework gives rise to structural distortions, in particular for B2B suppliers. Hidden non-deductible VAT for business customers renders the VAT non-neutral across various business models. Undefined terminology within the legal framework and fragmented case law of the Court of Justice of the European Union further complicate the framework and cause unnecessary administrative burden and a competitive disadvantage for EU tour operators.

On the transport side, land transport providers (such as buses/coaches) are faced with administrative burden and legal uncertainty originating from a complex framework for the taxation of cross-border passenger transport.

An updated framework, building on the reform 'VAT in the digital age', aims to modernise the special scheme for travel agents and the VAT rules on passenger transport services with a view to provide more competitive, fairer, simpler and harmonised VAT rules for the EU tourism sector.

Transparency of accommodation classification and other quality certification systems

Reliable information about accommodation characteristics is an important factor in traveller choices. It is also an important means for accommodation providers to design, position and distinguish their offer. Relevant characteristics can include equipment, services, size, accessibility, social and environmental commitments, quality and design, amongst others. They can exist for hotels, hostels, campsites and other accommodation options, and help position the accommodation offer together with price and location.

Widely known are accommodation classification approaches such as hotel star rating systems. These quality rating systems are well established, managed locally, regionally or nationally by public or private entities, e.g. regions, chambers of commerce or accommodation associations. While cross-border initiatives such as Hotelstars Union[195] have contributed to common standards among participating countries, uptake and comparability of quality rating systems remains limited, in particular for international travellers.

Other quality labels usually focus on sustainability attributes – sustainable, environmental, social, accessibility or other – and are awarded after an accreditation and certification process. They can be managed by private organisations (e.g. Nordic Swan[196]) or public authorities, including based on legislation (e.g. EU Ecolabel[197]). The EU Ecolabel is the official EU voluntary label for environmental excellence, guiding consumers and procurers towards sustainable goods and services, while supporting operators in stepping up their efforts to reduce environmental footprint, optimise operations and reduce costs. As of September 2026, 1051 tourist accommodation services held the EU Ecolabel, an increase of 7% since March 2026, showing a consistent growth in the uptake of sustainability certification within the hospitality

[195] Hotelstars Union, About the Hotelstars Union: System and History, accessed November 2026.
[196] Nordic Ecolabelling, Nordic Swan Ecolabel, accessed November 2026.
[197] European Commission, EU Ecolabel, accessed November 2026.

sector, encouraged by consumer demand and incentives provided by the online booking platforms.

In addition, accommodation quality and experience are rated by users, often as part of services offered by online intermediaries (e.g. user feedback and reviews on social media and booking platforms). Such accommodation and hospitality ratings are governed by platform rules, with platforms themselves subject to the Digital Services Act (DSA). At EU level, a voluntary Code of Conduct for online reviews and ratings for tourism accommodation[198] has been co-developed with stakeholders from across the tourism ecosystem. These stakeholders represent diverse perspectives within the industry, including online platforms hosting reviews, associations of these platforms, accommodation providers and their associations, consumer organisations, and Destination Marketing Organisations (DMOs). The co-creation process has been facilitated and supported by regulatory authorities and the Commission. Platforms and tourism associations are invited to sign up to common definitions and principles, including measures ensuring transparency, clear complaint procedures, and addressing risks of inappropriate, illegal and fake content with the aim to improve reliability, comparability and trustworthiness of online tourism reviews for travellers. The increasing use of generative AI also raises new challenges for the reliability of online reviews and accommodation listings, which could be considered in further policy development.

Readability, comparability and, possibly, harmonisation of accommodation information are recurrent questions discussed in the context of consumer protection, business development, simplification and tourism development. The aim would be to overcome confusion among travellers and uneven market conditions for accommodation providers, especially small businesses operating across borders. However, these systems are deeply anchored in local and national practices and costs and benefits would need to be carefully evaluated. The process of negotiating and agreeing the Code of Conduct for online reviews and ratings for tourism accommodation has also demonstrated that voluntary action involving the broader ecosystem can yield relatively quick results and ensure transparency, operational flexibility and adaptability of the process.

In an increasingly digital environment, where online ratings and reviews play an ever-greater role, the completeness, comparability and reliability of available information have become key considerations. Stakeholder views differ, with some advocating expanding use of existing (cross-border) approaches while others advocate for recognition of existing credible schemes. For this reason, options to make accommodation classification systems and quality labels more transparent, comparable and easier to understand and use across borders could be evaluated, while gradually exploring whether similar approaches could be extended to other quality certification systems. Stakeholders, could help evaluate current frameworks and propose options and recommendations for added value of accommodation related quality schemes, gradually explore coverage and improved readability and comparability for users of various quality and sustainability certification systems, and continue implementing and developing the Code of Conduct for online reviews and ratings for tourism accommodation, including for quality ratings and certification schemes**.**

[198] European Commission, Code of Conduct for Online Reviews and Ratings for Tourism Accommodation, accessed November 2026.

3.1.4 Funding

Tourism has a long history of funding support from the EU budget. Direct funding for competitiveness, innovation and modernisation, with a focus on (small) tourism businesses is typically complemented by funding for local and regional development and other specific purposes, including the green and digital transitions, skills and employment. Transport infrastructure essential for tourism has benefited from several EU funding sources, including the Connecting Europe Facility, Recovery and Resilience Facility, Social Climate Fund, as well as Cohesion Funds.

Multiannual Financial Framework 2021-2027

Under the current multiannual financing period, tourism is eligible and has benefitted from funding under 15 financing programmes, including Cohesion Funds, the Recovery and Resilience Facility (RRF), Horizon Europe, the Single Market programme (SMP), the Digital Europe Programme (DEP) and Erasmus+.

EU Cohesion Policy (EUR 3.71 billion in EU funding, increasing to EUR 4.87 billion with national contributions), in particular through the European Regional Development Fund and its Interreg strand, supports European countries, regions and municipalities in promoting the green and digital transitions, boosting their long-term resilience and sustainability, and reinforcing their role in socioeconomic and territorial cohesion and cooperation across borders. Support has been programmed across 98 national and regional Cohesion Policy programmes in 18 Member States, (with around 50% of the funding support concentrated in Poland, Hungary, Romania, and Italy), and in 62 Interreg programmes**.** The tourism ecosystem has also benefitted from non-targeted support for SMEs, green and digital transition, culture, social inclusion, social innovation and administrative cross-border cooperation.The Recovery and Resilience Facility (EUR 13.25 billion) supports tourism in 19 Member States primarily through investments such as destination upgrading, heritage assets, digitalisation, and SME modernisation. The main Member States making investments through the RRF are Spain, Italy, Portugal and Croatia. Among major activities financed are Spain's "Transformation of the tourism model towards sustainability" (EUR 1.923 billion) and Italy's "Funds for the competitiveness of tourism enterprises" (EUR 1.786 billion), followed by Italy's "Attractiveness of small historic towns" (EUR 1.020 billion) and Spain's "Special actions in the field of competitiveness" (EUR 920 million).

Reforms typically focus on enabling delivery through financial instruments and implementation frameworks to channel investment or monitoring and coordination tools as well as some regulatory updates to improve market functioning. In the tourism domain, transformation under NextGenerationEU is delivered primarily through investment programmes (destination upgrading, heritage assets, digitalisation, and SME modernisation), whereas reforms tend to play a more enabling role. This contrasts with other policy areas covered by Member States' Recovery and Resilience Plans (RRPs), such as labour markets, public administration, or energy markets, where reforms are often a primary lever.

The reforms captured in the tourism ecosystem inventory typically concentrate on the following set of functions:

- financing instruments that steer public and private investment towards policy goals (e.g. repayable loan funds targeting innovation, energy efficiency and circular economy);

- governance and regulatory frameworks that improve market functioning and service quality (e.g. professional frameworks for tourist guides or artists, or upgrading vocational education and training);
- data, monitoring and coordination tools (e.g. tourism data platforms and multi-level coordination arrangements).

The Single Market Programme (SMP) has launched several tourism focused calls to provide technical and financial support for SMEs with a total budget of over EUR 48 million covering the period 2021-2026. These include *COVID-19 Recovery Through Sustainable Tourism Growth and SME Support*[199] launched in 2021 (EUR 12.4 million); *Sustainable growth and building resilience in tourism – empowering SMEs to carry out the twin transition*[200] launched in 2022 (EUR 20.5 million); *Transitioning to a more sustainable and resilient ecosystem – empowering tourism SMEs*[201] launched in 2023 (EUR 8.5 million) and *Supporting sustainable competitiveness of tourism SMEs*[202] launched in 2026 (EUR 6.9 million). Additional calls to support SMEs will be launched under the SMP in 2027.

The Commission also provides technical assistance and learning opportunities to SMEs and public administrations in tourism. The Enterprise Europe Network (EEN) has a Tourism Sector Group with 40 active members in 25 countries and regions. Additionally, 51 EU Digital Innovation Hubs support the travel and tourism sector[203]. The EU Cluster Collaboration Platform supports 14 tourism clusters together with 2 Euroclusters[204] providing both financial and technical support for tourism SMEs. By 2026, Erasmus for Young Entrepreneurs[205] has supported 1337 exchanges, where either the new entrepreneur or host entrepreneur's primary sector was a hotel, restaurant, tourism or travel service or wellness. Furthermore, the Commission, with financial support from the European Parliament, developed pilot actions on digitalisation guidance for the restaurant sector[206], mobilised stakeholders to develop Product Environmental Footprint methods for hotel accommodation, and supported traditional crafts[207].

Through the Technical Support Instrument (TSI), the Commission has supported Member States' public administrations in designing and implementing reforms, fostering a more sustainable, resilient, and digital tourism ecosystem. The Digital Europe Programme (DEP) supports the deployment of the Common European Tourism Data Space, and the upskilling and reskilling of tourism staff is supported through the Erasmus+ programme. InvestEU[208] provides long-term funding by leveraging public and private investment. Support for SMEs,

[199] European Commission, COVID-19 Recovery Through Sustainable Tourism Growth and SME Support, Single Market Programme (SMP-COSME-2021-TOURSME-01), December 2021.
[200] European Commission, Sustainable Growth and Building Resilience in Tourism: Empowering SMEs to Carry Out the Twin Transition, Single Market Programme (SMP-COSME-2022-TOURSME-01), September 2022.
[201] European Commission, Transitioning to a More Sustainable and Resilient Ecosystem – Empowering Tourism SMEs, Single Market Programme (SMP-COSME-2023-TOURSME-01), December 2023.
[202] European Commission, Supporting Sustainable Competitiveness in Tourism, Single Market Programme (SMP-COSME-2026-TOURSME-01), March 2026.
[203] European Commission, European Digital Innovation Hubs Network, accessed November 2026.
[204] European Circular Economy Stakeholder Platform, ECCP: European Cluster Collaboration Platform, accessed November 2026.
[205] European Commission, Erasmus for Young Entrepreneurs, accessed November 2026.
[206] European Digital Innovation Hubs Network, RESTwithEU: Supporting the Implementation of Digital Tools for Tourism and in the Restaurant Sector, accessed November 2026.
[207] European Commission, The Promotion of Handicraft Products and Support of Craftsmen, Pilot Projects and Preparatory Actions, September 2025.
[208] European Commission, InvestEU Programme, accessed November 2026.

including in tourism, is mainly channelled via local financial intermediaries well placed to accommodate local needs and particularities. Member States may increase investments via dedicated Member States compartments. The InvestEU Advisory Hub and the InvestEU Portal[209] offer opportunities for tourism development and investment.

The diversity of EU funding programmes and support instruments can make it challenging for tourism stakeholders, particularly SMEs and smaller destinations, to identify the opportunities most relevant to their needs. To facilitate access to information, the Commission provides the Guide on EU funding for tourism[210], which brings together information on relevant EU programmes, links to their websites and a selection of open and upcoming tourism-related calls. The EU Tourism Platform complements the Guide by providing information on funding opportunities, practical tools and results from EU-supported projects, helping stakeholders learn from previous initiatives and identify support relevant to their needs.

Support by the European Investment Bank (EIB) Group

The EIB Group supports investments by tourism businesses and by public or private entities involved in the development of tourism destinations where these contribute to its applicable public policy goals. While tourism is not a standalone EIB Group public policy goal, tourism-related investments may be considered under several relevant policy areas, depending on their objectives, characteristics and expected impacts.

Relevant eligibility areas include access to finance for SMEs and mid-caps, climate action and environmental sustainability, innovation and digitalisation, economic and social cohesion, urban and regional development[211], cultural heritage and enabling infrastructure. Investments may include the renovation, expansion and modernisation of tourism assets, improvements in energy and water efficiency, renewable energy installations, climate adaptation and resilience measures, digital solutions, cultural facilities, sustainable mobility and infrastructure benefiting asset owners and operators, visitors and local communities.

Given the predominance of smaller businesses in the tourism sector, EIB Group support is provided mainly through financial intermediaries[212], including commercial banks, national promotional banks and institutions, leasing companies and investment funds. Instruments include loans, guarantees, risk-sharing, securitisation and equity financing. Decisions on individual investments are delegated to the financial intermediary, subject to the EIB Group's eligibility criteria and the intermediary's own credit procedures.

Larger tourism-related investments may also be considered selectively for direct EIB financing. Particular consideration is given to their contribution to applicable public policy goals, integration into the local economy, support for local supply chains and employment, climate resilience, resource efficiency and longer-term benefits for destinations and local communities. Where relevant, investments may also promote sustainable and innovative procurement practices, supporting local suppliers and strengthening the resilience and competitiveness of tourism-related value chains.

---

[209] European Commission, InvestEU Programme, accessed November 2026.
[210] European Commission, Guide on EU Funding for Tourism, accessed November 2026.
[211] European Investment Bank, Regional Development, accessed November 2026; European Investment Bank, Urban Development, accessed November 2026.
[212] European Investment Bank, Loans for SMEs and Mid-Caps, accessed November 2026.

The EIB Advisory function may consider tourism-related requests under applicable mandates. Subject to the objectives, eligibility criteria and resources of the relevant mandate, Advisory support helps public authorities, financial intermediaries and project promoters develop integrated sustainable tourism strategies, identify and structure sustainable investment programmes, build investable project pipelines, and strengthen institutional and implementation capacity. Support may also include the design of financial instruments and aggregation mechanisms, as well as the preparation of investments in areas such as energy efficiency, resilience to climate-related and other hazards, regional development, sustainable mobility, cultural heritage and urban regeneration. By improving project readiness and helping mobilise public and private investment, EIB Advisory can play a catalytic role in connecting sustainable tourism priorities with appropriate financing opportunities. The availability, scope and form of support are assessed on a case-by-case basis. Advisory support does not constitute a commitment to subsequent EIB Group financing.

The EIB Group also contributes indirectly to the objectives of the Strategy through investments that do not necessarily involve tourism-sector counterparts but help make tourism activities and destinations more robust, resilient and sustainable over the long term. These may include investments in coastal resilience, in line with the EU Strategy for Coastal Communities[213], and in broader resilience and disaster preparedness addressing multiple hazards affecting infrastructure and the built environment in tourism regions.

The tourism industry is particularly exposed to external shocks because of its dependence on visitor mobility and discretionary spending. Travel restrictions, pandemics, natural hazards, security incidents or economic downturns can lead to sudden declines in demand while businesses continue to face high fixed operating costs. SMEs may be particularly vulnerable due to their smaller scale, limited financial buffers and concentration in specific destinations or customer segments.

The EIB Group has experience in contributing to temporary, economy-wide responses through financing, guarantees and risk-sharing instruments. These measures are generally horizontal, supporting eligible businesses across affected sectors rather than constituting tourism-specific facilities, although tourism businesses may benefit where they meet the relevant requirements. Beyond the immediate response, the EIB Group can provide long-term advisory and financing support for reconstruction, preparedness and risk reduction. This may include helping tourism-dependent regions adapt their infrastructure and development models to structural changes, including evolving climate risks and other long-term pressures. Such support can be particularly relevant for regions where tourism is an important source of employment and income, including cohesion regions. The EIB Group's contribution would form part of a broader coordinated response and remain subject to the applicable mandates and institutional framework.

[213] European Commission, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: EU Strategy on resilient, prosperous and liveable coastal communities, COM(2026) 530 final, June 2026.

Examples:

Financing and investment operations signed by the InvestEU implementing partners[214] include tourism as an eligible area, in addition to tourism-related areas such as culture, the creative sectors and media, the environment, industrial site rehabilitation or mobility.

In July 2025, the EIB signed agreements with **Buenavista Infrastructure and Arcano Partners** to channel via financial intermediaries a total of EUR 410 million to new urban development projects (including affordable housing) and others related to sustainable tourism[215]. The agreements were made possible by a contribution from the Regional Resilience Fund, part of Spain's Recovery, Transformation and Resilience Plan and financed by NextGenerationEU. The intermediaries selected by the EIB will assess investment opportunities across the country to promote urban development in areas such as affordable housing, education, healthcare, social and cultural infrastructure, sustainable mobility, waste and water management, energy efficiency and sustainable tourism.

The EIB is providing a EUR 100 million loan to Austrian tourism and leisure-industry lender **Österreichische Hotel- und Tourismusbank GmbH (ÖHT),** with EUR 50 million signed in December 2025 and a further EUR 50 million in August 2026[216]. ÖHT will on-lend the EIB financing to SMEs in Austria's tourism and leisure sector. These are expected to include family-run firms investing in energy efficiency in buildings (building envelope, technical systems), renewable energy generation and infrastructure for low-carbon transport. The SMEs will benefit from favourable pricing for their productive investments. To maximise local impact, tourism businesses are supported to expand their use of support services, such as construction, maintenance, and logistics, to drive jobs and growth outside their own activity while offering opportunities for the next generation.

Support by the European Bank for Reconstruction and Development (EBRD)

The European Bank for Reconstruction and Development (EBRD) is a multilateral development bank active across three continents, with a strong private-sector focus. In the EU, the Bank operates in 10 Member States across Central Europe, the Baltic states and South-eastern Europe. Under its **Real Estate Sector Strategy 2025–2029**, the EBRD combines tailored financing, including debt, equity and mezzanine instruments, with advisory services and technical assistance to help tourism companies invest, modernise and become more competitive, sustainable and resilient. Its financing focuses on three priority areas: **the green transition, economic inclusion and stronger local value chains**.

First, the EBRD accelerates the **green transition** by financing high-quality, sustainable tourism assets, including the renovation and modernisation of existing facilities. Its activities help improve environmental performance and resource efficiency, reduce the environmental footprint of tourism operations, strengthen climate resilience and develop more sustainable tourism infrastructure.
Second, the EBRD promotes **economic inclusion** by helping tourism companies create quality jobs, improve working conditions and invest in skills development, vocational education and career progression. It also supports employment opportunities for women, young people and

[214] European Commission, InvestEU Operations List, accessed November 2026.
[215] European Investment Bank, New Boost for Regional Resilience Fund Rollout: Financing Affordable Housing, Urban Development and Sustainable Tourism, June 2025.
[216] European Investment Bank (EIB), OHT Loan for SMEs, project reference 20240758, December 2025.

disadvantaged groups through inclusive recruitment, equal opportunities and improved access to management positions. Third, the EBRD maximises tourism's wider economic impact by strengthening **inclusive local value chains**. It encourages tourism operators to source more goods and services from local businesses, including SMEs in food and agriculture, transport, construction, cultural industries and other services. This fosters local entrepreneurship, creates opportunities in surrounding communities and retains more tourism revenue within local economies. Across these three areas, the EBRD provides advisory support and technical assistance to help tourism companies meet the quality and operational requirements of larger operators, and adopt stronger corporate governance, operational and sustainability standards.

Examples:

The Destination Management Plan in Rhodes and Santorini[217] was a pilot programme run by the EBRD from May to October 2019, together with the Hellenic Ministry of Tourism and the Chambers of Commerce of the Cyclades and Dodecanese, and funded by the European Union. It addressed the challenges of rapid tourism growth in Rhodes and Santorini, with the aim of increasing the benefits of tourism for the sector and for local communities. The programme combined research on travel trends and tourism supply and demand, workshops and working meetings with local stakeholders, and interviews and online questionnaires with local authorities, businesses, residents and recent visitors. These inputs were used to produce two destination management plans, one for each island, plus a guide to help other Greek destinations develop similar plans. The results were to be presented to the local communities and to audiences in three more Greek destinations, including Athens, to support sustainable, long-term tourism development.

On 3 March 2026, the EBRD announced a EUR 15 MLN loan to the owner of Terme Čatež, Slovenia's largest natural thermal destination and a family-friendly, affordable leisure complex.[218] The loan will fund a capital investment programme covering hotel refurbishment, upgrades to water treatment and wastewater management (including groundwater pumping), and targeted energy efficiency improvements. These measures aim to improve service quality, resilience and competitiveness, and to make the destination more appealing year-round. The project also includes training and skills programmes for staff, run with local educational institutions, and supports a lower-carbon tourism model built on domestic and regional travel rather than long-haul visitors. The EBRD describes it as its first tourism investment in Slovenia and its first inland tourism project in the Adriatic region. The EBRD Real Estate Sector landing page provides further information on relevant projects.

Drawing lessons for strengthening future policy and funding links

Analysing the funding approaches under the MFF 2021-2027 and earlier envelopes confirms the need to increase the impact of tourism funding on the ground, by strengthening the link with the common EU policy objectives of this Strategy, the European Agenda for Tourism

[217] European Bank for Reconstruction and Development (EBRD), Destination Management Plan, accessed November 2026.
[215] European Bank for Reconstruction and Development (EBRD), "EBRD Supports Sustainable Tourism in Slovenia", accessed November 2026.

2030 and the Council Conclusions on *Building a sustainable and competitive tourism for the future* of 28 May 2026.

A 2021 Special Report from the European Court of Auditors (ECA)[219] aimed at providing input for "the Commission's work in defining a comprehensive 2030 tourism strategy with medium- and long-term objectives" and "to contribute also to a better design and implementation of the EU financial support to tourism investments in the period 2021-2027 with a view to achieving effective and sustainable results."[220] The audit looked into whether the Commission made an effective contribution in supporting the EU's tourism industry and complementing Member States' actions in this sector during the 2014-2020 period. It reviewed whether the Commission's tourism strategy addressed the needs of the tourism sector effectively and was regularly updated to reflect changing priorities. The ECA analysed whether the European Regional Development Fund (ERDF) financial support to public tourism investments was consistent with existing EU, national and regional tourism strategies and whether it has been sustainable and focussed on investments that add value beyond the project itself. The ECA recommended that "the Commission should:

- set out a new strategy for the EU tourism ecosystem, which explicitly aims at supporting investments that contribute to a more sustainable form of tourism; and
- encourage Member States to apply selection procedures for ERDF-funded tourism investments to support this new strategic orientation."

The Commission accepted the ECA's recommendations, feeding into the design of the Tourism Transition Pathway and encouraging Member States to adopt a more strategic and efficient approach to support tourism through ERDF in the 2021-2027 period in line with the Pathway. Although made against the background of the time of the audit, the Court's observations are still valuable for the design of the current Strategy. This translates in particular into the Strategy's focus on actions of core EU value-added, connecting with local, regional and national activities, e.g. the EU Tourism Academy, the European Tourism Data Space, the EU Tourism Alliance and the integrated financing paths for tourism outlined further below.

In 2026, the Commission supported a study of EU tourism funding over the period 2019-2022, which assesses how EU funding reaches the tourism ecosystem, identifies strengths and shortcomings in existing funding mechanisms, and puts forward recommendations for future funding programmes. It shows that funding was channelled through two distinct but complementary routes: direct management and shared management.

Under direct management, tourism support was embedded in broader programmes such as Horizon/Horizon Europe, COSME and the Single Market Programme, Creative Europe, Erasmus+, Digital Europe and LIFE. Tourism-related direct funding was therefore not organised as a stand-alone portfolio, but as a cross-cutting set of projects financed under wider policy objectives such as innovation, SME competitiveness, culture, skills and the digital transition.

The direct management evidence points to a portfolio with high strategic relevance but low penetration within the largest programmes. The direct management beneficiary profile reveals

[219] European Court of Auditors, EU Support to Tourism: Need for a Fresh Strategic Orientation and a Better Funding Approach, Special Report No. 27/2021, December 2021.
[220] European Court of Auditors, EU Support to Tourism: Need for a Fresh Strategic Orientation and a Better Funding Approach, Special Report No. 27/2021, December 2021.

a strong concentration in organised intermediaries and public actors. This indicates that direct management largely reached tourism through actors with stronger project-development capacity, proposal-writing skills and network access.

Funding by tourism subsector was also highly concentrated: attractions and cultural sights absorbed approximately EUR 48.9 million, and tourist information and guide services around EUR 11.8 million, while accommodation, travel agencies, tour operators, bars and restaurants and passenger transport each remained below EUR 2 million. Attractions and cultural sights alone represented around 77% of the tourism funding captured by stakeholders in the direct management dataset. A different accessibility pattern is visible in third-party or cascade funding: within the analysed subset of 145 cascade beneficiaries, SMEs accounted for the full beneficiary base, and participation extended more visibly into underrepresented subsectors such as accommodation, restaurants and tour operators.

Under shared management, the European Structural and Investment Funds provided the main large-scale investment route for tourism. The evidence reviewed indicates that almost EUR 10 billion were used for tourism-related activities through ERDF, ESF and Cohesion Funds combined in the 2014-2020 cycle, which remained the main implementation framework up to 2022.

Strategic recommendations from the study for future funding approaches include making the existing architecture more strategic, targeted and proportionate to the realities of tourism. Thus, future funding should be organised more explicitly around jointly agreed tourism policy objectives, including this Strategy and the Transition Pathway. This allows linking instruments to concrete medium-term objectives such as resilient destinations, low-carbon tourism models, digital destination management, skills renewal and climate adaptation in tourism-dependent territories.

The study also recommends that the funding system should make stronger use of layered delivery models that connect large flagship projects with downstream uptake mechanisms such as cascade funding. This would improve the conversion of EU-level experimentation into broad ecosystem impact. Future approaches should also introduce more targeted corrective measures for underfunded subsectors and territories, particularly accommodation, food services, intermediaries and other fragmented segments that face high transition needs but weak funding uptake. This may require more subsector-sensitive call framing, collective transition vehicles and territorially anchored support models. Finally, the analysis stresses that SME financing needs simpler access channels, stronger advisory and intermediation ecosystems, more proportionate selection logic, and clearer progression routes between first-entry instruments and more advanced funding opportunities.

Towards the Multiannual Financial Framework (MFF) 2028-2034

The Commission's proposals for the MFF 2028-2034 provide opportunities to support tourism through several EU funding instruments. Horizon Europe and the European Competitiveness Fund could support research, innovation and competitiveness, while AgoraEU could contribute to culture, cultural and linguistic diversity and heritage, including as an asset for sustainable tourism, and Erasmus+ to education and training. The tourism-related objective included in the Commission's proposal for a Regulation on National and Regional Partnership Plans (NRPPs) could support initiatives developing sustainable, competitive and balanced tourism, subject to

the outcome of the legislative negotiations and Member States' programming choices. Key transport infrastructure will be funded through the Connecting Europe Facility.

To facilitate access to EU funding opportunities, the Commission's proposal for the next MFF also foresees a Single Gateway[221], providing a single access point to consolidated information on EU funding opportunities for potential beneficiaries, including tourism businesses and other tourism stakeholders. This would help improve the visibility and accessibility of funding opportunities across different EU programmes and instruments, subject to the outcome of the legislative negotiations.

The new MFF will also equip Europe with faster, more efficient and flexible tools to withstand shocks and respond to new challenges. It will continue to build Europe's resilience by financing the Preparedness Union and prepare for all stages of crisis management: from prevention to response and recovery. The Commission is proposing a new dedicated crisis mechanism with a capacity of up to almost EUR 400 billion of loans to Member States, to be triggered when severe crises hit the Union[222]. Furthermore, NRPPs will support investments and reforms in all areas of preparedness and crisis management.

The proposed regulation on the Union Civil Protection Mechanism and Union support for health emergency preparedness and response (UCPM+) sets out the objectives of the strengthened mechanism, its budget, and the rules for providing funding between 2028–2034[223]. UCPM+ is designed as a key EU-level instrument for integrated crisis management – from risk assessment, to deploying response capacities. Its general objective, broken down into six specific objectives, is to strengthen coordination and cooperation with Member States at EU level and enhance the Union's ability to prevent, prepare for and respond to all kinds of disasters, serious cross-border health threats, and crises impacting several sectors simultaneously.

In designing the funding and investment pathways for the present Strategy, the Commission carefully considered lessons drawn from earlier funding periods. The next MFF is a unique opportunity to streamline funding and strengthen impact on the ground. In line with the logic of the new MFF, this Strategy focuses direct EU funding support on carefully selected common priority investment areas (digital, climate, environment, skills in particular) that should yield commonly accepted approaches (e.g. skills, promotion), reference criteria (including balanced tourism guidelines, carrying capacity, tourism management) and tools (e.g. Tourism Data Space) which in turn represent voluntary reference tools for rollout and scaling up under the NRPPs. This integrated approach is expected to considerably increase the impact of joint EU-Member States policymaking in tourism.

Additional investment support and targeted advice will be available under the proposed ECF InvestEU Instrument and ECF Project Advisory[224], building on existing successful InvestEU funding and advisory capacities, including the InvestEU Portal[225], with opportunities to

[221] European Commission, Proposal for a Regulation Establishing a Budget Expenditure Tracking and Performance Framework and Other Horizontal Rules for Union Programmes and Activities, COM°(2025)°545 final, July 2025.
[222] European Commission, The EU's Long-Term Budget 2028-2034, accessed November 2026.
[223] European Commission, Proposal for a Regulation on the Union Civil Protection Mechanism and Union Support for Health Emergency Preparedness and Response, COM°(2025)°548 final, July 2025.
[224] European Commission, Proposal for a Regulation Establishing the European Competitiveness Fund, COM(2025) 555 final, July 2025.
[225] European Commission, InvestEU, accessed November 2026.

facilitate access to finance for SMEs, including through guarantees and financial intermediaries.

Such improved policy alignment follows the logic of the next MFF, linking research and experimentation to common tooling and best practice roll out. It will also be supported by strengthening the tourism dimension in the European Semester process[226].

3.2 A sustainable, accessible and resilient ecosystem

The Strategy focuses on strengthening the sustainability, accessibility and resilience of Europe's tourism ecosystem. Climate change and environmental degradation, with Europe warming faster than any other continent, are already reshaping tourism destinations and tourism flows through more frequent and severe weather events, wildfires, floods, coastal erosion, declining snow reliability and loss of biodiversity.

These developments are no longer isolated or seasonal. They represent a structural and growing challenge for tourism destinations and their communities and, given the close link between environmental and social sustainability, put at risk the medium-to-long-term economic sustainability of the sector.

Addressing these challenges requires a more integrated approach to destination management that combines environmental, social, economic and governance considerations. Building on the consultation process, this pillar therefore sets out a coherent framework of mutually reinforcing actions to help destinations become more sustainable, accessible and resilient.

3.2.1 EU Model for Tourism Management

A central objective of this Strategy is to support destinations in managing tourism in a more integrated, sustainable and resilient way. To achieve this, the Strategy introduces an EU Model for Tourism Management, providing a common European framework that helps destinations assess progress, share knowledge and apply practical tools while remaining sufficiently flexible to reflect local circumstances.

While tourism is one of Europe's most important economic and social sectors, the destinations that sustain it are being asked to do more with less: absorb growing visitor flows, protect fragile ecosystems and cultural heritage, and modernise their governance and services, all while operating with fragmented resources and uneven digital maturity. The barriers destinations face are rarely about ambition, with Destination Management Organisations (DMOs) across Europe already engaged in sustainability and digital transition efforts, as the examples in this Staff Working Document show, but about the absence of synergies between national, regional and local initiatives, and the lack of a shared reference point at EU level to help coordinate, compare and scale up successful approaches across Europe. Supporting destinations to become smarter (meaning not only being highly digitalised and AI-savvy, but also sustainable, accessible and crisis-prepared) requires a coherent European approach that connects existing tools, standards, and knowledge into a common framework that destinations can readily apply, rather than relying solely on isolated projects or one-off funding calls.

[226] European Commission, Directorate-General for Economic and Financial Affairs, Country pages (including Country Reports), tourism-related economic analysis, accessed November 2026.

The Model is based on the recognition that smart tourism cannot be treated as a sector-specific add-on but must be embedded in how destinations are planned and governed as a whole. This means integrating tourism considerations into urban and territorial planning, so that mobility, housing, environmental management, and visitor economy strategies are designed together rather than in silos. The Model will provide destinations with common references to assess progress, exchange good practices, benchmark performance and access targeted support.

The consultation process showed clear and strong support for smart tourism, a more coordinated European approach to destination management, and EU action to support smart destinations. Smart tourism was identified as a priority, with stakeholders and Member States ranking smart destinations and the integration of the Internet of Things among the most promising innovation trends. In addition, the public consultation showed strong citizen support for a common EU standard and definition for smart destinations as the highest priority for smart tourism.

Additionally, a workshop on smart destinations, organised by the 2025 European Capital of Smart Tourism, Torino (Italy), in December 2025 as part of the consultation process for this Strategy, concluded that despite genuine progress across several EU-funded initiatives (Sustainable EU Tourism project, Smart Tourism Destinations, D3HUB, and the European Capitals of Tourism – former European Capital and European Green Pioneer of Smart Tourism), European destinations remain held back by fragmented governance, uneven digital maturity, and siloed data ecosystems that prevent knowledge and best practices from being shared across borders. To address these challenges, the workshop proposed a common European methodology and indicators, the integration of smart tourism into broader territorial and urban planning, a European Tourism Academy to upskill DMOs, businesses and future professionals, and a European Tourism Data Space serving as common reference for data governance, funding coordination and benchmarking across destinations, regardless of size or administrative level. These recommendations directly inform the design of this Model. These findings are further reinforced by the 2024 report on *Supporting sustainability and resilience of EU tourism destinations*, based on a survey of 222 DMOs across all 27 Member States as part of the Sustainable EU Tourism project[227].

Building on successful initiatives and best practices from Member States, the EU Model for Tourism Management will provide destinations with a flexible framework that integrates tourism into urban and territorial development while equipping them with practical tools to support sustainable, balanced and data-driven destination management. It will promote good governance, interoperability and the strategic involvement of local communities.

Examples – Frameworks for tourism management

Destinos Inteligentes, Spain[228] – Spain's Smart Tourist Destination framework (*Destinos Turísticos Inteligentes*, DTI) was set in motion in 2012, when the Ministry of Industry, Energy and Tourism decided to transform the national tourism model around innovation, technology, sustainability and accessibility. Its central coordination instrument, the DTI Network, was launched in 2018, initially including nearly 70 destinations located across Spain's 17 autonomous regions. The programme is promoted by the Spanish Secretary of State for

[227] European Commission, Supporting Sustainability and Resilience of EU Tourism Destinations: Deliverables 1.2 & 1.3, submitted by Intellera Consulting and consortium partners, August 2024.
[228] SEGITTUR, Smart Tourism Destinations (Destinos Turísticos Inteligentes), accessed November 2026.

Tourism (SETUR) and managed by SEGITTUR, the State Society for the Management of Innovation and Tourism Technologies, and focuses on five key areas of action: governance, innovation, technology, sustainability and accessibility. Its main features are a shared diagnostic methodology that produces tailored recommendations, an action plan and a monitoring system for continuous improvement, paired with a collaborative network that enables knowledge transfer and synergies between public and private members. It counts 538 members (386 of them destinations, alongside 74 collaborating companies, 72 institutional members and 6 international observers). More recently, the framework's maturity is reflected in continued investment (46 destinations in the DTI Network received 95 million euros in funding from the Ministry of Industry and Tourism to strengthen their technological capabilities, with funding lines dependent on the registration to the network) and the 2025 rollout of a national Smart Destination Platform to integrate public and private tourism data. The model is also being exported to South America, where an Iberoamerican Network of Smart Destinations has been established.[229]

Tourism Act, Croatia[230] – The Croatian Parliament published the Law on Tourism in December 2023 with the goal of improving the quality and sustainability of tourism in Croatia. The main points include the development of tourism strategies, governance of tourism destinations, promotion of sustainable mobility, and the green transition of tourism companies and SMEs. It also focuses on innovative tourism services, improving statistics and indicators, and enhancing the online visibility of the tourism offer.

To implement the Strategy, the Commission plans to launch a preparatory phase in 2027 under the Single Market Programme to develop a blueprint for the EU Model for Tourism Management, including the methodology, governance framework, tools, success criteria, benchmarks and a pilot project. The blueprint should also identify priority use cases for its application. The aim would be that by 2030, the Model should progressively develop to integrate existing EU support measures for destinations and provide practical tools to address common challenges, including (the list of use cases is not exhaustive):

- Balanced management of tourism flows based on the Toolbox for Balanced Tourism;
- **Error! Reference source not found.**Responsible and effective use of AI at destination level;
- Better governance and stronger involvement of public authorities, local SMEs and communities in decision-making;
- Crisis preparedness and management tools;
- Organisation and portfolio development of major events (sport, culture, business, etc.);
- Promotion of sustainable mobility options and active tourism (cycling, walking);
- Improved accessibility of destinations and tourism services;
- More sustainable and efficient water and energy management,
- reducing waste and air, noise, soil and water pollution;
- Stronger visibility for smaller destinations and attractions;
- Monitoring and capturing greater tourism value for local host communities.

[229] Red Iberoamericana de Destinos Turísticos Inteligentes, Red Iberoamericana de Destinos Turísticos Inteligentes (RIDTI), accessed November 2026.
[230] Republic of Croatia, Tourism Act (Zakon o turizmu), Official Gazette No. 156/2023, December 2023.

These tools should reflect the different needs of destinations, from managing excessive visitor flows in established tourism hotspots to supporting emerging destinations in developing appropriate governance structures, stakeholder cooperation and sustainable tourism products.

Water management is a concrete example of the potential application of the Model. Due to climate change, the tourism sector is particularly exposed to the risk of "too little water and too much water". The very same regions can experience severe water scarcity and suffer from flash floods. Water availability becomes less predictable. This is why water retention in touristic regions and urban areas ("sponge cities") should become a priority for all tourism hotspots. Having water available during the peak season will require closer cooperation between the tourism sector and the water sector. Funding water reuse, for instance, presupposes not only investments in upgrading water treatment plants, but also investments by the hospitality industry to use reclaimed water to irrigate their green areas.[231] These investments must be coordinated. Cooling cities with water, too, requires investments in water availability and hence closer cooperation between municipalities and water managers. Climate change therefore necessitates a more inclusive form of water governance. Water using sectors and water producing sectors should work closely hand in hand to promote water retention (nature-based solutions), water reuse and water efficiency[232].

3.2.2 Balanced, accessible and inclusive tourism

Unbalanced tourism can be understood as a structural concept, referring to the disproportionate distribution of tourism flows - whether spatial, temporal, or demographic - that leads to inefficiencies, inequalities, and sustainability risks[233].

Unbalanced tourism growth within and across destinations and seasons remains a challenge for many parts of Europe. In recent years, tourism policy has increasingly recognised the need to move beyond traditional destination marketing towards more integrated approaches to visitor flow management, participatory governance and cross-border cooperation[234].

Seasonality remains pronounced across parts of the EU. In 2025, 31.1% of all nights spent in tourist accommodation establishments in the EU were concentrated in July and August. The share reached 54.5% in Croatia, 43.4% in Bulgaria and 41.6% in Greece. Across the EU, the number of nights spent in August was 3.6 times higher than in January[235]. The territorial dimension is also significant: according to the EU Tourism Dashboard, in 70 of 237 EU NUTS 2 regions assessed, more than 70% of overnight visitors were concentrated in just three months of the year[236].

Where tourism development is not guided by strategic and inclusive destination management, tourism growth may outpace the carrying capacity[237] of destinations and insufficiently take into

[231] European Commission, Algarve Regional Water Efficiency Plan, accessed November 2026.
[232] Water Europe, Attica Water Lab, accessed November 2026.
[233] T4T Expert Group, Navigating the Future: Strategies for Sustainable and Balanced Tourism in the EU, accessed November 2026.
[234] OECD, OECD Tourism Trends and Policies 2026, Chapter 2, "Tourism Policies, Priorities and Governance", July 2026.
[235] Eurostat, Summer peak: 31% of tourism nights in August and July, July 2026.
[236] Joint Research Centre (JRC), EU Tourism Dashboard: Tourism Seasonality Indicator, accessed November 2026.
[237] European Commission: European Innovation Council and SMEs Executive Agency, Lucerne University of Applied Sciences and Arts School of Business Institute of Tourism and Mobility, ÖIR, Eberswalde University

account community needs and environmental sustainability, generating wider negative impacts. High tourism density areas are often characterised by polarisation among local communities, with residents perceiving both very positive and very negative impacts of tourism. An increasing number of Member States are already measuring resident tourism acceptance[238]. These structural challenges are compounded by broader pressures, including housing pressures where short-term rentals may be an aggravating factor in some specific areas,[239] climate adaptation needs, concentration of visitors, labour shortages and external shocks.

At the same time, many emerging destinations, including those located near tourism hotspots, in rural areas or in regions undergoing industrial transition, continue to face barriers related to visibility, expertise, infrastructure and connectivity. In some cases, external factors, including security concerns linked to geopolitical conflicts, further weaken tourism demand and investment. This highlights the need not only to mitigate pressures in heavily visited destinations, but also to strengthen the attractiveness and resilience of destinations with untapped tourism potential. In this context, stakeholders have called for renewed EU-level guidance on achieving more balanced tourism flows. However, encouraging tourism development in lesser-known destinations also requires data-based decisions and considerations of appropriate connectivity options, local infrastructure and services, environmental capacity and community needs, to ensure that visitor flows bring value without creating new pressures.

The consultation process revealed broad stakeholder alignment on the need to tackle unbalanced tourism and support destinations with guidance and tools to manage tourist flows adequately, address seasonality challenges, and benefit local residents. The Together for EU Tourism (T4T) Expert Group also focused on this issue in 2025 and produced a report "*Unbalanced Tourism*" [240]. This work complements the Commission study of 2022 on *Unbalanced tourism growth at destination level-root causes, impacts, existing solutions and good practices,* which examined the drivers and impacts of unbalanced tourism and identified best practices and innovative approaches to support holistic, and long-term destination planning[241].

Numerous good practices from destinations show that measures are already being taken to better manage tourist flows, promote year-round touristic activity and involve local residents in the decision-making process.

---

for Sustainable Development Centre for Sustainable Tourism, Strasdas, W. et al., Unbalanced Tourism Growth at Destination Level – Root Causes, Impacts, Existing Solutions and Good Practices – Final Report, section 1.3.2, "Carrying Capacity", pp. 12–13, Publications Office of the European Union, August 2022.

[238] Dessart, F. J., Curtale, R., Batista e Silva, F. (upcoming). Residents' perception of tourism in the EU: measurement and determinants. JRC Science for Policy brief, JRC148678.

[239] European Commission, Commission Staff Working Document: Understanding the Housing Crisis, accompanying the European Affordable Housing Plan, SWD°(2025)°1050 final, accompanying COM°(2025)°1025 final, December 2025.

[237] T4T Expert Group, Unbalanced Tourism 2025: Final Report, EU Tourism Platform, February 2026.

[241] European Commission: European Innovation Council and SMEs Executive Agency, Lucerne University of Applied Sciences and Arts School of Business Institute of Tourism and Mobility, Eberswalde University for Sustainable Development Centre for Sustainable Tourism, ÖIR, Strasdas, W. et al., Unbalanced Tourism Growth at Destination Level – Root Causes, Impacts, Existing Solutions and Good Practices – Final Report, Appendix 6, Annotated Compendium, Publications Office of the European Union, August 2022.

Example cases:

Visitor management – Dubrovnik Pass[242] – The 2026 European Green Pioneer of Smart Tourism, Dubrovnik (Croatia), introduced the Dubrovnik Pass as the city's key smart visitor management tool. It is a digital ticket to the city's attractions, enabling Dubrovnik to regulate tourism flows while enhancing the visitor experience. In 2025, the system has been upgraded to include crowd forecasting and a reservation mechanism based on attraction carrying capacities, further strengthening heritage protection and visitor management. In 2025, a total of 486,550 visitors used the Pass, generating over 20.7 million euros in revenue. The funds generated by the Pass are used to finance the cultural sector, including cultural institutions, stakeholders, public transport, as well as the restoration of cultural heritage sites.

Seasonality – Winter tourism in Cyprus[243] – A core part of Agia Napa's sustainability model is its focus on reducing tourism seasonality. The city has developed specialised winter tourism programmes aimed at long-stay travellers. These curated experiences include visits to natural and cultural sites, local gastronomy tours, and traditional workshops at the Agrotospito. These initiatives offer authentic encounters while supporting the local economy in the off-season. To further reduce seasonality and promote sustainable, year-round tourism, Agia Napa has developed a strong winter sports tourism offer cantered around the Agia Napa Sports Centre. The Centre hosts major sporting events such as the Agia Napa Youth Soccer Festival and the Elite Neon Cup, drawing young athletes, families, and coaches to the destination. These events align with the city's strategy to diversify its tourism portfolio while encouraging community participation, healthy lifestyles, and responsible travel beyond the summer season.

Governance – Leipzig, Germany[244] – Leipzig's Tourism Sustainability Strategy (2024-2030) is the result of a collaborative effort, including over 80 stakeholders from the tourism sector. Based on a SWOT analysis, a stakeholder survey, and an expert workshop, more than 70 concrete measures were developed and structured into eight focus themes. A printed, digital and barrier free brochure was published as an operational framework for local and regional actors, with a focus on practical implementation in Leipzig and its surrounding region. Of particular importance is the network structure built through this process. Strong cooperation between Leipzig Tourism and Marketing Ltd. and the Leipzig Region Tourism Association formed the backbone of this strategic collaboration to foster the sharing of best practices, strengthen collective capacity, and support a coordinated implementation across the city and the region. As a strategic measure within the sustainability plan, Leipzig hosts regular meetings that bring together actors from the region to exchange experiences and track process. With formats such as presentations, advisory services, and participatory workshops, the yearly partner meeting is designed to adapt to changing political or regulatory contexts while generating lasting value for all participants.

Community involvement – Sibiu, Romania[245] – In Sibiu, sustainable tourism is built on social involvement of local communities. The city's residents are actively involved in tourism and cultural initiatives through participatory programmes. Open calls for community-led projects allow residents to co-design events in their neighbourhoods and get included in the city's decision-making process when it comes to public funding. The residents are involved

[242] Dubrovnik Pass, Dubrovnik Pass Official Website, accessed November 2026.
[243] European Commission, Leading Examples of Smart and Sustainable Tourism Practices in Europe: Presenting Best Practices, European Capital of Smart Tourism, accessed November 2026.
[244] Leipzig Travel, Sustainable Tourism Development, accessed November 2026.
[245] Sibiu City Hall, Official Website, accessed November 2026.

during major festivals through volunteering opportunities and grassroots initiatives that strengthen the community and the city's tourism model. For instance, the 'Community Dinner' on Xenopol Street, held in 2024, brought together locals, artists, and tourists into a collaborative event, highlighting the city's hospitality and community. Additionally, the Association of Restaurant Owners from the Turnului Street in Sibiu organise cultural and gastronomic events, which transform the historic street into a community space for meetings and discussions, which are among the most visible social consequences associated with the project.

To support destinations in their efforts to manage tourism in a balanced way, the Strategy proposes developing a common EU Toolbox for Balanced Tourism. The Toolbox will provide destinations with a practical set of measures, that can be tailored to their specifics and needs, helping to strike the equilibrium for the benefit of the host communities, the local business and visitors, while taking into account the environment. The Toolbox will be designed in consultation with the Member States and relevant tourism stakeholders. It will help destinations draw on established expertise, avoid "reinventing the wheel" and move faster. The implementation of this Toolbox will be supported by the EU Model for Tourism Management, the EU Tourism Alliance, the EU Tourism Observatory, the EU Tourism Academy, sustainable connectivity measures and the Destination Europe Framework.

One of the most visible social consequences associated with unbalanced tourism is growing pressure on housing in certain destinations. Although STRs account only for 1.2% of the EU housing stock,[246] certain neighbourhoods, especially in cities and popular tourist areas, face acute affordability pressures where limited housing supply - combined with other factors, including the presence of short-term rentals in some specific areas. Short-term rentals offer clear benefits, including greater choice for travellers, additional income for hosts, incentives for renovation, and wider economic gains for tourism and jobs. It also helps creates tourism capacity where otherwise it would be difficult, such as in remote rural areas. To help balance these benefits and risks, the Regulation on Short-Term Rentals[247], applicable from 20 May 2026, improves transparency through compulsory host registration and data sharing, enabling public authorities to regulate the market proportionately and address negative impacts more effectively. Furthermore, the Commission proposal for an Affordable Housing Act[248], which forms part of the implementation of the European Affordable Housing Plan[249], aims to help local authorities and Member States protect housing affordability and availability in areas facing the greatest pressures. The proposed Regulation builds on existing Union law to provide clearer, more operational conditions for assessing certain housing-related restrictions, while preserving national, regional and local housing policy choices. The tourism management tools envisaged in this Strategy would complement that framework by helping destinations address wider tourism pressures and their effects on residents and the environment.

[246] Batista e Silva, F., Curtale, R., Ribeiro Barranco, R., Marconi, M. and Tucci, M., Place-based determinants of housing prices in Europe (2025), accessed November 2026.
[247] European Parliament and Council of the European Union, Regulation (EU) 2024/1028 on Data Collection and Sharing Relating to Short-Term Accommodation Rental Services, Official Journal of the European Union, April 2024.
[248] European Commission, Affordable Housing Act, accessed November 2026.
[249] European Commission, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: The European Affordable Housing Plan, COM°(2025)°1025 final, accompanying SWD°(2025)°1053 final, December 2025.

Cruise tourism and maritime transport

Balanced tourism also requires better management of transport-intensive forms of tourism, particularly cruise tourism, where close cooperation between destinations, ports and cruise operators is essential to manage visitor flows, reduce negative environmental impacts and maximise (economic) benefits for host communities.

The Toolbox on balanced tourism will provide best practices and recommendations in this area, building on the *Good Practices for Sustainable Cruise Tourism*[250] and on existing cooperation mechanisms in place between destinations, port authorities and cruise lines to better manage tourism flows. The Commission's assessment of the sustainability of cruise tourism revealed that sustainability gains can mainly be achieved by improving cooperation between stakeholders[251], addressing issues such as the effective management of tourism flows (overtourism), emissions at ports (air quality, noise and climate), connectivity of peripheral coastal communities and islands, economic and social inclusion of destinations, and environmental sustainability (waste, water).

Example: Equipping ships to connect to shoreside electricity – Cruise Lines International Association (CLIA)[252]

All CLIA member ocean cruise lines have made a commitment that all ships calling at ports capable of providing shoreside power are anticipated to be equipped to either use shoreside electricity by 2035 or to be able to use alternative low carbon technologies, as available, to reduce emissions in port.

As part of the EU's Fit for 55 legislative package, qualifying TEN-T maritime ports must provide shoreside electricity by the end of 2029, in accordance with Regulation (EU) 2023/1804[253], which will further drive investment in port infrastructure. At the same time, the sustainability of the waterborne tourism sector requires closer cooperation between destinations, ports and the cruise industry, supported by appropriate infrastructure investments. This aligns with the aims of the Islands and Coastal Communities strategies, the EU Ports Strategy, the EU Industrial Maritime Strategy, and the European Ocean Pact[254]. To mitigate localised pressures on major port cities, structured dialogue between port authorities, municipal authorities and cruise lines should promote itinerary diversification and seasonal dispersal, directing visitor flows towards secondary coastal destinations and regional maritime areas, where appropriate and taking account of local infrastructure and environmental capacity.

[250] European Commission, Directorate-General for Maritime Affairs and Fisheries, Good Practices for Sustainable Cruise Tourism, accessed November 2026.
[251] European Commission: Directorate-General for Maritime Affairs and Fisheries, Deloitte Consulting B.V. and Ramboll Management Consulting, Good Practices for Sustainable Cruise Tourism – Final Report, Publications Office of the European Union, February 2023.
[252] Cruise Lines International Association (CLIA) Europe, Shore-Side Electricity Capability, accessed November 2026.
[253] Regulation (EU) 2023/1804 on the Deployment of Alternative Fuels Infrastructure, Official Journal of the European Union, September 2023.
[254] European Commission, Directorate-General for Mobility and Transport, EU Ports and Industrial Maritime Strategies, accessed November 2026; European Commission, Commission Presents First-Ever EU Strategies for Islands and Coastal Communities, press release, June 2026; European Commission, Directorate-General for Maritime Affairs and Fisheries, European Ocean Pact, accessed October 2026.

Beyond cruise tourism, decarbonising and modernising passenger ferry networks is equally important for island and coastal regions, helping ensure reliable, low-emission connectivity while supporting year-round tourism and strengthening territorial cohesion.

Example: Cross-border intermodal cooperation in the Adriatic (CROSSCONNECT)[255]

Passenger connectivity in the Adriatic is constrained by the limited integration of port, airport and urban transport systems, which lengthens transfer times and concentrates pressure on access infrastructure during the summer peak. The CROSSCONNECT project (Cross-border Coordinated Sea-Land Approach Interconnecting Ports of the Adriatic Sea with Airports and Urban Areas), funded under the Interreg Italy-Croatia Programme 2021-2027, addressed this gap by testing coordinated, ICT-based intermodal solutions across four metropolitan areas: Venice, Pula, Dubrovnik and Bari-Brindisi.

The project ran from March 2024 to April 2026, with a budget of EUR 2.09 million and eight port, airport and urban-transport partners. It applied two connection models. In Venice and Dubrovnik, a port-airport model integrated passenger information and baggage handling between cruise terminals and airports; the Dubrovnik pilot added electric baggage transfer and accessibility services for passengers with reduced mobility. In Pula and Brindisi, a port-urban model introduced electric port-to-city bus links and smart ticketing in Pula, and real-time passenger information across port, airport and city nodes in Brindisi. On the partners' own assessment, the pilots reduced passenger processing times, lowered transport emissions and improved first and last-mile access.

The tested solutions were consolidated into a Strategic Roadmap for transferable intermodal connections, presented at the Adriatic Sea Forum in June 2026. CROSSCONNECT illustrates the coordinated, cross-border integration of transport modes that the Strategy addresses, supported by shared data standards and low-emission infrastructure and designed for replication at other nodes.

Authenticity, cultural heritage and local identity

Promoting balanced and community-centred tourism also means strengthening the distinctive cultural and natural assets that make destinations attractive beyond Europe's traditional tourism hotspots. The enduring appeal of European tourism lies in the authenticity and richness of its culture, experiences and living traditions. Rural tourism and gastronomy connect visitors with local food traditions, landscapes and producers, creating economic opportunities while preserving cultural heritage and rural livelihoods. Geographical Indications (GIs) link products to their geographical origin and can help preserve cultural and gastronomic heritage, promote rural tourism and strengthen local identity and economies[256]. Authenticity also extends to Europe’s artisanal traditions, where craftsmanship passed down through generations supports local employment, preserves cultural identity and enriches the visitor experience. Preserving this authenticity also requires involving local communities in tourism development and ensuring that cultural traditions are not reduced to commercial attractions.

Europe’s built heritage, historic towns and villages, industrial heritage and network of heritage railways provide high-value tourism experiences that diversify tourism offers, spread economic benefits to rural and peripheral regions and help safeguard cultural assets for future generations.

[255] Dubrovnik Airport, CROSSCONNECT: Cross-border Coordinated Sea-Land Approach Interconnecting Ports of the Adriatic Sea with Airports and Urban Areas, accessed November 2026.
[256] European Commission, Geographical Indications and Quality Schemes, accessed November 2026.

Europe's linguistic diversity is another defining feature of its tourism offer. Languages are an essential part of local identity and cultural heritage, enriching visitor experiences, strengthening cultural understanding and supporting authentic exchanges between visitors and host communities.

Numerous examples of successful initiatives illustrate the importance of maintaining and further exploring authentic tourism offers. The forthcoming EU AI Strategy for the Cultural and Creative Sectors could also offer opportunities to strengthen links between culture and tourism, particularly through digital skills, access to digitised cultural heritage and the responsible use of AI-generated content, while safeguarding cultural authenticity[257].

Examples:

Mountain trails and huts - Europe's network of mountain trails and huts illustrates how tourism can combine cultural heritage, active mobility, public health, nature conservation and rural development. Maintained largely through the work of mountaineering associations and volunteers, these networks connect landscapes, communities and destinations across borders, while enabling low-impact tourism and helping distribute visitor flows beyond traditional hotspots. They also play an important role in preserving mountain heritage, supporting local economies and strengthening the resilience of mountain destinations in the face of climate change. The Joint Charter on European Hiking and Mountain Trails, developed by the European Mountaineering Association (EUMA) and the European Hiking Federation (ERA), recognises trails as public goods and highlights their contribution to accessibility, sustainable tourism, public health, territorial cohesion and cultural exchange[258].

Beer tourism, Belgium - Beer tourism illustrates how a place-based product can knit together an entire destination around authenticity rather than isolated attractions. In Bruges, Belgium, the last active historic brewery, De Halve Maan, keeps industrial heritage genuinely alive in the city centre, pairing brewery visits with its underground beer pipeline to sustain an interactive year-round attraction. Beyond the capital, the Toer de Geuze[259] initiative draws roughly 30,000 visitors, over 40% from abroad, into the rural Pajottenland and Zenne Valley every two years, when fourteen traditional lambic breweries and gueuze blenders open their doors and generate overnight stays, cycling trips and public-transport journeys that spread tourism revenue into small family breweries and village hospitality. In West Flanders, the historic Hop Region links breweries, hop museums, agricultural tourism and cycling routes so that visitors encounter the crop, the craft and the community together. In the Ardennes, the Trappist Trail[260] connects three internationally renowned abbey breweries through multi-day walking and cycling itineraries that anchor rural destination development in village accommodation and regional producers. These examples show that beer tourism makes visible existing heritage (brewing traditions recognised by UNESCO, monastery routes, hop-growing landscapes), rooted in craftsmanship, agriculture and community rather than a manufactured attraction.

[257] European Commission, Culture Compass for Europe, Commission Communication, section 5.1 and Annex (Flagship Action 10: AI Strategy for the Cultural and Creative Sectors, Q1 2027), November 2025.
[258] European Mountaineers, Official Website, accessed November 2026.
[259] Toer de Geuze, Official Website, accessed November 2026.
[260] European Federal Public Service Foreign Affairs, Foreign Trade and Development Cooperation, The Trappist Trail: Hiking and Tasting, Focus on Belgium, October 2017.

Trail of Women, Kraków, Poland - Kraków's inclusive approach to cultural heritage embraces social awareness and the recognition of historically underrepresented groups. A notable example is the city's initiative to highlight the role of women in shaping Kraków's identity through the creation of the 'Trail of Women of Kraków'[261]. This thematic tourist route spans several key districts of the city, including the Old Town, Kazimierz, Podgórze, and Nowa Huta, guiding visitors through sites associated with influential women who have contributed to Kraków's cultural, scientific, political, and social life. The trail not only brings attention to lesser-known historical narratives but also encourages reflection on the impact of women in both past and present-day Kraków. To promote the initiative and engage the public, the city organises a dedicated series of events each March, known as Women of Kraków Month. This programme includes guided walks, educational workshops, lectures, and community activities designed to deepen the understanding of women's roles in the city's history and to inspire dialogue about equality and representation.

Pilgrimage routes and trains, Italy - Trenitalia, a member of the Italian Ferrovie dello Stato Group, launched a partnership with the European Association of the Via Francigena Ways, Regionale and Trenitalia Tper offering discounts for travellers walking, cycling, or riding the historic pilgrimage route Via Francigena, with fare reductions and loyalty points for individual travellers and a 20% discount for groups of at least ten people, while pilgrims can have their credential stamped at Trenitalia ticket offices, linking the rail journey directly to a certified cultural-heritage itinerary. In parallel, Trenitalia's Intercity division has curated a network of cycling itineraries,[262] such as the roughly 1,300-kilometer Adriatic cycle route from Trieste to Santa Maria di Leuca crossing seven regions, and routes through the Ligurian Riviera dei Fiori, the Salento coast, Lazio, Friuli-Venezia Giulia, Calabria, and Sicily, each explicitly designed to begin and end at rail stations and to connect with train-plus-bicycle travel solutions, effectively turning intercity trains into the backbone of a national slow-tourism network. Together, these partnerships show that high-speed and regional rail generate their fullest value not simply by moving passengers quickly, but by functioning as the connective infrastructure of an integrated tourism ecosystem, binding together heritage associations, regional transport operators, protected-area authorities, and local hospitality networks into a single, bookable customer journey.

Les Routes du Comté, France - Les Routes du Comté is a tourism network built around Comté cheese, a product protected by a Geographical Indication (GI). It brings together farms, cheese dairies and ageing cellars, alongside outdoor activities that allow visitors to discover the region's landscapes and agricultural traditions. The network also includes local shops, restaurants and other opportunities to discover regional products. By connecting food production, cultural heritage and tourism, the initiative helps diversify the rural tourism offer and creates opportunities for local producers and businesses[263].

Accessibility

Sustainable tourism can only achieve its full impact when it is inclusive and accessible. In this context, accessibility refers to ensuring that tourism destinations, services and experiences can be accessed and enjoyed by everyone, regardless of age, disability or other access requirements. It encompasses the entire tourism journey, including transport, accommodation, attractions,

[261] City of Kraków, "Krakowianki", Kraków dla Równości, January 2025.
[262] Trenitalia, "Ciclovie italiane: viaggia con Intercity e scopri i percorsi in bicicletta", Intercity – Consigli di viaggio, accessed November 2026.
[263] Jura Tourisme, "Les Routes du Comté", accessed November 2026.

information and digital services, and aims to enable all visitors to travel independently, safely and with dignity. This approach is consistent with the European Accessibility Act[264] and the UN Convention on the Rights of Persons with Disabilities[265].

The potential beneficiaries of improved tourism accessibility represent a substantial share of the European population. In 2024, 23.9% of people aged 16 years or over in the EU reported some or severe long-standing limitation in their usual activities due to health problems. Accessibility needs are also expected to become increasingly important as the EU population ages, with nearly one in three EU residents projected to be aged 65 or over by 2050.[266]

Barrier-free accessibility needs to be addressed both at destination level and throughout the travel journey, including through seamless assistance and step-free intermodal travel chains from origin to destination, to guarantee equal access to tourism for persons with disabilities and persons with reduced mobility. At the same time, applying Design for All principles across destinations benefits a much wider range of visitors, including older travellers and families with young children, while helping destinations tap into the growing opportunities of the silver economy, supporting year-round tourism and contributing to reduced seasonality[267].

Examples:

Tampere, Finland - The 2026 European Capital of Smart Tourism, Tampere (Finland), is investing in accessible nature tourism, reflecting the importance of lakes and nature tourism to residents and visitors[268]. The city ensures that nature attractions are easily reachable by public transport and accessible to everyone. In 2024, Tampere opened its first accessible beach at Lake Pyhäjärvi, featuring a gentle ramp into the lake, handrails, accessible changing facilities and information in Braille. Further initiatives include barrier-free routes, such as in the Kintulammi camping area, accessible route information on the outdoorstampere.fi website, and Outdoor Express[269], a shuttle bus service connecting Tampere with nearby national parks. Together, these measures illustrate how accessibility can be integrated across infrastructure, information and transport to broaden access to nature-based tourism.

Szczecin, Poland - The city of Szczecin, in Poland, pays particular attention to its senior residents and visitors, with several initiatives focusing on this social group.[270] The Szczecin Senior Card allows seniors to access cultural institutions and rehabilitation or wellness treatment services at lower costs or free of charge. The dedicated Senior Centre serves as a community integration space, providing information about senior-related activities in the city and promoting engagement among the senior community. The city has also established a Municipal Senior Council, which helps to shape activities for seniors based on the needs of senior residents. Organisations that support seniors can be found on the Senior Map of Szczecin. Together, these initiatives illustrate how destinations can adapt services and

[264] European Parliament and Council of the European Union, Directive (EU) 2019/882 on the Accessibility Requirements for Products and Services, Official Journal of the European Union, June 2019
[265] United Nations Department of Economic and Social Affairs (UN DESA), "Convention on the Rights of Persons with Disabilities (CRPD)", Division for Inclusive Social Development, accessed November 2026.
[266] Eurostat, "Population with Disability", Statistics Explained, May 2026; Eurostat, "Population Projections in the EU", Statistics Explained, accessed November 2026.
[267] Simonas Gaušas et al., Research for TRAN Committee: Role of the Longevity Economy in the Tourism Sector, European Parliament, Policy Department for Transport, Employment and Social Affairs, January 2025.
[268] Ekokumppanit, "Accessible Destinations", Outdoor Tampere, accessed November 2026.
[269] EcoFellows Ltd, "Outdoor Express – Your Ticket to Nature", Outdoor Express, accessed November 2026.
[270] City of Szczecin, "Seniorzy", Szczecin – Official City Website, accessed November 2026.

experiences to an ageing population while promoting social participation and supporting the silver economy.

Romagna Faetina, Italy - With the support and knowledge received under the Interreg Europe project "SILVER UP"[271], is developing accessible, age-friendly tourism services with a focus on cultural heritage, gastronomy, nature and wellness, including with available ERDF resources as part of the sustainable urban development strategy. To better ensure a more targeted and effective support, the municipality is involving older residents, local organisations and tourism operators in the design of cultural tourism, wellness packages, and the promotion of the destination. Through this approach, not only can Romagna Faetina extend the tourism season and strengthen the local economy, but it can better coordinate tourism, mobility, and social services.

For more ERDF project examples, see the Kohesio Database[272].

3.2.3 Environmental transition and regenerative tourism

Alongside balanced visitor management, achieving a sustainable tourism ecosystem requires significant efforts in reducing the environmental footprint and going a step further by restoring the natural ecosystems and communities. Accelerating the green transition of European tourism requires integrating transport and other tourism industry decarbonisation, climate adaptation and ecosystem protection into destination management.

The environmental footprint of tourism is multi-dimensional, ranging from CO2 emissions to resource and energy consumption, pollution, water extraction, land use and overall impact on biodiversity, including on protected areas within the Natura 2000 network. The latest estimates available from the 2024 report of the European Monitor of Industrial Ecosystems[273] indicate that CO2 and particulate matter emissions from the tourism ecosystem have remained stable over time: in 2021 the tourism ecosystem accounted for around 10% of CO2 emissions, while emissions from consumption travel have risen as part of a broader post-pandemic recovery. Material extractions have been growing annually by an average of 5.5% from 2016 to 2022. Waste production remains a key concern, with beach waste in particular increasing over the years (median value for plastic items found per 100m on European beaches was 481 in 2022, compared to 121 in 2013). Land use measured in square kilometres is increasing, aligning with statistics showing a rise in European hotel construction projects, which saw a significant surge in 2024.

Tourism and recreational activities may also exert pressures on biodiversity. Based on the six-year reporting period under Article 17 of the Habitats Directives, tourism-related pressures account for 13% of all reported pressures on habitats and species[274]. Evidence from protected areas further shows that tourism and recreational activities can contribute to habitat degradation and species disturbance, displacement and changes in species composition, with sensitive

[271] Interreg Europe, Silver Tourism: a new opportunity for Romagna Faentina, accessed November 2026.
[272] European Commission, Kohesio: EU Cohesion Policy Projects, accessed November 2026.
[273] European Commission, European Innovation Council and SMEs Executive Agency, Technopolis Group, Izsak, K., Markianidou, P., Marinelli, E. et al., 'Monitoring Industrial Ecosystems – Tourism – Analytical Report – 2024 Edition', Publications Office of the European Union, May 2025.
[274] European Environment Agency, "Habitats and Species: Main Pressures and Threats", State of Nature in Europe: A Health Check, accessed November 2026.

plants, birds and mammals declining or disappearing from disturbed sites[275]. The result of the State of Nature reporting cycles, carried out pursuant to Article 12 and Article 17 of the Birds and Habitats Directives (BHD), highlighted the pressures affecting habitats and species protected within the Natura 2000 network. Among these pressures, poorly managed tourism visitor flows can contribute to habitat degradation, disturbance of species, pollution and the depletion of natural resources. This underlines the need for effective visitor management and sustainable tourism approaches that help prevent or minimise pressures on sensitive natural areas while supporting the conservation objectives of Natura 2000 sites.

The Commission's new guidance on Natura 2000 and sustainable tourism[276] provides a practical framework for addressing these challenges. The guidance emphasises the need to integrate tourism planning and visitor management into the overall management of Natura 2000 sites. It recognises that tourism can generate significant socio-economic benefits for local communities and regions, while also underlining that these benefits depend on maintaining the ecological assets on which nature-based tourism relies. It therefore calls for a more proactive and integrated approach to managing tourism pressures, based on understanding the specific vulnerabilities and carrying capacity of individual sites, monitoring visitor pressures and impacts, and engaging relevant stakeholders in the design and implementation of appropriate management measures. These may include measures to better distribute visitor flows in space and time, improve visitor information and awareness, and manage access and activities where necessary. The overall objective is to ensure that tourism development remains compatible with the conservation objectives of Natura 2000, while enabling destinations and local communities to benefit from the economic and social opportunities that sustainable tourism can provide.

Tourism businesses are investing in climate-positive measures. According to the same European Monitor of Industrial Ecosystems report, in 2024, 21% of companies in the tourism industrial ecosystem have adopted strategies for climate neutrality - over 70% reduced waste and saved energy, while more than 60% were saving water and materials. Despite the high share of companies taking action for the environment, there is an overall low level of investment into environmental technologies: 26% of tourism companies have opted not to invest in environmental technologies, and of the companies that do invest, nearly half (49%) allocate less than 5% of their annual revenue toward such initiatives.

In line with the Clean Industrial Deal and the Sustainable Transport Investment Plan (STIP), supporting the uptake of sustainable fuels across aviation and maritime transport alongside the rollout of electric vehicle charging infrastructure is essential to reduce the footprint of travel to and within destinations. Equally, local and regional authorities as well as companies and organisations active in the sector should implement sustainable urban mobility plans (in case of authorities) and management plans (in case of companies and organisations) and actions that promote low- and zero-emission means of mobility such as public transport, active mobility and shared mobility, in line with the EU Urban Mobility Framework[277]. EU institutions

[272] Tolvanen, A. and Kangas, K., "Tourism, Biodiversity and Protected Areas – Review from Northern Fennoscandia", Journal of Environmental Management, Vol. 169, 2016, pp. 58–66, accessed November 2026.
[273] European Commission, Directorate-General for Environment, "Staff Working Document on Natura 2000 and Sustainable Tourism", Publications Office of the European Union, July 2026.
[277] European Commission, The New EU Urban Mobility Framework, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, COM°(2021)°811 final, December 2021.

committed, in the European Declaration on Cycling[278], to creating favourable conditions to support cycling as a sustainable means of recreation and tourism. These efforts need to be complemented by measures that strengthen the resilience of destinations to climate change and support the restoration of natural ecosystems.

In this context, the Strategy builds on several EU initiatives. The European Ocean Pact (June 2025) is a comprehensive strategy to better protect the ocean, promote a thriving blue economy, including coastal and maritime tourism, and support the well-being of people living in coastal communities and areas. The Islands Strategy and the Coastal Communities Strategy (June 2026) work in tandem, reinforcing each other to address shared pressures while responding to the unique realities of islands and coastal communities alike.

Environmental transition and climate action

Climate change is already reshaping tourism patterns across Europe. JRC modelling indicates that these effects will become increasingly uneven as warming intensifies. Under higher warming scenarios, tourism demand in some regions of Cyprus, Greece, Spain, Italy and Portugal could decrease by more than 5%, while some northern European regions could experience increases of more than 5%. Southern coastal regions could lose nearly 10% of summer tourism demand under 3°C and 4°C warming scenarios, while demand is projected to increase during other parts of the year, illustrating a potential redistribution of tourism between both regions and seasons[279]. The underlying modelling also projects April demand increasing by up to 8.89% and July demand falling by up to 5.72% at EU level under the 4°C scenario.

Rising temperatures, changing snow conditions, water scarcity, coastal erosion, floods and wildfires are affecting destinations, tourism businesses and transport networks, with growing implications for the viability and competitiveness of tourism destinations, shifting seasonality and tourism flows. European tourism therefore needs to further reduce its environmental footprint while strengthening the resilience of destinations to climate change.

Climate change has been a priority for the tourism ecosystem since the Tourism Transition Pathway, which mobilised public and private stakeholders around the green transition and resilience, and was subsequently reflected in the European Agenda for Tourism 2030. The 2025 stocktaking of the Agenda found that, while important progress had been made on the green transition, the uptake of circular economy and resource-efficient practices needed to accelerate. Progress in supporting the green transition of tourism SMEs was assessed as moderate, with nearly half of Member States reporting relevant support measures, while further progress was identified as necessary in the uptake of tools such as the Product Environmental Footprint, EU Ecolabel and EMAS. It also identified climate adaptation as an area requiring further progress, with tourism policies and infrastructure not yet fully aligned with climate resilience objectives[280].

[278] European Parliament, Council of the European Union and European Commission, European Declaration on Cycling, OJ C, C/2024/2377, April 2024.
[279] European Commission, Joint Research Centre, Regional impact of climate change on European tourism demand, accessed November 2026.
[280] European Commission, Report from the Commission to the Council on the implementation of the European Tourism Agenda 2030, COM°(2025)°763 final, December 2025.

A cornerstone of this work is the new EU Framework for Climate Resilience[281], which will make Europe significantly better prepared for and more resilient to climate impacts. It sets the basis for systematic and anticipatory climate risk management across the EU by introducing the reference global warming trajectory, clarifying risk ownership, incorporating climate resilience in planning and decision making, improving risk assessments and strategic plans, strengthening investment, and providing enabling tools. It will empower all stakeholders to manage climate risks more effectively, leveraging the insights and experiences developed under the EU Mission on Adaptation to Climate Change[282] and existing knowledge and forecasting tools, including the Copernicus Climate Change Service[283] and Climate-ADAPT[284]. As part of this framework, the Commission will support Member States, destinations and tourism businesses by providing climate knowledge, science-based risk assessments and long-term forecasts to strengthen preparedness, adaptation and long-term destination planning.

Existing EU tools already support tourism businesses in measuring, managing and communicating their environmental performance. The EU Taxonomy provides a science-based classification system for environmentally sustainable economic activities. Under the environmental objective of protection and restoration of biodiversity and ecosystems, it includes specific technical screening criteria for substantial contribution and do no significant harm (DNSH) for hotels, holiday accommodation, camping grounds and similar accommodation[285]. The Sustainable Finance Taxonomy[286] sets out technical screening criteria for application to hotels, holiday, camping grounds and similar accommodation to establish if these activities provide a substantial contribution to protection and restoration of biodiversity and ecosystems. This includes requirements for contractual agreements to contribute to conservation or restoration measures, implementation of action plans for contributing to nature conservation, establishment of sustainable supply chain and environmental management systems, and requirements for environmental impact assessments and audits.

In order to potentially qualify for preferential financing and access to green bonds, economic operators in the sector must also meet the "do no significant harm" criteria in relation to climate change mitigation and adaptation, sustainable use and protection of water and marine resources transition to a circular economy and pollution prevention and control.

The EU Ecolabel provides a voluntary EU-wide certification scheme for tourist accommodation meeting defined environmental criteria, including on energy and water use, waste reduction and environmental management[287]. The Eco-Management and Audit Scheme (EMAS) provides organisations with a framework to assess, manage and continuously improve

[281] European Commission, Report from the Commission to the Council on the implementation of the European Tourism Agenda 2030, COM°(2025)°763 final, December 2025.
[282] European Commission, 'EU Mission: Adaptation to Climate Change', Directorate-General for Research and Innovation, accessed November 2026.
[283] Copernicus, 'Climate Change Service', accessed November 2026.
[284] European Environment Agency (EEA) and European Commission, 'Climate-ADAPT: European Climate Adaptation Platform', accessed November 2026.
[285] European Commission, Commission Delegated Regulation (EU) 2023/2486 of 27 June 2023, Annex IV, Section 2.1, 'Hotels, holiday, camping grounds and similar accommodation', OJ L, 2023/2486, June 2023.
[286] European Commission, Commission Delegated Regulation (EU) 2023/2486 of 27 June 2023, supplementing Regulation (EU) 2020/852 by establishing technical screening criteria for environmentally sustainable economic activities, OJ L, 2023/2486, June 2023.
[287] European Commission, EU Ecolabel, accessed November 2026.

their environmental performance, supported by verified environmental reporting[288]. The Product Environmental Footprint methodology complements these tools by providing a common approach to assessing the environmental footprint of products and organisations across their life cycle, with specific Product Environmental Footprint Category Rules (PEFCR) under development for hotel accommodation[289]. By December 2026, the pilot project developing PEFCR for hotel accommodations will provide a common, credible method to measure environmental footprint, identify and address the hotspots.

The Commission Recommendation on Water Efficiency First[290] and related actions under the European Water Resilience Strategy[291] support the tourism sector to contribute to the European Union's objective to increase water efficiency by 10% until 2030.

Public authorities can draw on the TAIEX EIR peer 2 peer tool, which facilitates exchanges of expertise and good practices between national, regional and local authorities on the implementation of EU environmental policy and legislation, including in areas relevant to sustainable tourism such as circular economy, waste and water management, biodiversity and green infrastructure[292].

Reducing the environmental footprint of tourism also requires accelerating the decarbonisation of transport, promoting active and shared mobility, improving energy efficiency and supporting low-emission tourism infrastructure. The integration of non-motorised transport routes, such as greenways and cycling routes, into the broader transport network, not only promotes the decarbonisation of transport and supports sustainable tourism by providing alternatives to overcrowded destinations and extending the tourism season but also contributes to the well-being of local communities.[293] Greenways also support territorial cohesion by improving connectivity between urban and rural areas, encouraging active mobility and creating new opportunities for nature-based and cultural tourism.

While climate adaptation requires long-term integration of climate risks into destination planning and investment, preparedness for and response to climate-related disruptions is addressed further in section 3.2.4 on tourism crisis preparedness and resilience.

Climate adaptation measures will be particularly relevant for coastal, island, mountain and nature-based destinations whose tourism offer is highly climate-dependent, as well as for tourism SMEs with more limited financial capacity to absorb or adapt to climate-related shocks[294]. For mountain destinations, declining snow reliability poses particular challenges for winter tourism. A study covering 2,234 ski resorts in 28 European countries found that, without artificial snowmaking, 53% would face very high snow-supply risk at 2°C of global warming. While artificial snowmaking can mitigate some of these risks, it also increases water and energy

[288] European Commission, 'Eco-Management and Audit Scheme (EMAS)', accessed November 2026.
[289] PEF Hotel Accommodation, 'The Product Environmental Footprint Category Rules (PEFCR) for Hotel Accommodation Services', accessed November 2026.
[290] European Commission, Commission Recommendation (EU) 2025/1179 of 4 June 2025 on guiding principles of water efficiency first, June 2025.
[291] European Commission, 'Water Resilience Strategy', accessed November 2026.
[292] European Commission, 'TAIEX-EIR PEER 2 PEER Tool', accessed November 2026.
[293] European Greenways Association (EGWA), European Greenways Association, accessed November 2026.
[294] OECD, OECD Tourism Trends and Policies 2026, Chapter 4, 'Adapting tourism to extreme weather-related events', OECD Publishing, Paris, March 2026.

demand, highlighting the importance of climate adaptation measures that take account of local environmental constraints and the long-term viability of tourism activities[295].

Examples

Lithuania: energy and transport decarbonisation - Tauragė, in Lithuania, is a national frontrunner in the sector of energy. 99% of the district's heating is generated from biomass, and 25 public institutions operate photovoltaic solar panels. In 2019, the city used an ESCO model to replace 3,500 streetlights with smart LED systems, saving around 50% in electricity consumption. Public institutions are gradually switching to heat pumps, and the city provides financial incentives to residents who replace outdated heating systems with sustainable alternatives. Tauragė is home to Lithuania's most advanced electric public transport system. All buses are fully electric and an annual pass costs only €12, making climate-friendly travel accessible to all social groups of residents and visitors[296].

Austria: Ecolabel for tourism destinations[297] - In 2022, Austria created a new national ecolabel on tourism destination level, in addition to the existing ecolabels for businesses. It was implemented to accelerate the green transition, improve regional value chains and respond to the increasing demand for sustainable holidays.

A key requirement is the cooperation by destination management organisation with political actors and local tourism enterprises as well as sufficient financial, personnel and time resources for implementation. The ecolabel criteria were developed in a comprehensive discussion process with relevant stakeholders and experts from the tourism sector, including 19 pilot destinations, and are based on the European Tourism Indicator System and the internationally recognised criteria of the Global Sustainable Tourism Council. They further comply with EN ISO 14024. The label comprises a comprehensive set of 63 mandatory and 56 optional criteria, the latter based on a scoring system with a minimum number of points to be achieved at the time the application is submitted.

As of October 2026, 21 destinations in Austria have already been awarded with the Ecolabel for Tourism Destinations.

Greece: climate adaptation and nature-based solutions - The Gouras Stream Management project[298] in Igoumenitsa, Greece, focuses on the protection and restoration of local waterways. By implementing flood control measures, riverbank reinforcement and ecological restoration, the project safeguards water quality, reduces erosion, and protects habitats of native flora and fauna. This intervention also enhances the surrounding landscape, providing safe and accessible spaces for recreation and eco-tourism.

Ireland: active mobility and circularity - The Great Western Greenway Cycling & Walking Trail, developed by Mayo County Council, Ireland, is a 48.5-kilometre coastal walking and cycling trail along the Wild Atlantic Way, which is built on a disused railway line and

[295] François, H., Samacoïts, R., Bird, D.N. et al., 'Climate change exacerbates snow-water-energy challenges for European ski tourism', Nature Climate Change, 13, 935–942, September 2023.
[296] European Commission, Directorate-General for Mobility and Transport, Leading Examples of Smart and Sustainable Tourism Practices in Europe, accessed November 2026.
[297] The Austrian Ecolabel, 'Tourism Destinations', accessed November 2026.
[298] Municipality of Igoumenitsa, 'Έργα διευθέτησης ρέματος Γκούρας' [Gouras Stream Regulation Works], press release, August 2023.

exemplifies sustainable infrastructure by repurposing existing corridors with minimal environmental impact. The trail includes Ireland's widest boardwalk, constructed over undisturbed bogland, preserving sensitive habitats and supporting biodiversity. Environmental innovation is central to the initiative, with features such as solar-powered compactor bins, e-bike charging stations, and public furniture made from repurposed wind turbine blades, demonstrating circular economy principles in practice[299].

Regenerative tourism

Beyond mitigation of tourism impacts on the environment, regenerative tourism goes a step further and complements sustainability goals. It uses policy, technical tools and business decisions not only to minimise negative impacts, but to actively restore ecosystems, strengthen local communities and create long-term economic value, ensuring that tourism contributes positively to environmental health, social well-being and territorial resilience.

This approach was explored by the T4T Expert Group through a dedicated webinar on sustainable destination management and regenerative tourism. Discussions highlighted the potential for tourism to contribute not only to ecosystem and biodiversity restoration, but also to community revitalisation and the preservation of cultural heritage. They also emphasised the importance of long-term planning, community participation and cooperation between tourism businesses, public authorities, local communities and visitors in moving from reducing negative impacts towards creating positive value for destinations[300]. Furthermore, the T4T Expert Group provided the Commission with recommendations to support regenerative tourism.

Nature-positive tourism is one practical expression of this regenerative approach. The Commission promotes Natura 2000 as a distinctive asset for destination development, positioning the network as a flagship of Europe's sustainable and nature-based tourism offer. As the world's largest coordinated network of protected areas, Natura 2000 offers unique opportunities to develop high-quality nature-based and low-impact tourism experiences that contribute to biodiversity conservation while generating economic and social benefits for local communities. In cooperation with Destination Management Organisations, competent authorities for protected areas and local stakeholders, the Commission will continue to support the development of sustainable visitor experiences, including hiking, cycling, wildlife observation and cultural heritage activities, in line with conservation objectives of Natura 2000. This approach will help destinations build their identity and attractiveness around their natural and cultural assets, while ensuring that increased visibility and visitor demand are accompanied by appropriate visitor management and measures to safeguard the ecological values on which their long-term attractiveness depends.

The Staff Working Document on *Natura 2000 and sustainable tourism* provides illustrative examples and a methodological framework to support the development and management of sustainable tourism and recreational activities within and around Natura 2000 sites[301]. It also explains how such activities relate to the sites' conservation objectives and highlights the flexibilities provided by the EU legal framework. When appropriately managed, sustainable

[299] Mayo County Council, 'The Great Western Greenway', accessed November 2026.
[300] T4T Expert Group, Sustainable Destination Management and Regenerative Tourism, accessed November 2026.
[301] European Commission, Directorate-General for Environment, Staff Working Document on Natura 2000 and Sustainable Tourism, Publications Office of the European Union, July 2026.

tourism can also contribute to ecosystem restoration and help raise awareness among visitors and local communities of the importance of nature. It can demonstrate that preserving and enhancing the natural environment contributes to maintaining quality of life.

Examples:

Ibiza, Spain - The Posidonia Oceanica meadows in Ibiza, Spain, are essential for water clarity, oxygen production, and carbon sequestration. Ibiza has launched awareness campaigns, such as the 'Viu la Posidònia', to educate residents and tourists about its importance, fostering active community participation in conservation. The island employs targeted measures such as ecological buoys to prevent anchoring damages in sensitive marine areas, notably in the Talamanca Bay. It has also pioneered a five-year marine restoration project focused on regenerating Posidonia meadows, involving scientific research, government agencies and citizens[302].

Jelgava, Latvia - The city of Jelgava, in Latvia, features over 390 hectares of maintained parks, a Natura 2000 site (Lielupe floodplain meadows), and urban forests that support biodiversity and provide recreational opportunities for residents and visitors alike. To protect and maintain these sites, the city implements different solutions. The Natura 2000 zones are maintained with smart visitor flow monitoring during sensitive periods (e.g., bird nesting). The Pasta Island and Svēte meadows have been revitalised for public use and feature walkways, pastures and educational signage. Nature protection and tourism is part of the Jelgava Technical School education programme, with students conducting local research on eco-tourism potential in the city and the region[303].

European Charter for Sustainable Tourism in Protected Areas of the EUROPARC Federation provides a practical management tool enabling protected areas, their communities and businesses develop tourism sustainably. The Charter promotes a careful tourism planning in protected areas and a shared, territory-wide strategy developed through a participatory approach. Growing since 2001, the Charter gathers a network of 91 protected areas in 13 countries with 1500 sustainable partners and 41 tour operators[304].

Smart, green and resilient marinas

Transforming marinas into smart, green hubs is essential to support the sustainable development of yachting and nautical tourism. This requires an integrated management model aimed at accelerating investments in alternative fuel infrastructure, onshore power supply, digital management tools, circular waste solutions and eco-friendly mooring systems, alongside the development of a European digital platform for berthing availability. By utilising shared data for real-time berthing optimisation, this framework could improve berth allocation, help balance seasonal tourist flows and reduce pressures on vulnerable coastal areas, particularly in the highly strained Mediterranean basin, including pressures on local electricity grids, freshwater resources and Marine Protected Areas. In full alignment with the principle of territorial cohesion, this framework will also take into account insular specificities by

[302] Ibiza Preservation, Marine Protection, accessed November 2026.
[303] Nature Conservation Agency of Latvia, https://www.daba.gov.lv/en, accessed November 2026.
[304] EUROPARC Federation, European Charter for Sustainable Tourism in Protected Areas, accessed November 2026.

unlocking dedicated financial pathways to help scattered island archipelagos modernise their marina networks without placing an undue burden on small island economies.

3.2.4 Crisis preparedness and resilience

Tourism is increasingly exposed to disruptions originating outside the sector, including geopolitical crises, extreme weather events, transport disruptions, cyber incidents and public health emergencies. As tourism depends on complex and interconnected transport, accommodation and service networks, disruptions can rapidly affect destinations, businesses and travellers across borders. Recent crises have also highlighted the need for timely information, coordinated communication and greater preparedness across the tourism ecosystem.

The impacts of such disruptions are particularly acute for tourism SMEs and destinations that depend heavily on seasonal revenues, a limited number of source markets or climate-sensitive tourism products. High seasonal and geographical concentration can further increase exposure by making local tourism economies dependent on relatively short periods of activity or a limited number of visitor flows[305].

The COVID-19 pandemic demonstrated the scale of the economic and operational consequences that a systemic crisis can have for tourism[306], with uneven impacts at regional level.[307] Russia's war of aggression against Ukraine has subsequently shown that, beyond the destruction of tourism infrastructure and cultural assets, geopolitical insecurity can have prolonged and geographically uneven consequences. Tourism destinations in EU regions bordering Russia, Belarus and Ukraine have reported declining visitor flows, weakened investor and traveller confidence, increased operational uncertainty and more limited access to finance, with particularly severe effects on SMEs that depend on seasonal revenues. These developments form part of the wider socio-economic challenges facing the EU's eastern border regions, which are addressed in the Commission Communication *Strong regions for a safe Europe*, setting out measures to strengthen security, connectivity, economic resilience and the long-term attractiveness of these regions.[308] This is complemented by the EastInvest Facility, launched by international financial institutions and national promotional banks to facilitate access to financing and advisory services for businesses and investment projects in the eastern border regions, thereby supporting their longer-term economic resilience and adaptation to the changed geopolitical environment.[309]

The consequences of the war have also extended beyond the Eastern border regions. Changes in transport connectivity and airspace use, higher energy and operating costs, displacement and

[305] OECD, OECD Tourism Trends and Policies 2026, Chapter 1, 'Tourism trends, performance and outlook', and Chapter 4, 'Adapting tourism to extreme weather-related events', OECD Publishing, Paris, July 2026.
[306] Eurostat, Tourism Satellite Accounts in Europe – 2023 edition, Publications Office of the European Union, Chapter 8, "Insights on the impact of the COVID-19 pandemic on the tourism sector", pp. 31–35, accessed April 2023.
[307] Curtale, R., Batista e Silva, F., Proietti, P. and Ribeiro Barranco, R., "Impact of COVID-19 on tourism demand in European regions – An analysis of the factors affecting loss in number of guest nights", Annals of Tourism Research Empirical Insights, ISSN 2666-9579, 4(2), 2023, article 100112, JRC130009, November 2023.
[308] European Commission, Communication on the EU's eastern regions bordering Russia, Belarus and Ukraine: Strong regions for a safe Europe, COM°(2026)°82 final, February 2026.
[309] European Investment Bank (EIB) Group, "New platform to boost support for EU regions most affected by the war in Ukraine", February 2026.

changing travel perceptions have affected destinations and tourism businesses across Europe. At the same time, the response has illustrated the role that tourism-related infrastructure, accommodation providers, transport operators and local communities can play in supporting displaced persons and wider crisis-response efforts.

Responses to the consultation highlighted crisis preparedness as a growing priority. Stakeholders called for improved communication channels, better access to reliable information, stronger coordination between public authorities and industry, and practical mechanisms to exchange good practices and lessons learnt during and after crises. They also emphasised that resilience depends not only on responding effectively once crises occur, but also on anticipating risks, strengthening preparedness and improving coordination across the tourism ecosystem. In this context, preparedness needs to cover the full crisis cycle, including risk assessment, prevention, contingency planning, immediate response, business continuity and recovery.

Existing EU preparedness and response framework

Crisis management remains primarily a national responsibility. However, a substantial EU framework supports Member States in anticipating, preparing for and responding to cross-border and large-scale emergencies. Together, these instruments provide an important foundation for strengthening the resilience of the tourism ecosystem. The Preparedness Union Strategy promotes an integrated all-hazards and whole-of-society approach to anticipating, preventing and responding to crises, covering risks ranging from geopolitical conflict and cyber threats to climate-related disasters and health emergencies[310]. It includes measures to improve early warning systems, increase risk awareness, promote at least 72 hours of household self-sufficiency, integrate preparedness into education and ensure disability-inclusive emergency preparedness. These measures are particularly relevant to tourism and business travel, where visitors may be unfamiliar with local risks, emergency procedures and official information channels.

Building on these measures, tourism destinations and operators can play an important role in ensuring that visitors know how to access official warnings, contact emergency services through 112, and follow evacuation or shelter-in-place instructions, while preparing their own staff, emergency plans, communication arrangements and essential supplies to support visitors during disruptions. Strengthening cooperation between tourism stakeholders, local authorities and civil protection services is therefore essential to translate population preparedness into practical measures that protect visitors and reinforce the resilience of European tourism. The Union Civil Protection Knowledge Network can further support these efforts by facilitating the exchange of knowledge, good practices and lessons learned from projects funded under the Union Civil Protection Mechanism, including those addressing tourism-related risks.

In the context of wildfires, the Commission Communication on integrated wildfire risk management encourages Member States to strengthen cooperation between tourism stakeholders, farmers, foresters, local authorities and fire safety experts to raise visitors' risk awareness.[311] Stronger cooperation between tourism operators, destination authorities and civil

[310] European Commission, EU Preparedness Union Strategy, March 2025.
[311] European Commission, Communication on Integrated Wildfire Risk Management, COM(2026) 330 final, March 2026.

protection services can help ensure that visitors, who may be unfamiliar with local risks and procedures, receive timely information and appropriate assistance during emergencies.

Several horizontal EU mechanisms and instruments are directly relevant to the resilience of the tourism ecosystem:

- The **Union Civil Protection Mechanism** strengthens cooperation between Member States and participating states in disaster prevention, preparedness and response. When activated, the Emergency Response Coordination Centre coordinates offers of assistance, expertise, transport and logistical support. The Mechanism can also support consular evacuation operations, including by facilitating transport arrangements serving citizens of several Member States.[312]
- The **Transport Contingency Plan** provides a toolbox for responding to crises affecting passenger and freight transport and seeks to preserve connectivity, passenger protection and the functioning of the Single Market during transport emergencies.[313]
- The **Internal Market Emergency and Resilience Act**, applicable since 29 May 2026, establishes a horizontal framework to improve preparedness, coordination and information exchange and to safeguard the free movement of goods, services and persons during major Single Market disruptions where no more specific sectoral framework applies.[314]
- **EU early-warning, monitoring and knowledge tools**, including the Copernicus Emergency Management Service, the European Flood Awareness System, the European Forest Fire Information System, Climate-ADAPT, the European Climate and Health Observatory and the Union Civil Protection Knowledge Network, provide risk information, forecasting, mapping, guidance and opportunities for peer learning that can support tourism authorities and destinations in their preparedness planning.[315]
- The **EU Tourism Data Space**, the **EU Tourism Dashboard** and **market intelligence** produced by the European Travel Commission can complement operational crisis information by improving access to timely, interoperable tourism data and helping authorities assess changes in tourism performance, connectivity, demand and destination-level impacts.[316]
- The **European Solidarity Corps** can contribute to the recovery and resilience of destinations and communities affected by natural disasters and other crises, through volunteering activities supporting community recovery, environmental restoration and local resilience. Such activities can complement wider recovery measures while creating opportunities for young people to discover and engage with affected destinations and their communities, including beyond established tourism circuits,

[312] European Commission, EU Civil Protection Mechanism, accessed November 2026.
[313] European Commission, Communication on a contingency plan for transport, COM(2022) 211 final, May 2022.
[314] European Commission, Internal Market Emergency and Resilience Act, October 2024.
[315] European Commission, Copernicus Emergency Management Service; European Commission, European Flood Awareness System (EFAS), Copernicus Emergency Management Service; European Commission, European Forest Fire Information System (EFFIS), Copernicus Emergency Management Service; European Commission and European Environment Agency, European Climate Adaptation Platform (Climate-ADAPT); European Environment Agency and European Commission, European Climate and Health Observatory; European Commission, EU Civil Protection Knowledge Network, all accessed November 2026.
[316]European Commission, Communication: Towards a Common European Tourism Data Space: boosting data sharing and innovation across the tourism ecosystem, 2023/C 263/01, July 2023; European Commission, EU Tourism Dashboard, accessed November 2026; European Travel Commission (ETC), official website, accessed November 2026.

fostering exchanges with local populations and stronger awareness of Europe's territorial and cultural diversity.[317]

These horizontal structures are complemented by sector-specific protections for travellers. Directive (EU) 2015/2302 on package travel establishes rights and obligations where unavoidable and extraordinary circumstances significantly affect the performance of a package or the carriage of passengers included in the package. It also requires Member States to ensure effective protection of travellers against the insolvency of package organisers, including the refund of payments and the repatriation of stranded travellers, through national insolvency protection systems. The rules on cancellations of packages due to unavoidable and extraordinary circumstances and on insolvency protection were updated and clarified through a revision[318] adopted in April 2026. On that occasion, the Directive was also complemented through rules on vouchers[319], which organisers may offer as an alternative to a refund within 14 days where a package is cancelled, and a 7-day business-to business refund right[320] where a service provider cancels a service included in a package. The 2026 revision aims to address issues identified during the COVID-19 health crisis and to make the legal framework more crisis-proof.

The EU consular protection framework is also relevant to travellers affected by crises outside the Union. EU citizens who are in a third country where their own Member State is not represented may seek consular protection from another Member State present, under the same conditions as that Member State applies to its own nationals. Cooperation between consular authorities, EU Delegations and the Union Civil Protection Mechanism can be particularly important during large-scale emergencies and evacuation operations.

The European Union Solidarity Fund (EUSF)[321] supports EU Member States and accession countries following severe natural disasters and, since 2020, major public health emergencies. It provides financial assistance for essential emergency and recovery operations, including:

- restoring the working order of infrastructure and plant in the fields of energy, water and wastewater, telecommunications, transport, health and education;
- providing temporary accommodation and funding rescue services to meet the needs of the population concerned;
- securing preventive infrastructure and measures of protection of cultural heritage;
- cleaning up disaster-stricken areas, including natural zones, in line with, where appropriate, ecosystem-based approaches, as well as immediate restoration of affected natural zones to avoid immediate effects from soil erosion.

While the EUSF does not directly reimburse private entities, it supports Member States in quickly restoring essential infrastructure and cultural and natural heritage, which are important for the recovery of tourism destinations following a disaster.

---

[317] European Commission, European Solidarity Corps (ESC); European Youth Portal, Types of European Solidarity Corps projects, both accessed November 2026.
[318] European Parliament and Council of the European Union, Directive (EU) 2026/1024 amending Directive (EU) 2015/2302 on package travel, April 2026.
[319] European Parliament and Council of the European Union, Directive (EU) 2026/1024 amending Directive (EU) 2015/2302, Article 12a (Vouchers), April 2026
[320] European Parliament and Council of the European Union, Directive (EU) 2026/1024 amending Directive (EU) 2015/2302, Article 22(2), April 2026.
[321] European Commission, EU Solidarity Fund, accessed November 2026.

Example: ESF interventions[322]

Spain: rebuilding after devastating wildfires – In 2025, Spain endured a series of extreme weather events, including prolonged drought, intense heatwaves, and three major wildfire outbreaks, forcing mass evacuations and tragically claiming eight lives. The Commission is proposing a total of €120.4 million, including an advance payment of over €30 million already granted, to support recovery efforts, including the restoration of critical infrastructure such as water, wastewater, telecommunications, education, transport, and cultural heritage. Funds will also be allocated for temporary accommodation and emergency rescue services.

Cyprus: recovering from unprecedented wildfires – Cyprus experienced two catastrophic wildfires in July 2025, primarily in the Limassol and Paphos regions. The Commission is proposing a total of €9.2 million, which includes an advance payment of €2.3 million already paid to Cyprus, to support the restoration of energy, water, wastewater, telecommunications, and transport infrastructure.

Austria and Poland: Recovery efforts following devastating floods in autumn 2024 – The European Commission has finalized the disbursement of €108 million from the EU Solidarity Fund (EUSF), of which €32 million for Austria on top of an advance payment of €10 million received in April, and €76 million for Poland. The payments follow the approval by the European Parliament and the Council of the Commission proposal which was based on applications submitted by these countries. In September and October 2024, severe and persistent rainfall led to significant flooding across several Central and Eastern European countries. The EUSF support will help restore vital infrastructure across various sectors, including transport, water and wastewater management, as well as infrastructure security measures. Emergency and recovery operations may be financed by the EUSF retroactively from day one of the disasters.

In addition, EU state aid frameworks[323] allow for rapid and specific crisis and disaster support to European businesses, where needed. The flexibility of the State aid rules to respond to major economic shocks has been demonstrated through, for example, the State aid Temporary Framework, which helped EU countries address the economic effects of the COVID-19 pandemic, the State aid Temporary Crisis and Transition Framework,[324] which supported the response to the economic consequences of Russia's war of aggression against Ukraine, and the Middle East crisis Temporary State aid Framework[325] supporting sectors particularly exposed to the consequences of the Middle East crisis.

This extensive EU preparedness and relief framework provides a range of mechanisms that can support tourism stakeholders and destinations in the event of major disasters and crises. Relief is best managed close to where disasters and crises strike, while EU instruments provide supporting and enabling frameworks at European level. In addition, the Strategy proposes that the crisis preparedness workstream under the EU Tourism Alliance will regularly evaluate emerging needs and, where appropriate, explore options for additional tourism-specific crisis response tools.

[322] European Commission, EU Regional Policy Projects Database, accessed November 2026.
[323] European Commission, State aid, accessed November 2026.
[324] European Commission, Temporary Crisis and Transition Framework, accessed November 2026.
[325] European Commission, Middle East Crisis Temporary State Aid Framework (METSAF), accessed November 2026.

Experience from previous crises has nevertheless shown that horizontal emergency mechanisms do not always provide tourism authorities with the detailed sectoral information needed to assess impacts on visitor flows, bookings, destination economies, traveller behaviour and tourism businesses. Tourism therefore also requires dedicated governance arrangements, practical tools and sector-specific guidance to support preparedness and resilience. To help address this gap, the Commission financed the Crisis Management and Governance in Tourism project under the Single Market Programme, which developed practical tools and recommendations to strengthen crisis preparedness and governance across the tourism ecosystem[326].

Example: Crisis Management and Governance in Tourism

The Crisis Management and Governance in Tourism project supported tourism authorities and organisations across Europe in strengthening resilience through advisory services, capacity building and the development of practical governance tools. Combining analytical work with hands-on support for destinations, the project generated guidance and recommendations that now provide a valuable foundation for future EU action on tourism resilience.

Key outputs included:

- advisory support for 55 tourism authorities and organisations from 21 countries, each developing an action plan to strengthen resilience and crisis preparedness;
- a comprehensive final report containing policy recommendations and best practices[327];
- 10 e-learning modules on crisis preparedness and governance made available through the EU Academy[328]; and
- a repository of recommendations and practical resources published on the EU Tourism Platform[329].

The project highlighted the importance of:

- establishing clear governance structures and responsibilities for crisis management;
- integrating crisis preparedness into destination management and planning;
- strengthening communication with tourism businesses, travellers and residents;
- improving tourism intelligence and data to support decision-making; and
- reinforcing cooperation between public authorities, destination management organisations and the private sector.

These policy efforts are complemented by projects funded under the Union Civil Protection Mechanism (UCPM) addressing disaster preparedness in tourism destinations. For instance,

[326] European Commission, European Innovation Council and SMEs Executive Agency (EISMEA), Crisis Management and Governance in Tourism, accessed November 2026.
[327] European Commission, European Innovation Council and SMEs Executive Agency, Crisis Management and Governance in Tourism: Final Report, Publications Office of the European Union, 2024.
[328] European Commission, EU Academy, Crisis Management and Governance in Tourism, accessed November 2026.
[329] European Commission, EU Tourism Platform – Knowledge and Learning, accessed November 2026.

the WUITIPS project (Wildland-Urban-Interface Fire Touristic Infrastructures Protection Solutions) contributed to assessing and mitigating wildfire risks in tourist areas. The project assessed the vulnerabilities and effectiveness of risk mitigation measures in tourist facilities and the associated populations during forest fire emergencies in cross-border situations across the EU. As a result, it provided harmonised guidelines for implementing prevention and protection plans in tourist infrastructures, self-assessment tools and checklists for asset and people vulnerability, and examples of product applications in pilot sites. In addition, other UCPM-funded projects such as THEMIS[330], FIRE-SCENE[331] and CAMPER SAFE[332] support improved risk assessments, emergency preparedness planning, visitor risk awareness, evacuation arrangements and coordination between tourism operators and civil protection authorities. Their results provide practical tools and good practices that can be further disseminated and scaled up to strengthen the resilience of European tourism destinations[333].

Strengthening tourism-specific coordination

Recent experience has demonstrated the importance of strengthening coordination at European level specifically for tourism. Tourism authorities require timely, reliable and interoperable information and data on developments affecting travel demand, transport connectivity, visitor flows, destination impacts and business continuity. Such information is essential for strengthening situational awareness, supporting evidence-based decision-making and anticipating emerging risks. Effective preparedness also depends on continuous monitoring and close cooperation between public authorities and the tourism ecosystem. This creates added value for a light and flexible mechanism for structured information exchange between Member States, the Commission and relevant tourism stakeholders, while remaining fully complementary to existing horizontal EU crisis management structures.

The close interdependence between tourism and transport also highlights the importance of coordination with transport authorities, as disruptions to aviation, rail and maritime services often have immediate impacts on tourism flows and destination economies. Conversely, sudden changes in tourism demand may affect transport capacity, connectivity and the commercial viability of routes, particularly for peripheral, island and border destinations.

As announced in the Commission Notice providing guidance on EU rules applicable to passengers, tourism and transport operators in light of the reduced supply of jet fuel from the Middle East,[334] the Commission established a Tourism Crisis Coordination Network bringing together tourism authorities from Member States. The Network does not replace operational

[330] European Commission, Directorate-General for European Civil Protection and Humanitarian Aid Operations, DG ECHO, THEMIS – Strategic Framework for Raising Public Awareness and Training Programmes for Disaster Risk Management in the Tourism Sector, EU Civil Protection Knowledge Network, accessed November 2026.
[331] European Commission, Directorate-General for European Civil Protection and Humanitarian Aid Operations, DG ECHO, FIRE-SCENE: Advancing Wildfire Civil Protection Scenarios into Risk Planning and Governance, EU Civil Protection Knowledge Network, accessed November 2026.
[332] European Commission, Directorate-General for European Civil Protection and Humanitarian Aid Operations, DG ECHO, CAMPER SAFE: Disaster Risk Management Initiative for Campsite Safety, EU Civil Protection Knowledge Network, accessed November 2026.
[333] European Commission, Directorate-General for European Civil Protection and Humanitarian Aid Operations, DG ECHO, EU Civil Protection Knowledge Network – Project, accessed November 2026.
[334] European Commission, Commission Notice – Guidance clarifying certain EU rules applicable to passengers and tourism as well as transport operators, including in light of the current reduced supply of jet fuel from the Middle East, OJ C, C/2026/2669, May 2026.

emergency management, civil protection, consular assistance or sectoral enforcement structures. Its purpose is to complement these mechanisms by providing a dedicated forum through which tourism authorities can develop a shared understanding of emerging risks, exchange sector specific information and good practices, and identify issues requiring coordination with the competent authorities.

Improved preparedness and coordination can benefit tourism businesses and destinations by reducing operational disruption and supporting faster recovery, while travellers benefit from clearer and more consistent information and assistance during crises.

Example: First meeting of the Tourism Crisis Coordination Network (10 July 2026, online)

At its first meeting in July 2026, participants concluded that the impact of the Middle East crisis on EU tourism remained largely indirect and manageable. Discussions focused on transport connectivity, rising fuel costs and traveller confidence, while industry representatives confirmed that the overall outlook for European tourism remained positive despite pressures in certain markets and destinations. Participants nevertheless agreed on the importance of maintaining continuous monitoring of developments, recognising that the duration and wider impacts of geopolitical crises remain inherently uncertain.

Participants also agreed that climate-related disruptions, including wildfires, floods, heatwaves and water scarcity, increasingly represent a structural challenge for tourism rather than isolated exceptional events. These risks can affect destination safety, seasonality, infrastructure, natural and cultural assets, working conditions and the availability of transport and other essential services, requiring greater preparedness and resilience.

The meeting demonstrated the value of a coordination mechanism through which tourism authorities can exchange information, share good practices and develop a common understanding of emerging risks, while supporting evidence-based communication and coordinated preparedness across the tourism ecosystem.

3.3 Sustainable connectivity

Strong consumer and passenger rights and their effective enforcement are key elements for sustaining and increasing Europe's attractiveness as a tourist destination.

Sustainable connectivity, seamless mobility, and smooth passenger experiences are powerful drivers of tourism, with overall connectivity itself being the core issue for destinations. Delivering on these requires further enhancing the diversity and combination of transport choices available in the EU, allowing travellers to use the best combination of transport modes to arrive at and get around their destinations, with a need to also include sustainable mobility options.

At the same time, tourism is itself a powerful driver of sustainable travel and transport infrastructure. Mobility options for tourism also serve residents and transport connected sustain supply chains, for instance for local produce and businesses. Creating a virtuous tourism-

transport cycle plays an important role in making the 'freedom to stay'[335] a reality. Weak transport links can reinforce territorial disparities and make it more difficult for people to remain in certain regions. Improving accessibility is therefore a key enabling condition for making the 'freedom to stay' a reality. This includes stronger regional connectivity, better integration of transport systems, and more frequent and reliable services, including across borders and between remote areas and other bigger towns and cities.

3.3.1 Planning and booking a journey

The first stage of any tourist experience is planning and booking. In the EU, evidence has shown that travellers can encounter unnecessary complexity in the planning and booking of transport services. For certain transport modes, such as aviation, travellers have had easy access to tickets for decades[336]. For rail services and multimodal journeys, evidence has shown that travellers face more difficulties when searching for and booking tickets. A Eurobarometer survey from 2024 confirmed that among 26,000 EU citizens a third never booked a multimodal or multi-operator journey. The survey also showed that over a third of those who book such journeys experience booking barriers, including that they couldn't find a suitable combination or buy all the tickets they needed in one place, and that in rail those barriers are greater[337].

The recently adopted proposals for a Regulation on Multimodal Booking, the Rail Ticketing[338] Regulation and the targeted revision of the Rail Passenger Rights Regulation (collectively referred to as 'the Passenger Package')[339] will improve how online ticket distribution works, establishing rules for cooperation between ticketing platforms and transport operators and granting full passenger rights for rail journeys under a single ticket. They aim to increase the number of rail tickets available on online platforms by facilitating the search, comparison and booking process for regional and long-distance transport services sold in the EU. The Passenger Package is expected to boost consumer confidence and hence demand for rail travel thereby contributing to the sustainability and competitiveness objectives, as well as increasing the attractiveness of rail for tourism.

Travellers can also face challenges in planning and accessing relevant information on transport services on arrival at a new destination. With the swift implementation of the Delegated Regulation on Multimodal Travel Information Services (MMTIS)[340] by Member States, passengers will gain access to real-time travel information, including updates on flight, train,

---

[335] Enrico Letta, Much More than a Market – Speed, Security, Solidarity: Empowering the Single Market to Deliver a Sustainable Future and Prosperity for All EU Citizens, Report to the European Council, p. 16, April 2024.
[336] Kiss, M., The Impact of Unfair Commercial Practices on Competition in the EU Passenger Transport Sector, in particular Air Transport, European Parliament, Policy Department for Economic, Scientific and Quality of Life Policies, p. 13, April 2020.
[337] European Commission: Directorate-General for Mobility and Transport, Multimodal digital mobility service – Report, Flash Eurobarometer 551, August–September 2024, Publications Office of the European Union, accessed November 2026.
[338] European Commission, Proposal for a Regulation of the European Parliament and of the Council on Rail Ticketing, COM(2026) 232 final, 2026/0115 (COD), Brussels, May 2026.
[339] European Commission, Directorate-General for Mobility and Transport, One journey, one ticket, full rights: Commission simplifies Europe-wide travel booking and train travel, May 2026.
[340] European Commission, Directorate-General for Mobility and Transport, Commission Delegated Regulation (EU) 2017/1926 Supplementing the ITS Directive with Regard to the Provision of EU-wide Multimodal Travel Information Services, as Amended by Delegated Regulation (EU) 2024/490: Implementation Handbook, November 2024.

ferry, and transport-on-demand delays or cancellations, alongside parking availability for bicycles, scooters and cars.

Also, when planning a journey, tourists and tourist coach operators need to consider their compliance with local access rules, such as low- and zero-emission zones which restrict access to certain vehicles. Urban vehicle access regulations (UVARs), including low and zero-emission zones, are increasingly used by local authorities in cities across the EU to address urban mobility challenges such as air pollution or congestion. Local authorities are responsible for implementing and enforcing these schemes, including by providing advance registration possibilities for foreign vehicles and by clearly communicating the applicable rules and the boundaries of regulated areas through road signage and digital or other publicly available information. At present, vehicle owners might be required to buy a sticker or to pre-register their vehicle even if it is principally compliant with the applicable emission requirements since the local authorities have limited possibilities to access vehicle registration information and since the diversity of UVAR schemes prevent streamlined compliance schemes. This situation can create practical difficulties and uncertainty for citizens travelling across the EU, in particular where they need to understand how to comply with several different local schemes, often also in a language they do not master.

To facilitate compliance and reduce unnecessary burden, the Commission will launch a new initiative to support the provision of such information, starting with the TEN-T urban nodes, and facilitate user-friendly vehicle compliance for Urban Vehicles Access Regulations. In 2027, the Commission will start work on digitising available information on UVARs, and making this information available to citizens and corporate users in a user-friendly and interoperable framework. This action will reduce information cost and uncertainties about compliance needs. In this context, the Commission intends to develop by 2028 an information access point for citizens, integrated into the existing Your Europe portal. It should provide reliable and up-to-date information on UVARs across the Union. The Commission will further investigate measures that will facilitate a user-friendly digital vehicle compliance verification mechanism, by possibly tapping European Digital Solutions such as the European Digital Wallet (EUDIW)**.**

In January 2026, the expert group on urban mobility (EGUM) [341] issued a report[342] addressing the impacts of city access restrictions on coach operations, with a particular focus on coach tourism. The EGUM will continue with another report to be delivered by end 2026 to deepen the knowledge on existing challenges, barriers and potential measures to facilitate better mobility experience in cities including the alignment of tourism and sustainable urban mobility needs to provide practical insights for (tourism) businesses, local authorities and city planners.

Having access to relevant data is also important to allow citizens to make sustainable choices. Through CountEmissionsEU and the Flight Emission Label,[343] passengers will be able to

[341] European Commission, Directorate-General for Mobility and Transport, Expert Group on Urban Mobility, accessed November 2026.
[342] European Commission, Directorate-General for Mobility and Transport, EGUM Report: City Access for Businesses and Coach Transport, January 2026.
[343] European Parliament and Council of the European Union, Regulation (EU) 2026/1030 of 29 April 2026 on the greenhouse gas emissions accounting of transport services, Official Journal of the European Union, April 2026; European Commission, Commission Implementing Regulation (EU) 2024/3170 of 18 December 2024 laying down detailed provisions concerning the voluntary environmental labelling scheme for the estimation of the environmental performance of flights (Flight Emissions Label), Official Journal of the European Union, December 2024.

compare the estimated volume of emissions associated with different travel options and make informed choices.

3.3.2 Ensuring a sustainable, seamless and accessible travel experience across Europe

To improve the overall travel experience in the EU, gaps in transport services should be addressed across all available transport modes. The foundations of an optimal transport offering for tourists should first and foremost build on completing the single European transport market, as well as the parallel greening of all transport modes, in line with the EU's climate targets, be it related to zero-emission vehicles or the decarbonisation of the aviation and maritime sectors through phased in use of sustainable fuels.

Concurrently, this transition must provide barrier free accessibility to the extent possible, ensuring that infrastructure services and digital interfaces are universally designed to accommodate persons with disabilities and persons with reduced mobility. When travelling in the EU, tourists have many different transport modes to choose from – from road, coach and rail to flights and ferry connections. The Commission aims to address any barriers and ensure a high-quality transport offering for tourists across all available transport modes.

Local mobility

Sustainable local mobility solutions are essential for communities of all sizes, for residents as well as for tourism.

Urban tourism mobility. Tourism can increasingly be a mobility and public space stress test for Europe's cities: seasonal peaks and event surges create concentrated demand on public transport, roads and walking networks; coaches and cruise flows compete for scarce space; and historic centres often lack the physical capacity to absorb traffic without undermining safety, air quality and resident liveability. Cities need to anticipate visitor flows, manage peaks and access, and steer mode choices towards public transport, walking and cycling while maintaining reliable everyday mobility for residents and workers.

Planning is therefore key. The EU has developed the concept of sustainable urban mobility plans (SUMP). A SUMP[344] is a strategic plan designed to satisfy the mobility needs of people and businesses in cities and their surroundings for a better quality of life. It builds on existing planning practices and takes due consideration of integration, participation, and evaluation principles. A SUMP should cover a geography which goes beyond the city administrative borders taking into account real traffic flows and should foresee cooperation and synergies between all levels of government, local, regional, national and across different policy areas. It ensures a variety of sustainable transport options for the safe, healthy and fluid passage of people and goods, with all due consideration for fellow residents and the urban environment. The SUMP Guidelines[345] which give cities advice on a process for preparing and implementing

[344] European Commission, Directorate-General for Mobility and Transport, Sustainable Urban Mobility Planning and Monitoring, accessed November 2026.
[345] European Commission, Directorate-General for Mobility and Transport, Guidelines for Developing and Implementing a Sustainable Urban Mobility Plan, Third Edition, EU Urban Mobility Observatory, June 2026.

their SUMPs were updated in 2026 to better support cities in developing and implementing SUMPs.

Rural tourism mobility. In many parts of Europe, rural communities experience a significant mobility deficit, as access to essential services like employment, education, healthcare, and recreation becomes increasingly concentrated in urban centres. This trend deepens reliance on private vehicles, exacerbating socioeconomic inequalities, increasing carbon emissions, and putting individuals without access to a car at risk of transport poverty.It also creates unfavourable conditions for tourism. Recent EU guidance on sustainable rural mobility and ecotourism[346] aims to address these issues by promoting interconnecting rural mobility in neighbouring SUMPs and showcasing good practice examples for sustainable rural mobility, including shared and active mobility solutions.

Example cases:

South Tyrol Alto Adige Guest Pass[347]

The South Tyrol Alto Adige Guest Pass, included in nearly all tourist stays is sent to guests before their arrival and offers unlimited access to trains, buses, shuttles and select cable cars, encouraging visitors to leave their cars behind. This allows guests to use buses, regional trains and select cable cars throughout South Tyrol (IT) from the day of their arrival with just one ticket.

The initiative supports rural and urban mobility, strengthens public transport and engages accommodation providers as partners in promoting car-free travel. By making sustainable transport the default option, it reduces congestion, lowers emissions and fosters a culture of shared mobility, beneficial to both visitors and local communities. The Guest Pass also includes additional benefits such as activities, guided tours, admission fees or discounts.

The South Tyrol Guest Pass is based on voluntary opt-in by the singe tourist destinations in South Tyrol. The scheme foresees a minimum opt-in that increased over the year: in 2023 at from at least 70% of all overnight stays in 2023 at least 90% of all overnight stays in 2025.

Austria: Tourism Mobility Day and tourism mobility platform[348]

Since 2014, the ministries responsible for tourism, mobility and environment initiated a closer cooperation under the Tourism Mobility Day to strengthen the link between the tourism and mobility sectors and implement best practices. This annual conference continues to enjoy great interest and rising participation, since several years also from neighbouring countries. In 2016, the tourism mobility platform was introduced in its wake, allowing stakeholders from the tourism and mobility sector at national and regional level to discuss challenges, possible cooperation and best practices biannually.

A particular focus is put on increasing the awareness of guests, the local population and tourism employees, creating and communicating “last mile” solutions, including active mobility and

[346] European Commission, Directorate-General for Mobility and Transport, Commission Publishes New Guidance on Sustainable Rural Mobility and Ecotourism, July 2025.
[347] Südtirol GuestPass, Südtirol GuestPass – Benefits Portal, accessed November 2026.
[348] Austrian Federal Ministry for Economy, Energy and Tourism, Mobilität im Tourismus, accessed November 2026.

ticketing. Results of the cooperation are, among other things, direct contact persons, mobility coaches in destinations, guest cards including mobility services, as well as national rail operators (ÖBB and Westbahn) closely cooperating with individual tourism destinations on service design and marketing. Further, three regions, Salzburg (2025), Carinthia (2026), have introduced free public transport in the entire territory for all overnight guests. This is being financed through a part of the tourist tax on overnight stays. In Burgenland (2025), guests can access free public transport through the free Burgenland card.

Tourism mobility on (small) islands.

Significant seasonal tourist flows put great pressure on the transport systems of small islands, with this seasonality leading to serious swings in population and transport demand. The Sustainable Island Mobility Plan Guide (SIMP),[349] developed by CIVINET Greece-Cyprus[350] (the Greek-speaking local network of CIVITAS) with the University of the Aegean and published in 2024, offers a hands-on framework for designing affordable, people-centred mobility in small and medium-sized territories. A typical small or medium-sized Greek island has no urban area, but its seasonal population, both in terms of the largest settlement and in terms of the island as a whole, is often of an urban size, but without the urban infrastructure and mobility services.

Multimodal passenger hubs (MPHs). MPHs are an important aspect of tourism connectivity. They act as a gateway between cities and long-distance transport infrastructure and services. These hubs should serve to connect and integrate the local mobility system with long distance services, enabling a smooth arrival, departure or transit experience and offer sustainable mobility options to continue to last legs of journey. The SUMPs to be developed for the 431 urban nodes on the trans-European transport network will provide the strategic framework for this and determine how MPHs are embedded in cities to meet the needs of passengers. This requires reliable and properly integrated last-mile mobility services. Governance is a critical enabler of seamless mobility as it coordinates the interests and responsibilities of many stakeholders, including infrastructure managers, train operators, urban public transport authorities and urban mobility services providers.

During the 16th Florence Intermodal Forum[351], co-organised with the Transport Area of the Florence School of Regulation, experts explored the best practices, identify persistent bottlenecks, and discuss the governance frameworks needed to establish efficient multimodal hubs. The Commission will take forward this work with experts, to better understand what the key components of a fully functioning MPHs are and what the investment needs are. As a first step, the expert group on urban mobility will issue end 2026 a report building on the results of the 2025 stocktaking study on multimodal passenger hubs[352], providing (1) feedback and types of investment needed to integrate all modes of transport, including active travel and micromobility, and how privately operated mobility services (e.g. coaches and taxis) can be accommodated; (2) summary of the technical requirements currently applying to multimodal passenger hubs and future requirements needed to comply to the TEN-T Regulation (e.g., charging, refuelling, travel information, connecting long distance and urban modes etc.) and

[349] CIVITAS, Sustainable Island Mobility Plan: How to Prepare a SIMP for a Small or Medium-Sized Greek Island, May 2024.
[350] CIVITAS, CIVINET Greece-Cyprus, CIVITAS Initiative, accessed November 2026.
[351] Florence School of Regulation (FSR), Linking Urban Multimodal Hubs to the High-Speed Rail, 16th Florence Intermodal Forum, European University Institute, March 2026.
[352] European Commission, Directorate-General for Mobility and Transport, EU Urban Mobility Observatory, accessed November 2026.

(3) a collection of best practices and case studies of multimodal passenger hubs that have already been developed and implemented, with a special focus on connections to long-distance high-speed rail.

Public transport information provision and ticketing. While tourists should be able to move around easily upon arrival, they often struggle to access the information and payment methods needed to use local public transport services – a complication often deterring them from using these options. To simplify journey planning, booking and payments across cities, the Commission welcomes and encourages an initiative led by public transport authorities and associations to develop solutions ensuring EU-wide interoperability of local transport systems for travel information access and ticket purchasing.[353] The objective is to significantly improve the tourist experience and encourage public transport use by ensuring that simple digital options are accessible and inclusive, while enabling digital payment solutions.

Based on pilot projects and good practice examples[354], the Commission will encourage further exploration and scaling up of combined offers for public transport and tourism activities. The continued rollout of EUDI Wallets can be useful in that context, simplifying the identification and payment flow for users and participating entities.

On-demand transport. Local mobility services also include passenger transport-on-demand (taxi and private hire vehicle (PHV) services). Especially app-based services offering up-front pricing and electronic booking which often appealing for tourists. Affordable and high-quality local transport, including transport-on-demand services, add to the attractiveness of a destination. The Commission continues monitoring that Member States' rules governing these services are in compliance with the EU treaties. The Commission also considers conducting a new study on the development of the local passenger transport-on-demand sector (taxis and PHV), its obstacles, its potential (in support of decarbonisation and multimodal mobility) and its role for the tourism sector.

Bike-sharing and shared micromobility services. They help visitors cover short urban and peri-urban distances without relying on taxis or PHVs. They can also improve access to cultural sites, waterfronts, parks and neighbourhood attractions that are not always well served by conventional public transport, helping to spread visitor flows more evenly and support local economies beyond the main tourist hotspots. When well integrated with public transport, digital journey planning and clear local rules, they can improve the overall visitor experience. Appropriate infrastructure, parking management, data-sharing, safety measures and seasonal demand planning are important. In this sense, bike-sharing and shared micromobility are best seen as enabling tools within broader sustainable urban mobility planning (SUMP) and destination management strategies. This will be considered in the dedicated guidance on the link between tourism and sustainable urban mobility planning.

Examples:

Through the **Urban Sustainable Mobility Plan, Genoa**[355] is accelerating its transition to green mobility. The city has installed 280 electric charging stations, bicycle stations across the city

[353] European Commission, Directorate-General for Mobility and Transport, Multimodal Travel Information, accessed November 2026.
[354] IDM Südtirol-Alto Adige, "Südtirol Guest Pass'': Deine Gästekarte für den Südtirolurlaub, accessed November 2026.
[355] Invest in Genova, SUMP – Sustainable Urban Mobility Plan, accessed November 2026.

and next to main transportation hubs like stations. Additionally, the city encourages transport sharing and facilitates the use of bicycles through the introduction of speed limits, restricted traffic zones and incentives to purchase electric bicycles and scooters, as well possibilities of bike sharing, bike parking places and night-time bike parks at the main city stations, further encouraging citizens to choose a greener and more sustainable mode of transport for their commute.

Since 2022 **Braga supported uptake of cycling.** It launched a pilot project called Bicification[356] designed to include the construction of bike lanes by default in road infrastructure projects. The Braga Ciclável initiative plays a key role in encouraging daily bicycle use through awareness campaigns and strategic partnerships. Biking infrastructure and needs were framed within the city's Sustainable Urban Mobility Plan (SUMP), which sets emission reduction targets and outlines principles for sustainable urban development. Additionally, the BICIFICATION project supports Braga's ambition to foster a strong cycling culture. The city's initiatives have created a great impact already – an increase of +50% in bike lane usage has been recorded between 2022 and 2024.

The Paris Olympic Games[357] demonstrated that large-scale visitor mobility can be managed successfully, with a well-organised and well-planned urban transport system, with a focus on accessible public transport and cycling, real-time mobility demand management minimising congestion, and community engagement to ensure a positive experience of all participants. The mobility improvements were designed to benefit residents long after the event, ensuring a lasting legacy. At the crossroads of urban transport and rail services, Paris North Station integrates a complete multimodal network. In the early 2020s, an ambitious project modernized the station to accommodate the Paris 2024 Olympic Games, doubling its surface area and making passenger flows more fluid. The renovation focused on the essentials: improving the comfort and fluidity of travel. The work carried out includes the construction of a wooden bicycle shed equipped with solar panels, the installation of new escalators and the reorganization of waiting areas. The aim is to transform the North Station as a station for the 21st century, combining efficiency and aesthetics, while respecting its architectural heritage.

In 2025, **Rome welcomed around 50 million visitors**[358], including those attending the Catholic Jubilee, a major religious celebration that brought extraordinary flows of pilgrims to the city. The event acted as a true stress test for the city's innovation and mobility systems, leaving behind a legacy, which is infrastructural: new transport investments such as two additional metro stations on Line C, the expansion of electric mobility with 465 electric buses and depot electrification, the creation of new cycling routes or the pedestrianisation of previously car-dominated spaces.

The **Intercambiador de Santa Cruz de Tenerife**[359] is a good example of a multimodal passenger hub in an island context. Located in the capital city of Tenerife it serves both local residents and visitors combining bus, tram, ferry, park & ride and micromobility services, while also acting as a central point for distributing passenger flows across the island. By promoting public transport and mobility services it contributes to reducing emissions, easing congestion

[356] EIT Urban Mobility, Bicification: How the city of Braga has increased bicycle use in urban traffic, accessed November 2026
[357] Arthur D. Little, Paris 2024 Olympics, accessed November 2026
[358] Eurocities, Rome prepares for the Jubilee of Hope in 2025, accessed November 2026.
[359] TITSA, Correspondencias, accessed November 2026.

enhancing accessibility across the island, in line with the Insular Plan for Sustainable Mobility of Tenerife.

Lake Balaton Sustainable Rural Mobility Plan[360] tackles seasonal tourism pressures through integrated public transport, active travel, and the Balaton Sound TravelPass. It also tracks a cycling route connecting Budapest to the lake. The plan aims to balance tourism development with environmental conservation and spatial integration. Lake Balaton has become a leading example of how rural and tourism-intensive regions can adopt innovative mobility strategies to foster sustainable growth and regional resilience.

Examples: Insights from winners of the European Capital of Smart Tourism

Bordeaux (FR), Dublin (IE) and Gothenburg (SE)[361] integrate sustainable urban mobility into tourism through active travel, digital tools and accessibility measures. Across these three cities, several patterns emerge that offer practical guidance for European urban mobility planners.

Each city treats tourist flows as part of the broader mobility system, not as separate visitor infrastructure. This integration allows investments in walking routes, cycling infrastructure and accessibility to benefit residents year-round while meeting tourism needs.

Gothenburg's archipelago routes, Bordeaux's suburban trails and Dublin's Coastal Mobility Route show how directing visitors to less central areas can reduce pressure on core networks, spread economic benefits, and improve the visitor experience. This requires strong multimodal connections and targeted communication campaigns.

From Gothenburg's digital twin to Bordeaux's cultural-transport passes and Dublin's discovery apps, technology is used to inform, guide, and influence visitor behaviour.

All three cities demonstrate that inclusive mobility planning strengthens both brand and functionality. Gothenburg's governance model, Bordeaux's fully accessible public transport, and Dublin's Wayfinding Centre illustrate different approaches to embedding accessibility across the tourism journey.

Implementation challenges, whether in coordinating multiple departments in Dublin or managing construction disruption in Gothenburg, were overcome through proactive stakeholder engagement, transparent communication, and strong partnerships between government, industry, and civil society.

The central message from these three case studies is clear: sustainable urban tourism mobility is not about standalone projects. It is about embedding visitor needs into the same infrastructure, data systems and accessibility frameworks that shape daily life for residents, ensuring tourism growth strengthens rather than strains the urban mobility ecosystem.

Road

Car rentals. The car rental sector is a sizeable EU market that in 2022 represented an estimated 65.8 million rentals, around EUR 19.7 billion in annual revenue and a fleet of more than 2 million vehicles, with around 75% of rentals linked to leisure and tourism. To improve

[360] European Commission, EU Urban Mobility Observatory, Lake Balaton regional Sustainable Rural Mobility Plan (SRMP) approach to tourism, accessed November 2026.
[361] European Commission, EU Urban Mobility Observatory, Exploring the links between tourism and sustainable urban mobility: Insights from winners of the European Capital of Smart Tourism, accessed November 2026.

seamless travelling across the EU by car, the Commission is preparing a proposal for easier and more affordable use of rental cars across borders[362]. This will lead to more options for renting cars.

In addition, the Commission continues to work with the car rental industry and social partners to develop digital solutions for contactless check-in solutions. It will launch a pilot project on basis of a voluntary agreement with the rental car sector to promote easy digital vehicle pick-up for short-term rentals, allowing customers to complete check-out via smartphone and access the vehicle directly by digital key, without having to visit a rental counter. Under such a scheme, travellers could verify their identity and driving licence in advance, accept the contract digitally, receive the vehicle location and unlock code or app-based key on arrival, inspect the car with guided photos, and start the rental immediately, including outside standard opening hours. Similar digital access models are already used in app-based car-sharing services, and partial counter-free pick-up solutions are being deployed by some operators in several markets (e.g. airports and railway stations in some Nordic countries and parts of Western Europe). A voluntary EU-level pilot could help identify common practical standards, improve convenience for tourists, reduce waiting times at airports and stations, and support a more modern and efficient rental experience.

Driving rights are inherently linked to travelling beyond national borders as a tourist. The recent revision of the driving licence directive makes it a much easier experience, through a major novelty. While many Member States issued already digital (mobile) driving licences these documents were so far not recognised beyond the borders of the issuer Member State. Citizens had to carry therefore the physical card with them when abroad. This will now change as, once the new rules start to apply, mobile driving licences issued by a Member State will be recognised by all others. This will help simplify drivers experience, for instance when renting vehicles abroad or when interacting with police forces.

Drivers remain free to decide whether to use a physical or mobile document, but the relevance of the physical one will now mainly be limited to traveling to third countries that do not recognize (yet) EU mobile driving licences. Moreover, as cross-border cooperation increases between Member States as regards road safety related traffic offences, it is essential that drivers are fully aware of traffic rules and sanctions they may face in case of non-compliance. The EU facilitates this better understanding by making available information on traffic rules and, in the future also on, sanctions in place in all Member States on the Your Europe portal.

At the same time, when crossing borders by car, travellers can encounter many different toll stops. Allowing vehicles to pass through toll gates without stopping reduces traffic congestion and emissions. The Commission, in cooperation with the industry, is exploring options to facilitate cross-border travelling by creating larger free-flow areas across multiple neighbouring countries. The initiative will explore available on-board-equipment (e.g. a vignette or mobile application) for tolling in the respective Member States.

The new European Parking Card for persons with disabilities that is being created by Directive (EU) 2024/2841[363] will replace the current EU parking card for people with disabilities, which

[362] European Commission, Taking car rentals into other EU countries – rules, Have Your Say: Public Consultations and Feedback, accessed November 2026.
[363] European Parliament and Council of the European Union, Directive (EU) 2024/2841 of 23 October 2024 establishing the European Disability Card and the European Parking Card for persons with disabilities, Official Journal of the European Union, November 2024.

is facing problems with mutual recognition and fraud and forgery as it is based on only voluntary EU model without security features[364]. The new card is expected to have positive impact on free movement and accessible tourism of persons with disabilities because it will be mutually recognised and will ensure them equal access to parking rights and facilities reserved for persons with disabilities across the EU. Moreover, the security features of the new card should avoid its fraud and forgery and thus ensure that relevant parking spaces are not occupied by drivers without the right to use them.

Example: Pécs' smart parking system

The city of Pécs (Hungary), has made significant smart city developments, one of which being the smart parking system.[365] In the city centre, sensors have been installed in 709 parking spaces to provide real-time information on the occupation of spaces. This data is available through the free Parker app, helping drivers quickly find the available parking spots, reducing not only the time spent looking for a parking spot, but also contributing to less city centre traffic and lesser emissions. The app also includes navigation services that directly guide the visitor to the chosen parking lot. Information displays at four locations, covering a total of seven points, show available spaces nearby, further facilitating faster and more efficient access to the city centre. This is especially useful during summer festivals, events, or the Advent season when car traffic increases.

Coaches. Long-distance travel by coach often provides the most affordable long-distance travel option, in particular for younger travellers, and its potential as a sustainable travel option will be further achieved with the uptake of electric coaches. To support this, Regulation (EU) 2023/1804 on the deployment of alternative fuels infrastructure already requires Member States to ensure that a complete network of recharging infrastructure for heavy-duty vehicles develops along the TEN-T network and in urban nodes develops by 2030. Under the ongoing review of the Regulation, the Commission will assess if the existing targets need to be supplemented with specific targets for dedicated recharging infrastructure for coaches, for example in multimodal passenger hubs.

The full potential of coach transport for tourism can only be realised if there is a genuinely integrated EU market for the international carriage of passengers by road, resulting in low prices, high-quality services and seamless integration with other modes of transport. Such a framework will enable operators to develop resilient long-term solutions to attract passengers and to make the necessary investments to enhance the environmental performance and safety of their fleets. To this end, the Commission continues to enforce the common rules governing access to the international market for coach and bus services. The freedom to provide services is a fundamental principle of Regulation (EC) No 1073/2009 on common rules for access to the international market for coach and bus services and requires that carriers from all Member States are guaranteed access to international transport markets without discrimination on grounds of nationality or place of establishment. The Commission continues to rigorously monitor and enforce this Regulation in all Member States.

This also covers cabotage, which remains subject to the rules in force in the host Member State. The definition of public service obligations must likewise comply with the provisions of

[364] Council of the European Union, Council Recommendation 98/376/EC of 4 June 1998 on a parking card for people with disabilities, Official Journal of the European Communities, June 1998.
[365] Smart Lynx, Parker: The Smart Parking Mobile App, accessed November 2026.

Regulation (EC) No 1370/2007, and public service contracts are, in principle, to be awarded through competitive tendering procedures. Where appropriate, infringement procedures will be launched against Member States that do not comply with Regulations (EC) No 1073/2009 or 1370/2007. In addition, under Article 8 of this Regulation, the Commission shall adopt a decision when the Member States concerned are unable to reach agreement on a request for authorisation for international regular coach and bus services.

Furthermore, to ensure more efficient and higher-quality occasional passenger transport services, such as organised tours, Regulation (EU) 2024/1258 was adopted on 24 April 2024. It introduces greater flexibility in the distribution of drivers' breaks and rest periods and ensures equal treatment of domestic and international occasional passenger transport operations.

Example: Spain's discounted summer travel scheme for young people

Launched by the Spanish government in 2023, *Verano Joven* offers substantial public transport discounts in domestic regular coach intercity services to young people aged 18 to 30 during the summer months. Designed to make travel more affordable, the programme has also become an example of how shared passenger road transport can support a more balanced and sustainable tourism model. Spain's nationwide coach network allows young travellers to reach not only major cities but also smaller towns, rural communities, coastal destinations, nature parks and cultural heritage sites. Many of these places have limited rail connections or are difficult to access without a private car. Results: More than 2.3 million young passengers travelled by bus and coach through Verano Joven in 2025, compared with 1.6 million when the initiative was introduced in 2023. That represents an increase of almost 45% in just two years. Today, more than one in three young people in Spain choose coach travel during the summer campaign.

Rail

In 2025, nearly 1 in 8 trips of Europeans were made by train, representing 16.4% of domestic trips and 6.15.9% of foreign trips.[366] Today, with competition in rail not yet fully developed in the Union, and with different taxation regimes for the various transport modes, rail ticket prices are often more expensive than the costs for using less sustainable modes. In 2025, the Commission adopted the High-Speed Rail Plan, which sets out the steps needed to create a faster, more interoperable and better-connected network by 2040. It aims to cut journey times and make rail a more attractive and sustainable alternative to short-haul flights. The Commission works on a financing strategy for the plan to complement the ongoing work to boost long-distance and cross-border passenger rail services. Moreover, to support the implementation of the plan, the Commission will introduce a High-Speed Rail Scoreboard to monitor the development of high-speed rail services across Europe, assess progress, and support informed decision-making. As part of the High-speed Rail Plan, the Commission is also working to identify investment priorities in 40 major airports for better air-to-rail connectivity.

Air

Air connectivity is vital to the well-functioning of the Single Market, as well as to ensure the accessibility of insular and remote destinations. 9.8% of the intra-EU trips[367], and notably half

[366] Eurostat, Trips by main mode of transport,, accessed November 2026.
[367] European Commission, Directorate-General for Mobility and Transport, Statistical pocketbook 2025, September 2025.

of the cross-border trips, are carried by air.[368] Effective competition is key in achieving connectivity, as demonstrated by the proliferation of communities served by an air connection since the liberalisation of the European air services. However, in some situations, there may be routes which are not economically viable, and hence remain underserviced by market operators, such as those in remote or outermost regions, including islands. These are nevertheless critical for residents' connectivity and regional development, especially where alternatives to air transport are not available and limited. In such situations, Member States can impose air transport public service obligations (PSOs) to off-set the geographical disadvantages of such regions and to ensure a minimum standard of connectivity of the local population. The Commission continues assisting Member States in designing PSOs, to improve connectivity and social cohesion throughout their territory, in underserved, remote and insular regions, in particular in the low season.

Simultaneously, to prepare the air-services sector for the future, the Commission is reviewing the Air Services Regulation[369]. The initiative aims to shape a more resilient, competitive and more sustainable EU air services industry, while maintaining the highest levels of air safety and continuing to ensure connectivity, including in the most remote parts of the EU and the outermost regions, to protect consumer interests, and to preserve high quality employment. The European Common Aviation Area with the Western Balkans and Common Aviation Area agreements with Georgia, Moldova and Ukraine aim to extend the European aviation model to candidate countries[370]

In addition to the internal EU aviation market which is fully liberalised, Air Services Agreements (ASAs) are the important regulatory tools which underpin direct and diversified external access to European destinations. These agreements contribute to more balanced tourism flows, including improved geographical and seasonal dispersal, and reinforce connectivity with key partner countries. They also lead to more connections and greater affordability for European passengers travelling abroad, thereby contributing to economic growth and employment in partner countries. Wider market access also enables airlines to adapt rapidly to geopolitical disruptions by allowing for the rerouting of traffic through alternative routes and hubs, supporting the resilience of tourism flows. Modern Air Service Agreements can also contain clauses which promote cooperation between countries and regions in the areas of, inter alia, environmental protection (including noise), labour law and fair competition, ensuring that there is a shared understanding in the need for growth to be achieved sustainably. For these reasons, the Commission, along with Member States, should continue to encourage efficient, modern agreements that accommodate access and sustainable growth in the broadest geographical terms.

Maritime

Maritime and inland waterway passenger services, including vital ferry connections and sea and river cruise tourism, are drivers of Europe's territorial connectivity and seasonal economic vitality. Whereas total intra-EU maritime transport accounts by only 0.3% of the total passenger transport activities (including commuting and non-touristic trips, but not including private

[368] Eurostat, Trips by main mode of transport, accessed November 2026.
[369] European Parliament and Council of the European Union, Regulation (EC) No 1008/2008 of 24 September 2008 on common rules for the operation of air services in the Community (Recast), Official Journal of the European Union, October 2008.
[370] European Commission, Directorate-General for Mobility and Transport, A Common Aviation Area with the EU's neighbours, accessed November 2026.

cars)[371], 1.3% of all the tourism trips of Europeans took place through waterways. This percentage reach for 42.2% for Malta and 16.2% for Greece[372]. To further optimise the travel experience, closer integration of waterborne transport into the wider European multimodal network, transforming port terminals into modern, efficient passenger hubs that offer seamless transitions to rail and public transport. This will ensure that Europe's island, coastal, and river destinations remain reliably and dynamically connected throughout the entire year.

The EU Ports Strategy recognises the important role that ports play in supporting tourism and cruise activities in particular for islands and more remote destinations. It thus has developed a comprehensive roadmap for competitive small and medium-sized ports, in order to support their development. This includes, identifying their needs among the funding priorities, promotion of electrification and of security, and promoting connectivity in particular through the European Maritime Space. Furthermore, it calls on the Member States to support the ports in these areas especially in improving sustainability and connectivity, support the maritime cluster and promote a structured cooperation between ports and local industrial clusters.

Another issue that tourists can experience when travelling by leisure boat in the EU – along canals lakes, coastlines and islands – is the fragmented system for the recognition of recreational boating licences[373]. Boater licenses issued by one Member State are not necessarily recognised by another Member State's authority which may cause additional complexity and burden for boaters and businesses. Furthermore, Member States apply differing requirements for training, testing and recognition of licences depending on vessel size, engine power and operating area (coastal/inland). Applying UNECE Resolution No. 40 on an International Certificate for Operators of Pleasure Craft would bring about major simplification in that regard.

3.3.3 The passenger experience and passenger rights

The adoption of the revision of the Air Passenger Rights[374] Regulation and the recent political agreement on the Omnibus Regulation on enforcement for passenger rights[375] strengthen tourism by making travel more reliable and predictable for visitors. They improve, inter alia, fare transparency, maintain compensation for delays and cancellations, and improve the enforcement of passenger rights, giving tourists greater confidence to explore a wider range of destinations and modes. This supports a more sustainable and dispersed tourism model of quality across the EU.

The revised Package Travel Directive[376] will enhance the protection of travellers, while reducing burdens for operators and clarifying obligations for package organisers. It addresses

[371] European Commission, Directorate-General for Mobility and Transport, Statistical pocketbook 2025, September 2025.
[372] Eurostat, Trips by main mode of transport, accessed November 2026.
[373] European Commission, Directorate-General for Mobility and Transport and Panteia, Study to determine the advantages and drawbacks of a possible mutual recognition of boating licences for recreational boat operators: Final report, Publications Office of the European Union, November 2025.
[374] European Commission, Directorate-General for Mobility and Transport, Air passenger rights, accessed November 2026.
[375] Council of the European Union, Council and Parliament agree on more effective enforcement of passenger rights, Press release, June 2026.
[376] European Parliament and Council of the European Union, Directive (EU) 2026/1024 of 29 April 2026 amending Directive (EU) 2015/2302 to make the protection of travellers more effective and to simplify and clarify certain aspects of that Directive, Official Journal of the European Union, May 2026.

problems identified during the COVID-19 health crisis. It is estimated that this gain for businesses could reach at least EUR 181.4 million per year across the EU. It is now for the Member States to transpose the amended provisions into their national laws by 29 September 2028, and the Commission will support them in that respect. The new rules will become applicable on 29 March 2029. In its notice[377] of 8 May 2026, the Commission encouraged package organisers that offer vouchers to travellers to apply the new rules on vouchers on a voluntary basis already before the transposition of the amendments.

Additionally, updated rules on passenger rights are expected to bring more simplification, along with increased legal clarity for passengers, regarding in particular the responsibilities of transport operators, travel agents and tour operators.

The upcoming revision of the Consumer Protection Cooperation (CPC) Regulation[378] will reinforce the public enforcement of consumer rights and contribute to a level-playing field for businesses in the tourism sector, including through direct EU-level enforcement powers in specific cases.

Passengers in the EU can find themselves spending hours going through the different checkpoints at airports, maritime terminals, and transport hubs. The security restrictions and rules can also vary among Member States. The introduction of new technological solutions can offer opportunities to improve the overall passenger travel experience.

Facial recognition technology is a tool to modernise airport operations, enabling automated biometric comparisons to verify passenger identities and streamline their journey through airports. Such systems may significantly reduce boarding times, avoid fraud, improve operational performance, and minimise human errors. At the same time, the processing of biometric data also raises important data protection questions and requires stringent safeguards and compliance with regulatory requirements stemming from the EU's data protection legislation, including the GDPR, to protect individual rights and freedoms.

The deployment of advanced screening technologies at the security checkpoint allowing for the lifting of liquids, aerosols and gels (LAGs) restrictions[379] in airports adopting these technologies also offers opportunities to improve the overall passenger travel experience. They can streamline security processes related to liquid restrictions, while maintaining high detection standards. Their implementation can also contribute to more efficient passenger flows and improved operational performance at airports. This is why the EU aviation security strategy encourages investment in modern technologies that strengthen security while facilitating passenger processing.

Moreover, the travel experience can also be improved by clear information on rules or restrictions. For example, passengers may face confusion about the rules for travelling with pets on aircraft, which could lead them to leave their pets at home and reduce the length of

[377] European Commission, Guidance clarifying certain EU rules applicable to passengers and tourism as well as transport operators, including in light of the current reduced supply of jet fuel from the Middle East, Commission Notice C°(2026)°3172 final, May 2026.
[378] Regulation (EU) 2017/2394 of 12 December 2017 on cooperation between national authorities responsible for the enforcement of consumer protection laws and repealing Regulation (EC) No 2006/2004, p.1, Official Journal of the European Union, December 2017.
[379] European Commission, Directorate-General for Mobility and Transport, Liquids, aerosols and gels, accessed November 2026.

their trips, or decide not to travel altogether. Airlines have differing policies on carriage of pets in the cabin, which are not always clearly communicated, and Member States are also allowing divergent approaches in terms of what is permitted under safety rules. The Commission is looking at measures to address this confusion as part of the review of the Air Services Regulation.[380]

3.4 Global outreach and branding

The fourth pillar of the Strategy focuses on strengthening the international dimension of EU tourism policy and Europe's position as a leading global tourism destination. Over recent years, the Commission has progressively strengthened the external dimension of EU tourism policy. Tourism has consequently become an increasingly important component of the EU's external action, supporting initiatives under the enlargement process, the Global Gateway, neighbourhood cooperation and strategic partnerships with key partner countries and regions. At the same time, it creates opportunities for European businesses, promotes European expertise, and strengthens the visibility and competitiveness of European destinations in global markets.

Given the inherently international nature of tourism, closer cooperation with partner countries and international organisations, connectivity and travel facilitation are important for the competitiveness of European tourism. At the same time, a stronger common positioning of Europe can increase its visibility in global markets and support more sustainable and balanced tourism flows.

3.4.1 Strengthening the international dimension of EU tourism policy

The Commission has progressively developed a structured framework for international tourism cooperation through multilateral organisations, bilateral and regional policy dialogues, and tourism components embedded in wider external partnerships. These exchanges support policy cooperation, facilitate business and investment opportunities, including partnerships between European tourism SMEs and businesses in partner countries, promote European standards and expertise, and strengthen cooperation on topics of common interest. Tourism can also serve as an instrument of soft diplomacy, fostering people-to-people contacts, mutual understanding and dialogue between countries and communities. They also provide an important platform for promoting the objectives of the present Strategy.

Multilateral cooperation provides an important foundation for international tourism policy coordination, enabling the exchange of evidence, good practices and policy approaches, as well as the development of common standards and statistical methodologies. The Commission cooperates closely with key international organisations, in particular the Organisation for Economic Co-operation and Development (OECD) and the United Nations, notably through UN Tourism.

Within the OECD, the Commission actively participates in the Tourism Committee, its Bureau and the Working Party on Tourism Statistics. Through its contribution agreements with the

[380] European Commission, Directorate-General for Mobility and Transport, Commission takes step to update air service rules, accessed November 2026.

OECD, it also supports analytical work, evidence-based policymaking, tourism statistics and international policy benchmarking.

Cooperation with UN Tourism is underpinned by a Memorandum of Understanding signed in 2012, which will be modernised through a Cooperation Framework (Administrative Arrangement) following the publication of the Strategy. The framework provides a structured basis for cooperation on areas of common interest, including international tourism policy, competitiveness, skills, data and innovation, resilience and crisis preparedness, integrated destination management, sustainable and regenerative tourism, and connectivity, while facilitating exchanges of expertise, analytical work and participation in each other's activities.

The EU also participates as a full member in the G20 Tourism Working Group, where it contributes to international discussions on sustainable, resilient and competitive tourism and to the preparation of the G20 Tourism Ministers' Declaration.

Cooperation with the International Maritime Organization ensures that global standards for maritime transport, including search and rescue coordination, passenger ship safety, environmental protection and maritime decarbonisation, support sustainable coastal, island and cruise tourism in Europe while maintaining high safety and operational standards worldwide. As regards air transport, cooperation with the International Civil Aviation Organization is crucial, particularly for supporting sustainable and passenger-centric air transport and facilitating travel, including through work on border procedures, customs and immigration.

Main outcomes of the G20 Tourism Working Group under the Brazilian Presidency (2024)

Building on the *Goa Roadmap for Tourism as a Vehicle for Achieving the Sustainable Development Goals*[381], adopted under the Indian G20 Presidency in 2023, the Brazilian Presidency continued work across five priority areas: green tourism, digitalisation, skills, tourism micro, small and medium-sized enterprises, and destination management.

At the G20 Tourism Ministers' Meeting in Belém in September 2024, Ministers adopted the *Belém Declaration*[382], reaffirming tourism's contribution to sustainable, resilient and inclusive development and setting out common orientations in the following areas:

- **Sustainability measurement:** support for the implementation of the United Nations *Statistical Framework for Measuring the Sustainability of Tourism* (SF-MST), which provides an internationally agreed framework for measuring tourism's economic, social and environmental dimensions[383].

[381] International Labour Organization, G20 Goa Roadmap for Tourism as a Vehicle for Achieving the Sustainable Development Goals, June 2023.
[382] G20 Tourism Ministers, Bélem Declaration, September 2024.
[383] World Tourism Organization (UNWTO), Statistical Framework for Measuring the Sustainability of Tourism (SF-MST): Final Draft, prepared for the United Nations Statistical Commission, February 2024.

- **Knowledge sharing and peer learning:** continued development of the G20 Tourism and SDGs Dashboard[384], whose collection grew to 170 case studies, and recognition of its potential to connect stakeholders and destinations facing similar challenges[385].
- **Skills development:** continued investment in professional training and lifelong learning, including inclusive opportunities for young people, women, persons in vulnerable situations, local communities and Indigenous Peoples, as appropriate.
- **Tourism MSMEs and destination management:** support for green and digital transitions, access to financing and expertise, public-private partnerships and governance models that promote sustainable destination management and responsible visitor behaviour.
- **Tourism financing:** identification of four priority areas for financial support: climate resilience and nature-positive tourism, social development, new tourism products in local communities, and shared tourism infrastructure[386].

These outcomes illustrate the growing convergence between EU priorities and international tourism policy discussions, particularly on sustainability measurement, skills, support for SMEs, integrated destination management and resilience.

Tourism also forms part of the EU's enlargement policy. It is addressed in the Stabilisation and Association Agreement Subcommittees under Chapter 20 (Industrial Policy and SMEs). The Growth Plan for the Western Balkans[387] also identifies tourism as a priority area for regional cooperation, in line with the Common Regional Market Action Plan (2025-2028)[388] under the Berlin Process. The Commission supports these efforts through cooperation with the Regional Cooperation Council and Western Balkan partners, including the Tourism Expert Group. The Commission also supports Ukraine's recovery and European integration, including through its cooperation in the establishment of the Tourism Alliance for Ukraine. As part of these efforts, Ukraine has also been invited to participate as an observer in the Commission's Tourism Advisory Committee, alongside other enlargement partners, further strengthening policy dialogue and cooperation with the EU[389].

[384] World Tourism Organization (UNWTO), G20 Tourism and SDGs Dashboard, Tourism for SDGs Platform, accessed November 2026.
[385] G20 Tourism Working Group, Report Delivery 1C – Promote and Survey Best Practices on the Progress towards the Sustainable Development Goals, Brazilian G20 Presidency, 2024, accessed November 2026.
[386] G20 Tourism Working Group, Report Delivery 3 – Presidency Report – Funding Lines and Priority Areas for Investment in Tourism, Brazilian G20 Presidency, 2024, accessed November 2026.
[387] European Commission, Directorate-General for Enlargement and Eastern Neighbourhood, Growth Plan for the Western Balkans, accessed November 2026.
[388] European Commission, Directorate-General for Enlargement and Eastern Neighbourhood, Common Regional Market, accessed November 2026.
[389] European Commission, Register of Commission Expert Groups and Other Similar Entities, Advisory Committee on Tourism, Expert Group No. 1351, accessed November 2026.

Example: Tourism Alliance for Ukraine[390]

Launched at the Ukraine Recovery Conference in Rome in July 2025, the Tourism Alliance for Ukraine is an international platform bringing together public and private partners around the recovery and long-term development of Ukraine's tourism ecosystem. It aims to coordinate international support and expertise and support Ukraine's tourism reforms and progressive alignment with the EU. Its focus areas include digitalisation and market formalisation, alignment with EU frameworks and legislation, and capacity-building for local actors. The Alliance also seeks to position tourism as a contributor to local economic resilience, sustainable reconstruction and Ukraine's path towards EU membership.

Dedicated bilateral and regional tourism dialogues complement these broader frameworks by addressing shared priorities with key partner countries and regions. They can also support people-to-people contacts and identify practical opportunities for cooperation, including, where appropriate, the development of cross-border tourism routes.

- Following the **first EU-Central Asia Tourism Forum** held in Tashkent in 2025, tourism has become an increasingly important component of the EU-Central Asia Partnership. The Forum supports the implementation of the Joint Roadmap for Deepening Ties between the EU and Central Asia and promotes sustainable destination management, connectivity, investment, skills development and business cooperation.
- The **first EU-Japan Tourism Dialogue**, launched in Tokyo in 2026 back-to-back with the EU-Japan Transport Dialogue, established a structured framework for cooperation on sustainable tourism, multimodal connectivity, destination management and innovation, supporting the implementation of the EU-Japan Strategic Partnership Agreement and encouraging balanced tourism flows between both partners.
- Under the **EU-Greenland Partnership and the EU's Arctic policy**, the Commission is developing cooperation on sustainable tourism as part of broader efforts to support economic diversification, green and digital transitions and resilience. This illustrates how tourism is increasingly integrated into wider EU external partnerships and contributes to broader EU policy objectives in the Arctic.
- Building on the Strategic Partnership with the **Gulf Cooperation Council**, the Strategy envisages the establishment of an **EU-GCC Tourism Forum** to strengthen cooperation on sustainable tourism, connectivity, investment and economic diversification, while creating new opportunities for European tourism businesses.
- The Strategy also supports the launch of an **EU-India Tourism Dialogue**, recognising India as one of the world's fastest-growing outbound tourism markets and an increasingly important strategic partner for the European Union. The dialogue will strengthen cooperation on sustainable tourism, connectivity, investment and tourism services within the broader EU-India Comprehensive Strategic Agenda.

Beyond dedicated tourism dialogues, existing EU instruments already support practical tourism cooperation with partner countries at regional and local level. The **International Urban and Regional Cooperation (IURC) programme** connects EU cities and regions with counterparts worldwide to exchange knowledge and develop joint solutions to shared urban and regional challenges. Sustainable tourism has emerged as one area of cooperation, linking tourism with

[390] State Agency for Tourism Development of Ukraine, Tourism Alliance for Ukraine, accessed November 2026.

wider territorial priorities such as climate resilience, cultural heritage, local economic development and community engagement[391].

Example: International Urban and Regional Cooperation on sustainable tourism

The IURC Sustainable Smart Tourism Community of Practice brings together cities and regions from Europe and Asia to move from peer learning towards practical cooperation on sustainable tourism. Prato and Coimbra from the EU cooperate with Gangtok, Seberang Perai, Jeonju, Melaka and Leh in Asia, through technical exchanges, study visits and the development of pilot initiatives adapted to local needs. In India, cooperation with Gangtok and Leh focuses on sustainable and climate-resilient tourism, including heritage management, tourism flows and community-based tourism development. The cooperation illustrates how EU experience at city and regional level can be shared internationally while allowing European partners to learn from approaches developed in partner countries[392].

Broader EU external investment instruments can also support sustainable tourism development in partner countries, including through **Global Gateway** investments**.** International engagement on tourism with EU partner countries should be framed as part of a development agenda that strengthens simultaneously global connectivity and local economies, improving the quality and delivery of local services, including through sustainable and efficient transport solutions and local finance. Tourism growth often concentrates in cities, coastal urban areas and heritage centres, and increases demand for water, sanitation, waste management, sustainable mobility, public spaces and climate-resilient infrastructure. Tourism interventions should therefore be systematically linked to investments in urban service provision, integrated land-use and sustainable mobility planning, as well as stronger local governance, ensuring that tourism growth generates tangible benefits for both residents and visitors. By linking destination attractiveness to improved urban services and local government capacity, the EU can promote its distinctive model of sustainable tourism that minimises externalities, strengthens local value creation and aligns with broader development and Global Gateway objectives.

3.4.2 International cooperation on tourism skills

Tourism skills are becoming an increasingly important component of the EU's international cooperation. Supporting skills development contributes to more resilient tourism ecosystems, facilitates knowledge exchange and workforce mobility, and helps partner countries strengthen their tourism sectors while addressing labour shortages and skills needs within the European Union.

The Commission already supports international cooperation on tourism skills through a range of instruments. These include projects managed by the **European Training Foundation**, **Erasmus+** and other EU initiatives, which promote skills development, qualifications, apprenticeships, policy reforms and capacity building in partner countries. These initiatives

[391] International Urban and Regional Cooperation (IURC), International Urban and Regional Cooperation – A Programme of the European Union, accessed November 2026.
[392] International Urban and Regional Cooperation (IURC), IURC EU, Asia & Australasia: Cities and Regions Move from Cooperation to Implementation in 2026, April 2026.

also facilitate exchanges of expertise between tourism stakeholders and contribute to the international dimension of the **Pact for Skills**[393].

More broadly, the international dimension of Erasmus+ and initiatives such as Study in Europe strengthen Europe's attractiveness as a destination for education, research and talent.[394] Beyond their educational objectives, these initiatives also contribute to people-to-people exchanges, enhance Europe's international visibility and generate additional tourism flows associated with student mobility, academic exchanges and visiting friends and relatives travel.

The **EU Talent Pool**[395] is another important element of the EU's efforts to address labour shortages while facilitating legal pathways for migration. It is the first EU-wide platform enabling employers in participating Member States to recruit third-country jobseekers residing outside the European Union. Jobseekers will be able to register their skills, qualifications, work experience and language proficiency, while employers will gain access to a broader pool of candidates for occupations facing labour shortages at all skill levels. Participation by Member States is voluntary.

The Talent Pool also supports the implementation of **Talent Partnerships**[396], which aim to better match the skills developed in partner countries with labour market needs in the European Union.[397] Jobseekers who have acquired skills through a Talent Partnership will be able to indicate this in their profiles on the EU Talent Pool platform. Tourism and hospitality are among the priority sectors in several Talent Partnerships currently being developed with Morocco, Tunisia, Egypt, Pakistan and Bangladesh, creating opportunities to strengthen skills cooperation while supporting legal mobility pathways.

The Strategy further strengthens the international dimension of tourism skills by promoting cooperation with partner countries and making full use of existing EU instruments and partnerships.

Example: EU Talent Partnership with Morocco

Morocco is one of the North African partner countries actively involved in the Talent Partnership programme with the European Union, identifying tourism as priority sectors. The Partnership helps address these issues by supporting fair recruitment, skills recognition, and mobility in line with decent work standards. It aims to promote legal, safe and orderly migration channels, while helping to address the skills needs of European labour markets.

3.4.3 Strengthening international connectivity

International engagement in tourism is closely linked to connectivity and mobility, and to air connectivity in particular. Direct and diversified connections with key international markets

[393] European Commission, Directorate-General for Employment, Social Affairs and Inclusion, Pact for Skills, accessed November 2026
[394] European Commission, Directorate-General for Education, Youth, Sport and Culture, Study in Europe, accessed November 2026.
[395] Regulation (EU) 2026/1047 of 29 April 2026 establishing an EU Talent Pool, Official Journal of the European Union, May 2026.
[396] European Commission, Directorate-General for Migration and Home Affairs, Talent Partnerships, May 2025.

are important for the competitiveness and accessibility of European destinations, while also supporting tourism and economic development in partner countries.

By improving direct and diversified access to European destinations, aviation agreements contribute to more balanced tourism flows, including improved geographical and seasonal dispersal, while reinforcing connectivity with key partner countries. They also provide more connections and affordability for both European and non-European travellers, while contributing to economic growth and employment on both sides. Wider access to different markets also contributes to the resilience of tourism connectivity by enabling European airlines to adapt more easily to changing market conditions and external disruptions, while establishing a healthy level playing field with their competitors.

For these reasons, the Commission will continue promoting agreements that strike the right balance between granting a diversified and affordable access to travellers and, at the same time, fostering beneficial competition among carriers.

3.4.4 Facilitating travel to Europe through modern border and visa management

The attractiveness and competitiveness of Europe as a tourism destination depend not only on air connectivity and the quality of its tourism offer, but also on the ease, predictability and security with which international travellers can enter the European Union. Visa policy, border management and travel facilitation therefore constitute important enabling conditions for tourism, business travel and people-to-people exchanges, while fully respecting the Union's security objectives and the integrity of the Schengen area[398].

Stakeholder consultations carried out in preparation of the Strategy confirmed the importance of efficient and predictable entry procedures for Europe's tourism competitiveness. Stakeholders highlighted that lengthy visa procedures, limited appointment availability and uncertainty regarding processing times may discourage travel, particularly from rapidly growing long-haul source markets. They also stressed that visa complexity may affect business travel, investment missions and professional exchanges, while the successful implementation of the Entry/Exit System (EES) will be important for maintaining a positive visitor experience. Although stakeholders recognised the long-term benefits of digital border management, they emphasised that operational challenges during the transition period, including extended waiting times at certain external border crossing points, could temporarily affect the attractiveness of European destinations if not adequately addressed[399].

The EU operates one of the world's largest common travel areas. The list of countries whose citizens benefit from visa-free travel to the EU has steadily grown, now including 64 countries and territories, more than any other similar travel destinations. The **Schengen area** enables seamless travel across participating countries through the absence of internal border controls, while a common visa policy provides harmonised rules for short-stay travel by nationals requiring a visa. Together, these arrangements contribute to the functioning of the internal

[398] European Commission, Directorate-General for Migration and Home Affairs, Smart Borders, April 2026.
[399] Stakeholder consultations carried out in preparation of the EU Sustainable Tourism Strategy, including contributions from TUI Group, ETOA, WTTC and other tourism stakeholders (2025-2026). Internal consultation material.

market, facilitate tourism and business travel, and enhance the international attractiveness of Europe as a destination[400].

The Commission has progressively modernised the EU visa framework to improve both efficiency and user experience. The **EU Visa Policy Strategy** places particular emphasis on the digitalisation of visa procedures, the wider use of multiple-entry visas for trusted travellers and measures to facilitate legitimate travel while maintaining high security standards[401]. These developments form part of a broader approach that seeks to combine secure external border management with facilitation for bona fide travellers.

The **European Travel Information and Authorisation System (ETIAS),** once operational, will enable advance security and migration risk screening before travellers arrive at the EU's external borders[402]. It will introduce a pre-travel authorisation requirement for visa-exempt third-country nationals, aligning the EU with similar systems already operated by several international partners. By enabling advance risk assessment while facilitating the processing of low-risk travellers, ETIAS is expected to contribute to both security and a more predictable travel experience.

Taken together, these developments illustrate the broader digital transformation of the management of the EU's external borders. When fully implemented, the combination of modernised visa procedures, ETIAS and the interoperability architecture is expected to strengthen security while supporting more efficient and seamless travel to Europe. For the tourism ecosystem, reliable, transparent and user-friendly entry procedures contribute to maintaining Europe's attractiveness as a global destination, particularly in increasingly competitive long-haul markets.

3.4.5 Destination Europe

Beyond connectivity and policy cooperation, strengthening Europe's position as the world's leading tourism destination also requires a coherent international positioning. Destination Europe seeks to articulate Europe's shared values and strengths by positioning Europe as a "destination of destinations". It provides a common strategic framework that complements national, regional and local destination brands, showcasing Europe's diversity and supporting more balanced tourism flows.

The concept of Destination Europe builds on the Commission's long-standing cooperation with the European Travel Commission (ETC). Since 2012, ETC has received successive EU co-funded action grants supporting promotional activities to strengthen the image and profile of Europe as a collection of sustainable and high-quality destinations. Over time, this cooperation has progressively evolved from joint marketing campaigns towards a broader approach combining market intelligence, business-to-business promotion, digital communication and

---

[400] Regulation (EC) No 810/2009 of 13 July 2009 establishing a Community Code on Visas (Visa Code), p. 1, Official Journal of the European Union, September 2009; European Parliament and Council of the European Union, Regulation (EU) 2016/399 of 9 March 2016 on a Union Code on the Rules Governing the Movement of Persons across Borders (Schengen Borders Code), p. 1, Official Journal of the European Union, March 2016.

[401] European Commission, Communication from the Commission to the European Parliament and the Council on EU Visa Policy Strategy, COM°(2026)°43 final, January 2026.

[402] Regulation (EU) 2018/1240 of 12 September 2018 establishing a European Travel Information and Authorisation System (ETIAS) and amending Regulations (EU) No 1077/2011, (EU) No 515/2014, (EU) 2016/399, (EU) 2016/1624 and (EU) 2017/2226, p. 1, Official Journal of the European Union, September 2018.

common promotional tools, including the development of the VisitEurope.com portal[403] and Joint Promotion Platform.[404] More recently, activities have increasingly focused on promoting sustainable tourism, lesser-known destinations and year-round travel.

Market intelligence confirms both Europe's continued appeal and the importance of a clear international positioning. In early 2026, 42% of surveyed long-haul travellers across seven key overseas markets were considering a trip to Europe during the year, while safety was the leading criterion for selecting a European destination, cited by 51% of respondents. Culture and history remained the most popular planned activities, alongside gastronomy, city breaks and nature-based experiences.[405]

Building on this experience, the Strategy expands the concept from a promotional initiative towards a broader policy framework, integrating branding with destination management, sustainability, connectivity and international partnerships.

Consultation activities undertaken in preparation of the Strategy, complemented by the Branding Destination Europe workshop of January 2026, demonstrated broad support for strengthening Europe's international positioning through a more coherent European narrative. They also highlighted the importance of ensuring that any common approach remains voluntary, complements existing national, regional and local destination brands, and supports broader policy objectives, including more sustainable and balanced tourism. Taken together, these findings provide the analytical basis for the progressive development of the Destination Europe framework.

Branding Destination Europe workshop: key conclusions

In January 2026, the Commission convened around 125 representatives from Member States, national tourism organisations, destinations, industry, international organisations and branding experts to discuss the future of Destination Europe. The workshop combined keynote presentations, panel discussions and interactive breakout sessions on governance, implementation and branding concepts.

The workshop highlighted broad convergence around the following principles:

- Destination Europe should provide a shared European narrative, complementing national, regional and local destination brands.
- Implementation should remain voluntary, supported by appropriate governance arrangements, common tools and close cooperation between the Commission, Member States and the European Travel Commission.
- The framework should build on shared European values, including sustainability, quality, cultural heritage and diversity.
- The framework should support more balanced tourism, including the promotion of lesser-known destinations, year-round travel and longer stays.

[403] European Travel Commission, Visit Europe: The Official Travel Portal of Europe, accessed November 2026.
[404] European Travel Commission (ETC), Joint Promotion Platform, accessed November 2026
[405] European Travel Commission (ETC) and Eurail B.V., Long-Haul Travel Barometer 1/2026, February 2026.

- Destination Europe should contribute to strengthening Europe's international visibility and competitiveness while respecting the diversity of European destinations and the principle of subsidiarity.

The workshop also highlighted that Destination Europe should be developed progressively through pilot actions, practical implementation tools and continued cooperation with Member States and the European Travel Commission, allowing the framework to evolve over time while respecting national competences and destination diversity. The framework can particularly benefit destinations and tourism businesses with high-quality tourism offers but more limited capacity to reach international markets independently, while complementing rather than replacing established national and regional brands.

Against this background, joint European promotion can serve not only to strengthen Europe's visibility in global markets but also to support a more balanced distribution of tourism demand across destinations and seasons. Promoting lesser-known destinations, year-round experiences and longer stays can help spread the economic benefits of tourism more widely and reduce pressure on mature destinations and peak periods.

Chapter 4. Governance and review

Questions of (good) governance come natural for a diverse industrial ecosystem like tourism, characterised by a multitude of private and public stakeholders that range from very small to very large, from local to multi-national. And indeed, suggestions to improve cooperation regularly emerge from consultations and feature in policy positions (see Chapter 2). Some Member States have developed carefully calibrated national approaches, including regulatory, spanning all administrative levels and providing backbone management infrastructure and services. This Strategy has no intention to touch these structures. But, in line with calls and expectations from the sector, it proposes to streamline information and cooperation flows for issues where cooperation at EU level has strong added value, e.g. on skills, data, simplification, management tools or external promotion.

4.1 EU Tourism Alliance

Tourism is inherently place-based, rooted in local assets and identities, while simultaneously operating across regional, cross-border and macro-regional traveller flows. In Europe, this **multi-layered reality** should be its defining strength, since it combines local authenticity with the scale and diversity of an integrated continental market. But making full use of this strength requires a constantly adjusted and delicate balancing of decision-making, public and private, and between local, regional, national and EU levels. European tourism needs a credible and representative EU cooperation structure to set priorities, align work on innovation and investment, and to support the scaling up of success stories as a basis for long-term competitiveness.

Today, tourism remains structurally under-coordinated in Europe, fragmented across multiple fora and short-term initiatives that lack strategic direction, continuity and scale. As a result, innovation, investment and policy influence are dispersed. This fragmentation undermines the sector's resilience and competitiveness. It limits the ability of destinations – especially smaller ones – to manage risks and transitions effectively and undermines coherence with EU-wide objectives such as the Clean Industrial Deal, the Competitiveness Compass and the Digital Decade.

Three interlinked challenges must be addressed at European level:

1. The first is to effectively **coordinate** inputs from Member States and experts across policy, technical and territorial domains and to steer joint action from innovation to scaling up and roll out. This requires effective information flows, priority setting, and sign-off on policy recommendations.
2. The second is to ensure **strong and structured partnerships between the public and the private sector.** Without this, smart destination management cannot have a meaningful impact, given the central role of businesses in shaping demand, data, services and innovation.
3. The third is to better **connect tourism with other sectoral policies** that influence it, ensuring that the interests of the tourism ecosystem are duly considered, while providing stakeholders with clarity on the rules and conditions affecting their activities.

These challenges call for public and private actors in the EU tourism ecosystem to establish a jointly owned, credible and transparent EU cooperation framework, capable of articulating

common priorities, integrating existing initiatives and providing continuity beyond political and funding cycles. This vision is complementary to local, regional and national responsibilities in and for tourism. It is aimed at creating structural value added through developing synergies and pragmatic, long-term operational perspectives. It is anchored in strong Member State endorsement.[406]

The objective is to create a structured public–private partnership driving and overseeing implementation of the EU Tourism Strategy and representing the shared interests of the tourism sector. The principal added value of the Alliance is therefore organisational rather than directly quantifiable in economic terms: reducing fragmentation, creating continuity between individual initiatives and enabling solutions developed in one part of the tourism ecosystem to be shared, adapted and scaled up elsewhere. Its direct beneficiaries will be the public and private stakeholders participating in EU tourism cooperation, while stronger coordination should support more coherent implementation of the Strategy for the wider ecosystem.[407]

In practice, the work of the Alliance will focus on delivering on common priorities for the EU tourism ecosystem and ensuring coherence between them, transparently and in partnership. The following examples may serve as illustration of the expected operational flows and policy impact:

Example:

EU Strategy for Sustainable Tourism – priority action area EU Tourism Data Space

- The EU Tourism Data Space project governance ensures routine operations, EU and MS co-funded – including, possibly, on basis of a regulatory foundation (EDIC, regulation, other).

- The EU Tourism Alliance ensures policy oversight and gives policy steer – with a focus on integration of the Data Space with/into other work strands (EU Model of Tourism Management, Balanced Tourism Recommendation and toolbox, EU Tourism Academy, AI, innovation, simplification, ...) and on any necessary developments of the Data Space in a medium to long term perspective.

- The EU Tourism Alliance also helps promote the Data Space within the wider potential user community (via EU Tourism Community) and seeks feedback on how well Data Space design and operations meet user needs, including testing for/of new functionalities and developments.

4.2 EU Tourism Platform

Effective cooperation across the tourism ecosystem requires not only appropriate governance structures, but also accessible tools through which information, knowledge and opportunities can circulate between stakeholders. The **EU Tourism Platform**[408] provides the digital

[406] European Commission, Report from the Commission to the Council on the Implementation of the European Tourism Agenda 2030, COM°(2025)°763 final, December 2025.
[407] OECD, OECD Tourism Trends and Policies 2026, Chapter 2, "Tourism policies, priorities and governance", OECD Publishing, Paris, July 2026.
[408] European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, EU Tourism Platform, accessed November 2026.

cooperation infrastructure supporting the implementation of the Strategy and the work of the EU Tourism Alliance.

The Platform serves as a **central entry point for EU-level tourism information and cooperation**, bringing together relevant policy developments, tools, knowledge and funding opportunities. It facilitates access to EU initiatives and resources, supports exchanges between public authorities, destinations, businesses, academia and other tourism stakeholders, and provides pathways for stakeholders to contribute to relevant EU tourism work. By bringing these resources together in one place, it also helps improve the visibility and accessibility of the support available to the tourism ecosystem.

The Platform will progressively evolve in line with the needs of the sector and the implementation of the Strategy. **New functionalities will facilitate more practical forms of cooperation between tourism stakeholders**, including tools enabling destinations facing similar challenges to identify each other, exchange experience and develop common solutions. It will also provide access to knowledge and resources developed under the Strategy, including a **repository of crisis management tools and practices**, and progressively connect stakeholders with relevant cooperation and funding opportunities.

The Platform also hosts the **EU Tourism Forum**, providing an open space for stakeholders across the tourism ecosystem to exchange experience and good practices, contribute ideas and provide feedback. In this way, it complements the representative and strategic role of the EU Tourism Alliance by enabling broader and continuous engagement across the European tourism ecosystem and providing a channel between the Alliance and the wider tourism community.

4.3 Review and reporting

Progress – and any lack of progress – in implementation of the Strategy will be regularly monitored by the EU Tourism Alliance. To that effect, the Alliance will be invited to agree on a limited series of indicators. This assessment will integrate reporting on the Agenda 2030 and address relevant positions of the European Parliament, the Council, the Committee of the Regions and the European Economic and Social Committee. The monitoring process should identify any need for readjusting and further developing measures under the strategy or for adding new actions, to be subject to an assessment of feasibility by the Commission. On the basis of its regular monitoring, the Commission, working closely with the Alliance, could consider any need for strengthening governance and delivery mechanisms, including legislative, under Article 195 TFEU.