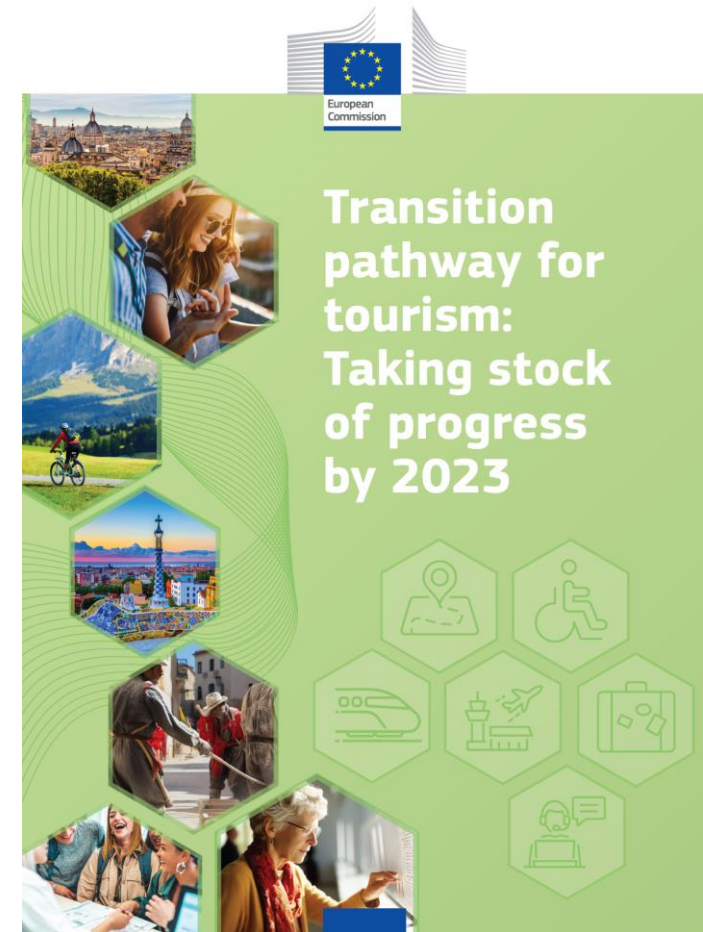


Taking stock: Transition of the tourism ecosystem



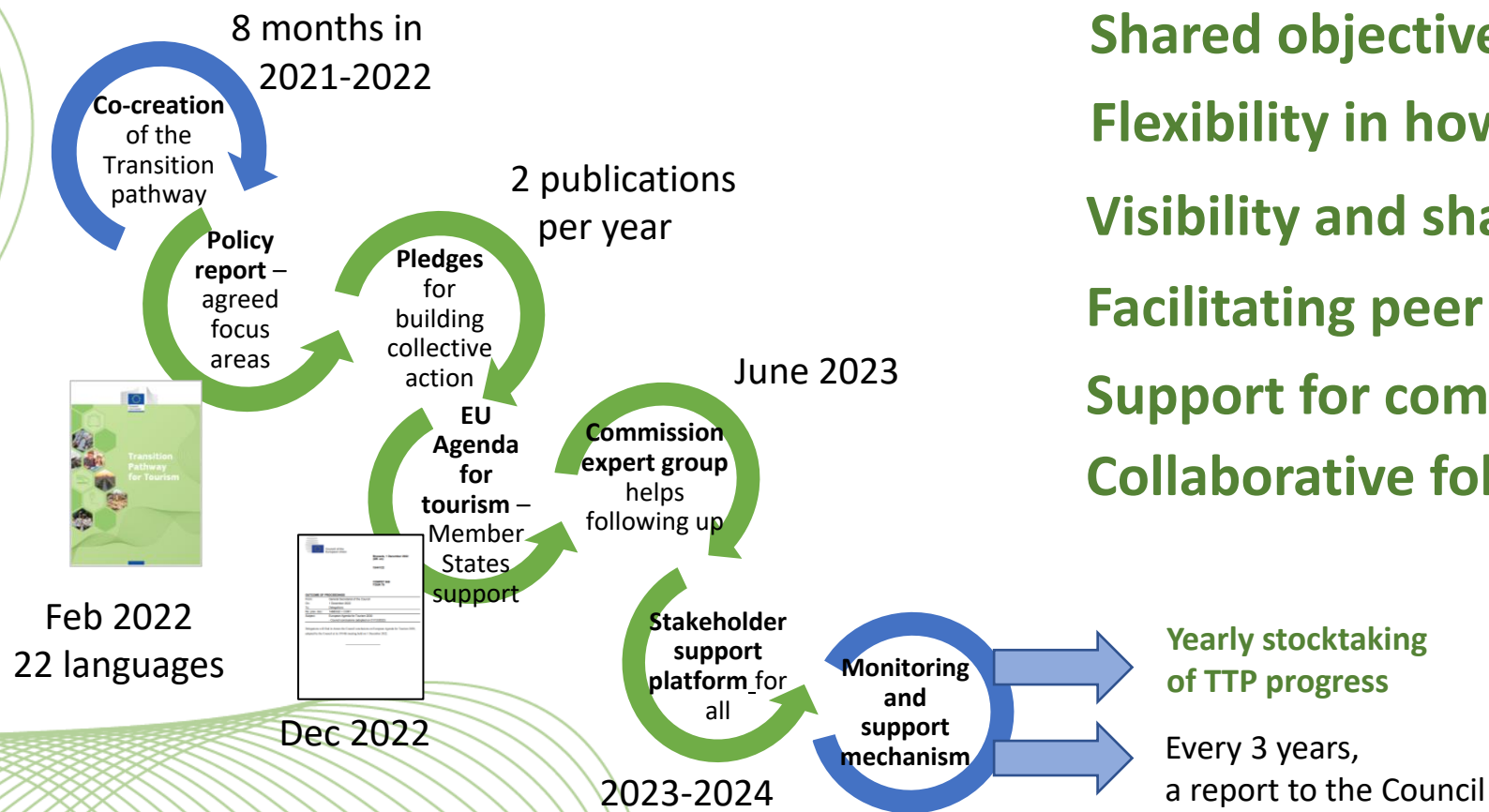
Kirsti ALA-MUTKA
European Commission (DG GROW)

How did we get here?



Available at
[Publications Office website](#)

Key elements of the Transition pathway for tourism



- Continuous co-creation
- Shared objectives and areas of action
- Flexibility in how to get engaged
- Visibility and sharing of good practices
- Facilitating peer learning
- Support for common challenges
- Collaborative follow-up

.. and we followed this approach in the stock-taking

- Aligning follow-up of Transition pathway for tourism with EU Agenda 2030
- Collecting inputs and data from several reported sources
 - Examples and evidence of visible actions and achievements by 2023
 - Showing the progress of collective effort of all key groups of actors – Commission, Member States, Stakeholders
 - Defining change indicators for example issues – where data available
- Building on extensive consultations, to maintain the collaborative approach
- Recognising that this is learning-by-doing – to be updated and improved in following years
- Creating a framework to build progressive and comparable knowledge that contributes to the 3-yearly reporting on the EU Agenda for Tourism 2030 to the Council



It is a very dense report ... but you can choose how to use it

- **State-of-art summary** of recent policy developments
- **Go-to-guide** for recent data and statistics
- **Evidence** of real change being in progress, through many individual actions across Member States, public and private actors, localities, individuals
- **Rationale** for decision-makers, collaborators, bosses to start supporting and taking action towards new ways of tourism
- **Inspirational examples** about practical actions
- **Overview** of the broad scale of the tourism ecosystem and its elements of transformation



Today – focus on 3 perspectives

1. Progress across 5 main transition dimensions
2. Engagement and achievements of key groups of actors
3. What have we learnt?



First perspective

1. Progress across 5 main transition dimensions

- Policy and governance
- Green transition
- Digital transition
- Resilience and inclusion
- Skills and stakeholder support



Progress on policy and governance topics

- Overall **highest stakeholder engagement**: From the 6 topics with most pledges, three are in this group
- Developing tourism strategies is the **most progressed action topic of all** showing equally active progress by all actor groups
- Public administrations at all levels are most active in tourism data and statistics (14 pledges)
- SMEs and NGOs support public actors for strategies, measurements
- EU-level legal actions in a key role – STR regulation, mobility data sharing, proposals for passenger rights – but need MS support

Short-term rentals

Multimodality

Tourism
measurements

Tourism strategies

Destination
governance

Example of a change indicator to be followed:

- Number of Member States having established a single digital entry point for platforms to deliver data on short-term rentals

Progress on green transition topics

- **Single most popular topic:** Green transition of tourism companies had 45 pledges (10.6%), of which almost half report being fully completed
 - Business associations in a leading role (11 pledges)
 - SMEs actively part of transition (9 pledges)
- Regional administrations showing more pledges than national administrations (but Member States report through TAC as well)
- PEF has little progress – needs Commission support to launch the development of the PEF category rules and collection of datasets that can facilitate its use
- R&I efforts difficult to estimate – using as a proxy Horizon Europe but will improve coverage in the future with T4T online platform

Sustainable mobility

Circularity of services (and climate)

Greening of companies

R&I and pilots

(PEF) Product Environmental Footprint methods

Example of a change indicator to be followed:

- 140.1 million overnight trips made by train in 2022 (Eurostat)

Progress on digital transition topics

- Overall **less progress than in green transition** across the topics
- Most engagement in digitalization of SMEs and destinations
 - Business associations leading (6 pledges)
- Actions on digital take-up strongly linked to providing digital skills training
- Difficult to track relevant R&I for digital transition in tourism – often linked with sustainability at the same time
- European Monitor of Industrial ecosystems study providing key information with an annual ecosystem-adjusted survey

Innovative tourism services

Online information

Data sharing (data space)

Digital take-up SMEs and DMOs

R&I with digital tools

Example of a change indicator to be followed:

- 53.2% of accommodation and food enterprises having at least basic digital intensity

Progress on resilience and inclusion topics

- COVID-19 related action on information sharing on travel restrictions can be closed after lessons learnt have been published – advancing towards supporting general crisis management capacity?
- Decent and attractive tourism jobs considered a priority by 13 Member states, but not many concrete practices shared, neither many pledges – needs further attention
- EU level legislative actions to support equality in jobs (CSRD, Gender equality), and address labour shortages (Talent pool)
- Topic 26 most broad topic of all: actions on diversification of services, tackling over-crowding, inclusion to specific groups, monitoring resident satisfaction, cultural tourism

Cross-border travelling
Info on travel restrictions
Fair and good jobs
Access for all
Resilience (diversification, wellbeing)

Example of a change indicator to be followed:

- Tourism seasonality (45% for all EU) – to be explored at regional levels (EU Tourism Dashboard)

Progress on skills and support topics

- Skills are recognized as important by all, but show less progress than expected – 56 000 trained in 2022 based on DG EMPL survey – less than half of targeted 10% of tourism workforce
- Skills support is also linked to actions expressed under the green and digital transition – enabler for everything
- Business associations (6 pledges) and regional administrations (4 pledges) most active actors to support reskilling and upskilling of the workforce
- Efforts on raising awareness on skills needs and twin transition not very advanced – need more action as they support the engagement of all types of actors

Example of a change indicator to be followed:

- 6 national/regional skills partnerships established by 2023 ([based on PANTOUR website](#): BG, IE, IT, HU, NL, ES)

Skills needs

Awareness on transition needs

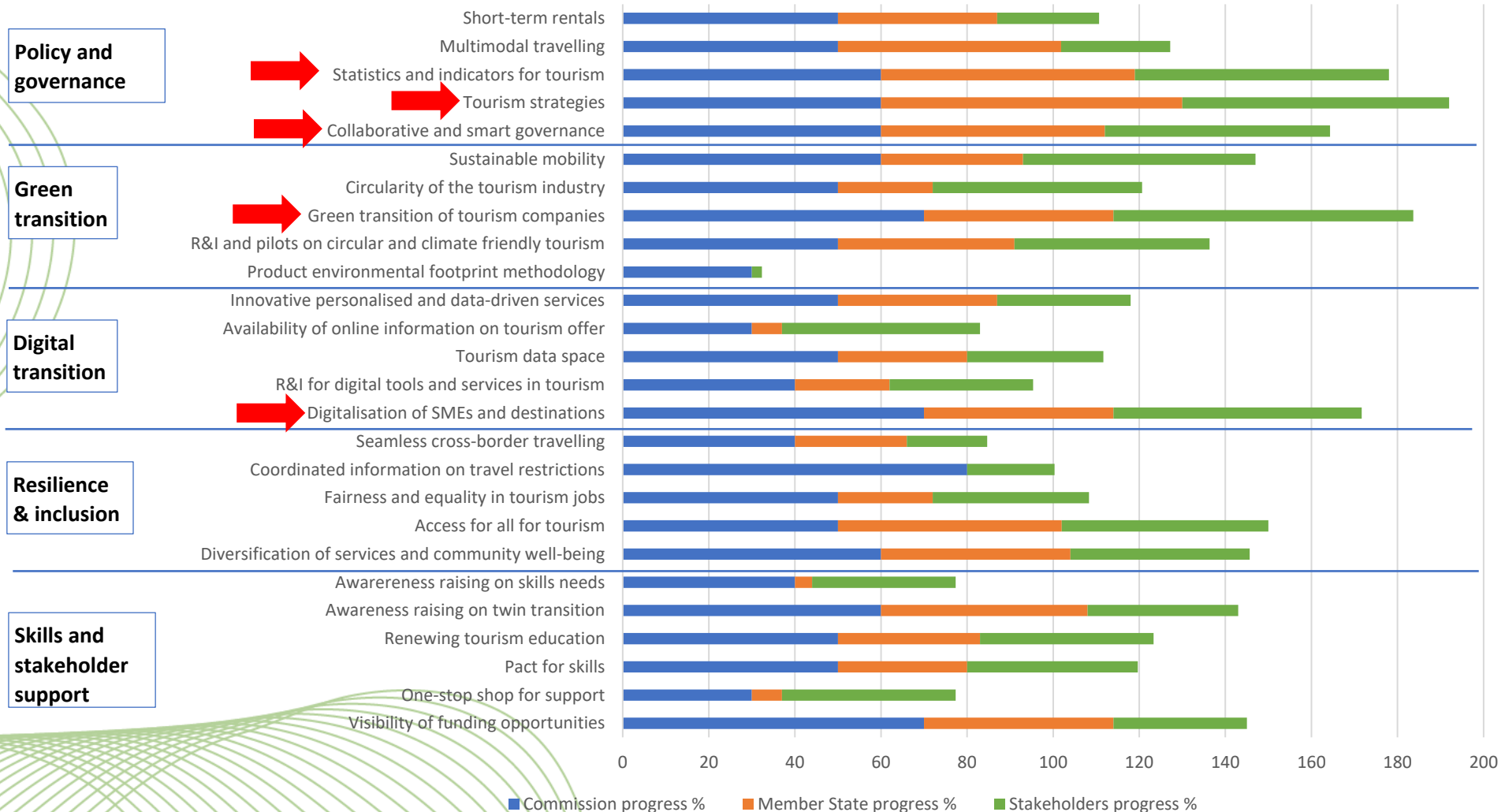
Renewing formal education

Pact for Skills for reskilling/upskilling

One-stop-shop for resources, peer learning, best practices

Info on Funding opportunities

Overview of effort progress* for all topics – to be compared with 2024 values



*based on information collected through TAC reporting, pledges and T4T expert group

Second perspective

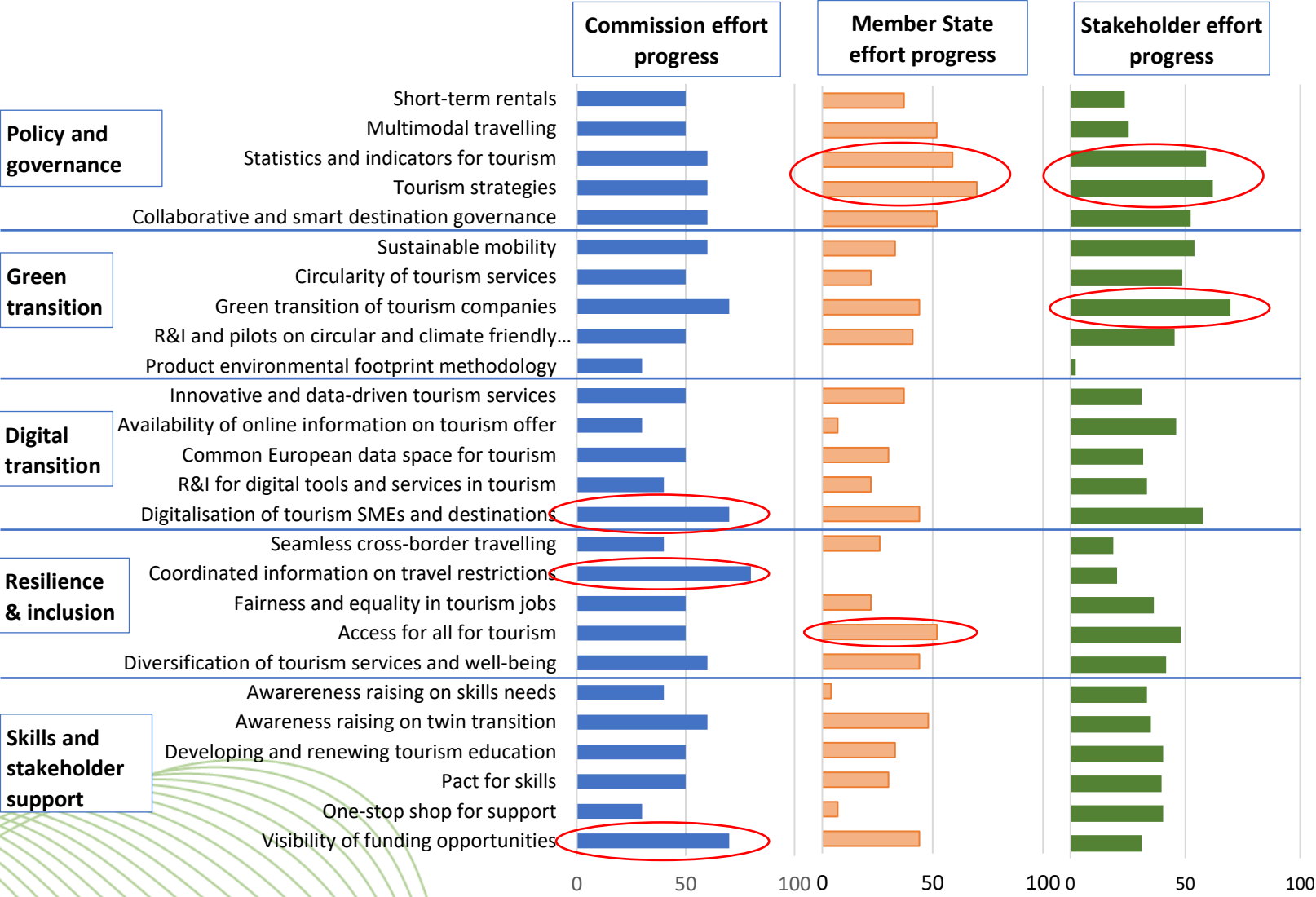
2. Engagement and achievements by key groups of actors

- European Commission
- Member States
- Stakeholder community

Everyone has their specific role to play!



Reported effort progress* per key groups



*based on information collected through TAC reporting, pledges and T4T expert group

Concrete measures by the Commission

- Several new/revised **legislative** proposals and adopted acts by end of 2023:
 - STR regulation, Passenger mobility package, Package Travel Directive, Fit for 55 package, Waste Framework Directive, Packaging and Packaging Waste Directive, Empowering Consumers for Green Transition Directive, Green Claims Directive, Digitalisation of Schengen visa procedure, Corporate Sustainability Reporting Directive, European Disability Card Directive, EU Talent Pool, ...
- **Policy** communications and support measures
 - Smart Tourism Capitals, Green Pioneer of Smart Tourism, EU Tourism Dashboard, Communication on Common European Data Space for Tourism, EU Declaration on cycling, several City awards
- **Funding** calls and measures for tourism ([Guide on EU funding for Tourism](#))
 - Projects under Single Market programme providing direct assistance to SMEs
 - Pilot projects and studies (many with Parliament support)
 - Urban Agenda partnership on sustainable tourism, Technical Support Instrument, Funding across several programmes (DEP, Horizon Europe, Erasmus+, ERDF, ...)
- **Continuous support for SMEs and companies** at EU level:
 - Enterprise Europe Network (with sustainability advisors), European Digital Innovation Hubs, EU cluster collaboration platform, Erasmus for Young Entrepreneurs
 - EU ecolabel, EU Eco-management and Audit Scheme, EURES portal

Member States show active engagement

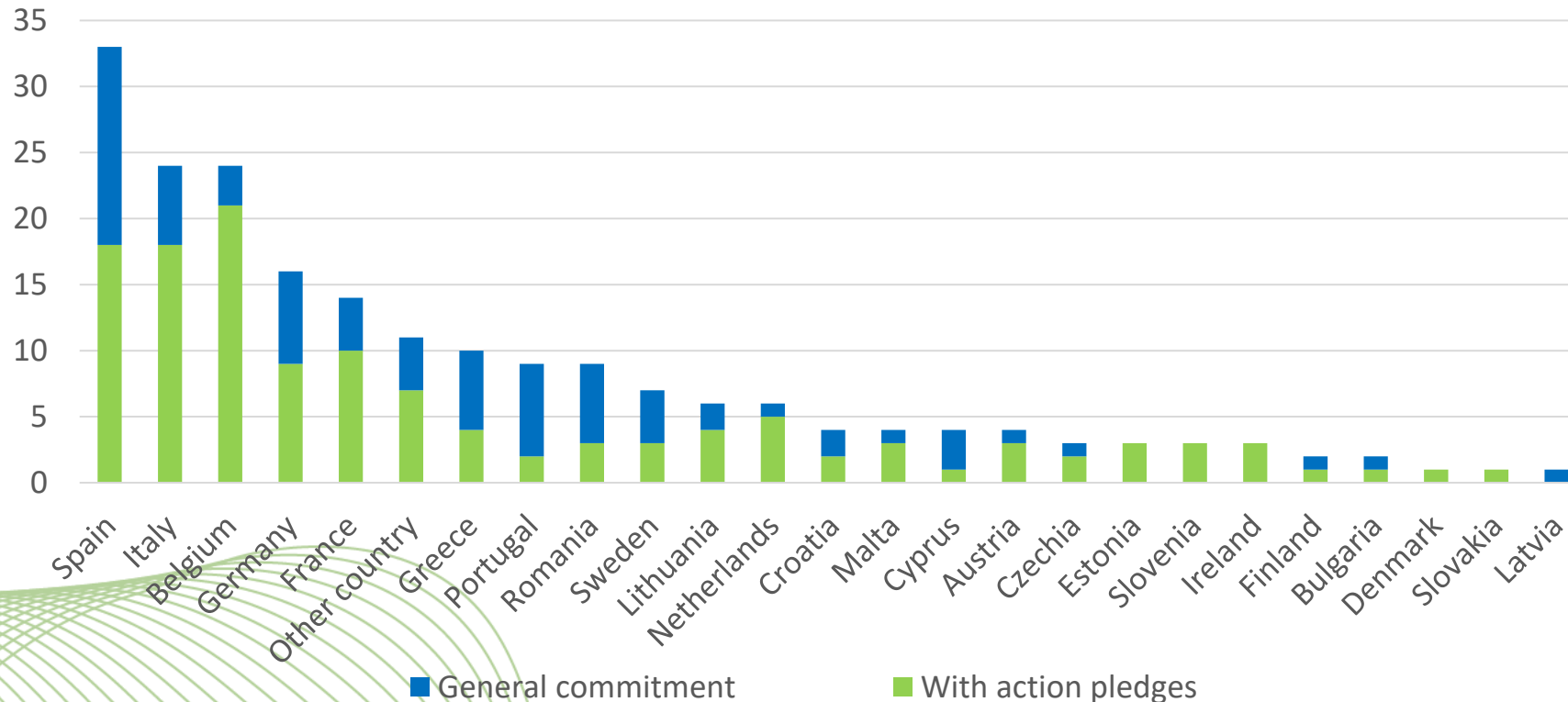
- Multiannual workplan of EU Agenda for Tourism 2030 with several actions
 - 25 Member States reported on their EU Agenda/TTP related actions through Tourism Advisory Council annual online reporting
 - Separately published [Best practices document](#) on the concrete actions reported by Member States
- Additionally national public administration actors from 11 MS have submitted pledges. Most commonly on: Data and measurements for tourism, Comprehensive strategies
- 10 MS reported a strategy/action plan updated 2022 or later including economic, environmental and social sustainability
- Well-being of residents was considered a priority of 17 Member States, followed by Digitalisation for data-driven destination management, Diversification of tourism services, Reducing environmental impact of tourism services
- Most commonly reported measures were Accessibility (14 MS), followed by Awareness raising, Data and measurements, Collaborative Destination Governance

Stakeholders – key actions

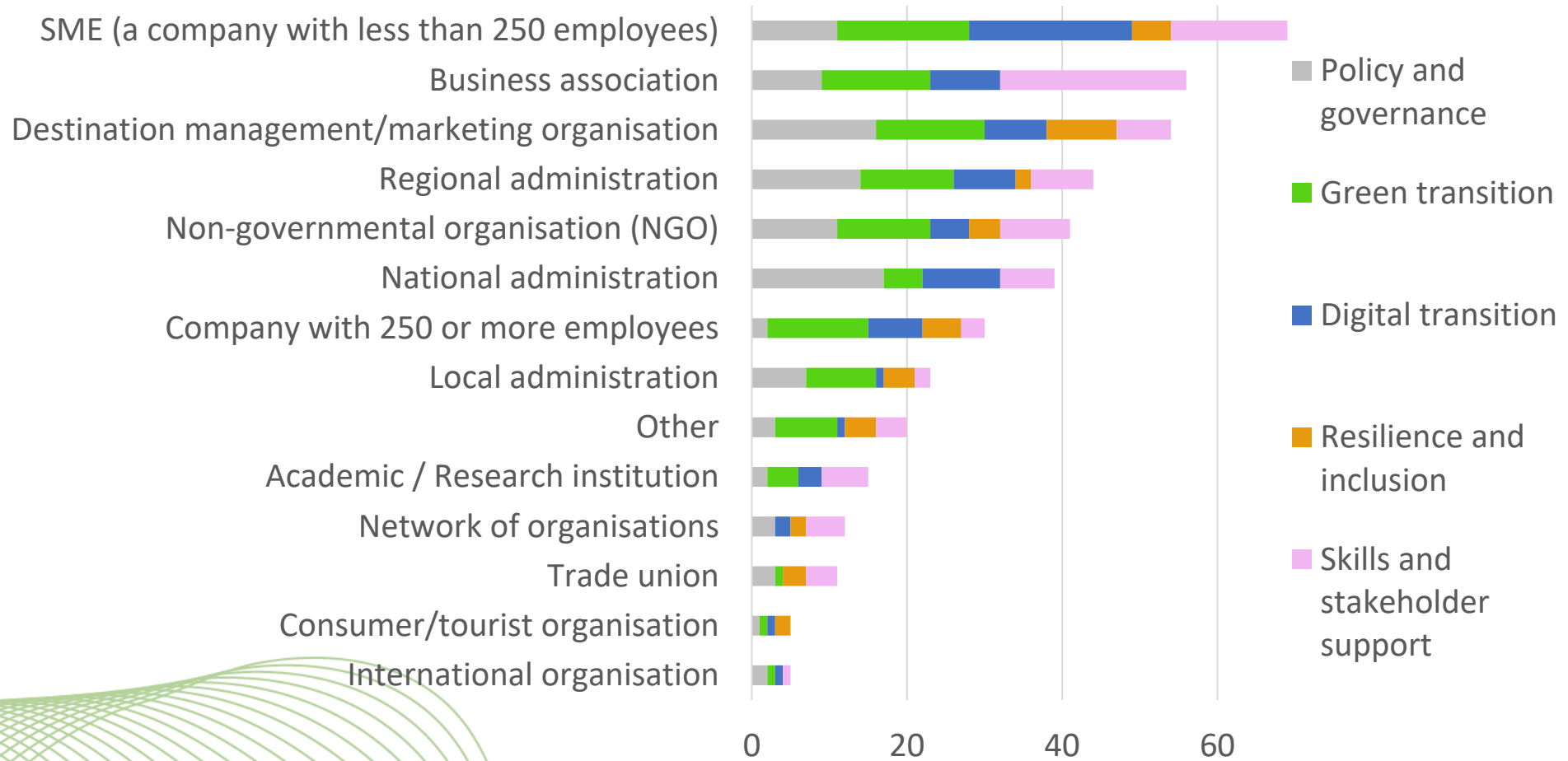
- Key achievement: Establishing the T4T informal Commission expert group
 - To inform Commission about stakeholder needs
 - To design systematic awareness raising and engagement of stakeholders on priority topics each month – with the help of the platform
 - To develop and pool expert knowledge to provide advice for the Commission
 - To help everyone to progress in the transition and follow the progress
- Continuous collection of pledges demonstrates engagement across all groups of actors and all topics – evidence of actions and example ideas for all
 - 424 pledges published by October 2023
 - Pledges coming most often from SMEs (16%), Business associations (13%), and DMOs (13%)

Stakeholder engagement through pledges

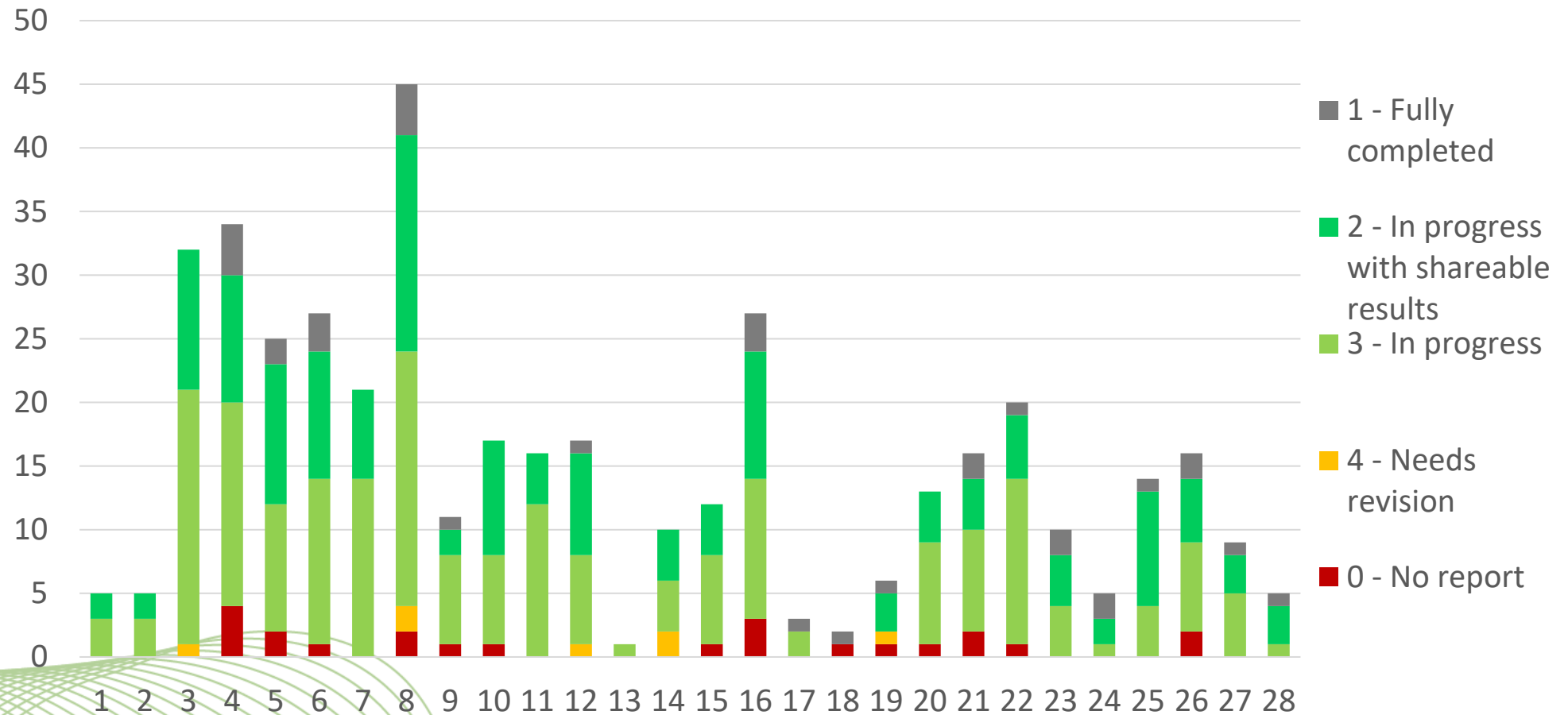
- 204 organisations from 24MS + 10 other countries – 68% with pledges
- **Not yet actors from all MS reached – and sometimes 1-2 organisations only**



Areas of pledges by type of organisation



Reported progress on pledges



Third perspective

3. What have we learnt?

- Lessons from the stock-taking
- Key challenges ahead
- Plans for 2024 stock-taking



Lessons learnt



- Taken actions and results have shown that **identified TTP areas are considered relevant** to support EU tourism competitiveness and resilience through green and digital transition
- Stakeholders have taken cross-topic actions in many cases, benefiting from **TTP as an inspiration and not seeing it as a limiting structure**
- Some originally defined objectives have been already achieved although plenty of work still remains ahead – **we should not limit to original objectives only**
- Some issues integrated under current topics have raised in attention lately: Climate change adaptation and mitigation, Energy efficiency, Overtourism and **could merit new dedicated topics** in the future
- This years stock-taking is a snapshot, first learning experience for all -- the **usefulness of the exercise and its results will increase when it is repeated**
 - Comparing progress across years
 - Streamlining engagement of actors to the monitoring process and reporting

Priorities and challenges



- Much more **awareness raising necessary** – especially at local levels, across the EU
- Dedicate effort to **broaden the basis of pledges** (all MS, different organization types in them) – to have more concrete examples for all types of actors
- Mechanisms **for stakeholders to easily find relevant examples – to valorise the pledges**
- **Specific effort on skills needed** – NRSPs, Communication campaign, sharing of training opportunities
- **Clear instructions and motivating rationale for SMEs** to engage in transition – why useful and what to do?
- Work towards **revising Regulation (EU) 692/2011 on Tourism statistics**
 - **All three T4T expert subgroups have launched work on tourism measurements** as a priority with an objective to provide suggestions by end of Q1/2024
- **Common European data space for Tourism** requires active engagement by all:
 - Governance model with active participation by Member States, for example through EDIC
 - EU-level support through common supporting infrastructure and tools (funded under DEP)
 - Engagement of all groups of relevant actors to data sharing and making value/use of it

Plans for 2024



Repeated but slightly refined stock-taking process

- Revised (easier) online reporting forms for Member States and Stakeholders pledge follow-up
- Broaden evidence beyond pledges and reports with T4T online platform and community contributors
 - For example, information on funded projects across EU and national programmes, other best practices
- One stakeholder consultation round with draft report in October-November
- Final report end of December/early January

New phase to collaboration: Regular T4T community facilitation with the online platform

- More user-friendly pledge submission and progress follow-up – continuous and with active guidance
- Continuous visibility and sharing of pledges to relevant actors through T4T online platform – news, articles, activities, tailored recommendations and searches
- Monthly transition focus topics activities prepared by T4T expert subgroups for the T4T community

Conclusions



- This first Transition pathway stock-taking exercise has built a **basis for annual follow-up** that contributes to **building knowledge for 3-yearly reporting** on EU Agenda 2030 to the Council
- It shows that all Transition pathway for tourism and EU Agenda 2030 **areas of action are progressing**, and continue being relevant, with some sub-areas raising in attention
- Continuing work is expected and needed in all areas, and especially on accelerating **Digitalisation and Skills/support**, which are key enablers for all other areas of the transition
- **Having data and indicators** to analyse needs, make decisions and follow progress at local, regional, national and EU level is a **key need recognized by all**, with several dispersed efforts – collaboration needed to optimize synergies – T4T expert subgroups have prioritized this as first area of action
- While gathering concrete examples of action remains a key task for TTP co-implementation, increasing attention should be given to **facilitating stakeholders to make use of this knowledge**
- **T4T expert subgroups and T4T online stakeholder support platform** will play a key role from 2024 onwards to help sharing useful knowledge with focused efforts to support all groups of stakeholders

Together for EU Tourism

Thank you!

- [Transition pathway policy report in 22 languages](#)
- [Transition pathway: Taking stock of progress by 2023](#)
- [Submission form for stakeholder pledges and commitments](#)
- [Published pledges and commitments for the transition of EU tourism](#)
- [Tourism transition pathway co-creation \(europa.eu\)](#)
- [Guide on EU funding for tourism \(europa.eu\)](#)
- [EU Tourism Dashboard](#)
- [Council conclusions on EU Agenda for Tourism](#)
- [Communication on Common European Tourism Data Space](#)

