

European tourism: recent developments and future challenges



Transport and Tourism



RESEARCH FOR TRAN COMMITTEE

European tourism: recent developments and future challenges

Abstract

This study provides an overview of the current state of affairs in European tourism, considering the latest developments, identifying future challenges and emerging opportunities. It draws a number of conclusions and makes recommendations at an EU policy level that will support the sustainable development of the sector.

This document was requested by the European Parliament's Committee on Transport and Tourism.

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LIST OF ABBREVIATIONS

CAP	Common Agricultural Policy
CF	Cohesion Fund
COSME	Competitiveness of Small and Medium-Sized Enterprises
CSR	Corporate Social Responsibility
DG EAC	Directorate General for Education and Culture
DG ENV	Directorate-General for Environment
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
DG RTD	Directorate-General for Research and Innovation
DMMO	Destination Management and Marketing Organisations
DMO	Destination Management Organisation
EAFRD	European Agricultural Fund for Rural Development
EaSI	Employment and Social Innovation
EASME	Executive Agency for Small and Medium-sized Enterprises
EC	European Commission
ECM	European Cities Marketing
EDEN	European Destinations of Excellence
EFSI	European Fund for Strategic Investments
EIB	European Investment Bank
EMAS	Eco-Management and Audit Scheme
EMFF	European Maritime and Fisheries Fund
EP	European Parliament
ERDF	European Regional Development Fund
ESF	European Social Fund
ESIF	European Structural and Investment Funds

ESPON	European Spatial Planning Observation Network
ETC	European Territorial Cooperation
ETC	European Travel Commission
ETIS	European Tourism Indicators System
EU	European Union
GCET	Global Code of Ethics for Tourism
GDP	Gross Domestic Product
GDS	Green Destinations Standard
GHG	Greenhouse Gas
GNI	Gross National Income
GSST	Green Scheme of Slovene Tourism
ICT	Information and Communication Technologies
IoT	Internet of Things
IP	Investment Platforms
LBS	Location Based Services
LGBTI	Lesbian, Gay, Bisexual, Transgender and Intersex
MEP	Member of the European Parliament
MFF	Multiannual Financial Framework
NECSTouR	Network of European Regions for Competitive and Sustainable Tourism
NTG	Next Tourism Generation Alliance
OECD	Organisation for Economic Co-operation and Development
OTA	Online Travel Agents
P2P	Peer to Peer
SBA	Small Business Act
SME	Small and Medium Enterprises

STB	Slovenian Tourist Board
TFEU	Treaty on the Functioning of the European Union
TSA	Tourism Satellite Accounts
TSG	Tourism Sustainability Group
UNWTO	United Nations World Tourism Organisation
USP	Unique Selling Points
VET	Vocational Education and Training
WCED	World Commission on Environment and Development
WCTE	World Committee on Tourism Ethics
WTO	World Trade Organisation
WTTC	World Travel & Tourism Council

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EXECUTIVE SUMMARY

Background

Global tourism has now grown for nine years in succession, with international arrivals reaching 1.4 billion in 2018, two years ahead of forecasts. Growth in tourism receipts continue to out-perform global Gross Domestic Product (GDP) and have now reached 1.7 trillion USD. Tourism now accounts for 7% of global exports, making it the world's third largest export industry.

Europe is ranked as the world's number one destination for international arrivals, 713 million in 2018, over half the global total, growing by 6% in 2018. Early indications are that 2019 will see further growth, although at more modest levels than 2018.

Tourism creates a surplus for the European Union (EU) economy, with international tourism receipts exceeding EU residents spending on international tourism by 27 billion in 2016. The industry represents around 6% of total EU export earnings, making it the fourth largest export industry.

Aim

This study aims to provide the Members of the TRAN Committee with an overview of the current state of affairs in European Tourism, considering the latest developments, and where possible identifying future challenges and emerging opportunities. It draws a number of conclusions and where appropriate makes recommendations at an EU policy level that will support the sustainable development of the sector.

Objectives

To support this the following objectives have been set:

- provide a comprehensive overview of the tourism sector in the EU;
- present an analytical overview of current and expected future developments relevant to EU tourism policy; to this end the study should describe between three to five recent (or emerging) trends likely to have a major impact on the sector;
- summarise current knowledge-based policy debates;
- focus on policy responses made so far at the EU level and on additional actions that could be taken to further boost the growth, competitiveness, sustainability and quality of EU tourism services;
- present a critical assessment of preparedness of the EU tourism sector to face the expected challenges and to reap benefits from the emerging new opportunities;
- offer a set of recommendations for EU policy makers, in particular for the Members of the European Parliament, on what could be done (especially at EU level) to further stimulate growth and competitiveness of the sector.

Recommendations

The study makes a number of recommendations in several areas of tourism, many of these are overlapping, as for example, new smart technologies can be used to both guide tourists around a destination, whilst encouraging them to make more sustainable choices as they do this.

Overtourism is an area that has gained prominence over recent years and if tourism is to become truly sustainable, the industry must adapt to new ways of thinking and more importantly acting. Develop strategies for tourists to be more environmentally sustainable and socially respectful when travelling. This should encourage tourists to start to think about how they travel to and behave at destination before they arrive. To support the strategies there must be investment in sustainable transport infrastructure to support the development of sustainable growth in tourism, which enables tourists to act as well as think.

The emergence of new technologies provides a significant opportunity to engage with tourists in ways that have not been possible previously. The EU should take the lead in promoting the development and use of these. As a first step, a much greater emphasis is needed on providing the skills, both for the existing and future workforces; so that the tourism is able to take full advantage of the opportunities it presents.

Whilst the EU should focus on strengthening 'Brand Europe', this needs to be coordinated with national, regional and local DMOs, to encourage a policy of 'Attract and Disperse', particularly away from those destinations that are suffering from too much tourism and towards those areas who would benefit from increased, sustainable, development.

The impacts of overtourism, congestion, unregulated development (Airbnb for example) often have a greater impact on local residents, than other stakeholder groups; yet they are the group that are most often excluded from the process. Ensuring that citizens groups have direct channels to the decision-making process and are appropriately resourced so that they are enabled in this process.

Given the importance of tourism to the EU economy and its potential social and environmental benefits and costs, tourism should have a much higher and more autonomous status within the structure of within the European Commission. This should include a specific tourism budget line and a dedicated and appropriately funded unit, perhaps in the short-term within the DG Internal Market, Industry, Entrepreneurship and SMEs (DG GROW), but in the longer-term as a stand-alone unit would allow it to coordinate better the needs of the tourism industry across the EU.

As already suggested, 'tourism' (industry, tourists and public bodies) in the EU, need to act as well as think more sustainably; environmentally, socially and economically (and politically). Tourism is responsible for 5% of global CO₂ emissions, around 75% of this is from the transport sector; air travel alone accounts for 40% of the industry's emissions. In particular, the EU should:

- Update the *European Charter on Sustainable and Responsible Tourism* with actions addressing more recent tourism challenges (such as over-tourism and under-tourism, individual carbon footprints, sustainable consumption patterns, etc.);
- Promote and implement the *European Charter on Sustainable and Responsible tourism* lines of action;
- Support the transition of the UNWTO Code of Ethics into a Convention and recommend it for adoption by EU Member States.

It is important that 'tourism' begins to act, not just think, sustainably.

1. INTRODUCTION

1.1. Context

Tourism is one of the largest and fastest growing sectors of the global economy. According to the World Travel & Tourism Council (WTTC) it was worth \$8.8 trillion in 2018 (around €7.9 trillion), outperforming the global economy for the eighth consecutive year¹ (WTTC, 2019). Early indications are that 2019 will see further growth, although at more modest levels than 2018.

Tourism creates a surplus for the European Union (EU) economy, with international tourism receipts exceeding EU residents spending on international tourism by 27 billion in 2016 (UNWTO, 2018a). The industry represents around 6% of total EU export earnings, making it the fourth largest export industry (ibid.). Although the EU accounts for 40% of international tourism arrivals, this only generates 31% of international tourism receipts (UNWTO, 2019a). However, visits to EU countries are not equally distributed, with the top five accounting for around half of total visits.

Table 1: Top five EU destinations (2018)

	Arrivals (million)	Value (billion US\$)
France	89	67
Spain	83	74
Italy	62	49
Germany	39	43
United Kingdom	36	52

Source: UNWTO (2019a)

The tourism sector comprises of over 2 million businesses employing over 13 million people. Over 60% of these are in the food and beverage industry, followed by the accommodation sector (20%) and transport (15%). Three industries rely almost entirely on tourism: accommodation, travel agencies/tour operators and air transport, account for around 28%, employing 3.6 million people.

1.2. Definitions

What is tourism?

The UNWTO define tourism as *"the activities of persons identified as visitors. A visitor is someone who is making a visit to a main destination outside his/her usual environment for less than a year for any main purpose [including] holidays, leisure and recreation, business, health, education or other purposes. ... This scope is much wider than the traditional perception of tourists, which included only those travelling for leisure."* (UNWTO, 2010)

Tourism includes the activities of individuals and businesses supplying services to the visitors, as well as the activities of the visitors themselves.

¹ 3.9% for travel and tourism versus 3.2% for global GDP

Visitors

Visitors are generally subdivided into three groups:

1. **Tourists**, are visitors staying away from their main home for at least one night. These include both domestic and international visitors.
2. **Day visitors**, are those spending at least three-hours away from their home and, although normally considered as domestic, can include cross-border or international trips. This group can be further sub-divided into two groups. Those spending:
 - over three hours away from their home, who are often visiting areas outside their normal environment, and
 - under three-hours away from home, who are more likely to be visiting their local area.

Visitors in all three groups can be visiting for the purposes of holidays, leisure, recreation, business, etc. However, the focus of this study is on the first group, tourists, as these are the group most closely associated with 'tourism' and more likely to be international, which falls within the scope of EU competences.

Tourism industry

The tourism industry is not a single industry but a group of industry classifications, which to a greater or lesser extent rely on tourism as their main source of income. The UNWTO list of tourism associated industries (or activities) are:

1. Accommodation for visitors
2. Food and beverage serving activities
3. Railway passenger transport
4. Road passenger transport
5. Water passenger transport
6. Air passenger transport
7. Transport equipment rental
8. Travel agencies and other reservation services activities
9. Cultural activities
10. Sports and recreational activities
11. Retail trade of country-specific tourism characteristic goods
12. Other country-specific tourism characteristic activities

Domestic tourism

It is the activities of a visitor or tourist within their own country of residence.

International tourism

This comprises of both inbound and outbound tourism:

- the activities of non-resident visitors within country on an inbound tourism trip, and
- the activities of a visitor outside their country of residence as part of an outbound tourism trip, which is not at their final destination.

1.3. Aims and objectives of the study

Aims

This study aims to provide the Members of the TRAN Committee with an overview of the current state of affairs in European Tourism, considering the latest developments, and where possible identifying future challenges and emerging opportunities. It draws a number of conclusions and where appropriate makes recommendations at an EU policy level that will support the sustainable development of the sector.

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- offer a set of recommendations for EU policy makers, in particular for the Members of the European Parliament, on what could be done (especially at EU level) to further stimulate growth and competitiveness of the sector.

1.4. Approach and methodology

The methodology is split into six tasks:

1. **Literature review** - focusing on three main areas: academic literature, studies, reports and other similar material, and grey literature.
2. **Review of European Union policies, initiatives and programs** - the most recent and pertinent of these were reviewed to assess the situation, especially those directly regarding tourism, in order to frame the future challenges and emerging opportunities for the European tourism sector.
3. **Review of European/global trends in tourism** – the review looked at recent trends in the other key destinations around the world, particularly the key markets for European tourism, which also represent some of its main or emerging competitors.
4. **Interviews with key individuals/organisations** - mainly at a European level, but also including global and national tourism organisations where pertinent. These were in-depth semi-structured interviews, starting with a list of ‘topics’ or ‘themes’ to structure the conversation without limiting the interviewees responses.
5. **Survey of national/European tourism organisations** - The survey consisted of an online survey where respondents were asked their response to statements as well as being invited to

offer more open responses. The survey was circulated to a wide range of organisations including European tourism organisations, national tourist bodies, industry tourism bodies, consumer tourism bodies, environmental and social NGOs/civil society organisations and groups, and destination management organisations from all 28 Member States.

6. **Case studies** – these were chosen to demonstrate an aspect of good practice and, as much as practicable, were chosen to represent the diversity of and challenges facing European tourism.

The structure of this report follows this methodology, with the conclusions and recommendation presented in the final section.

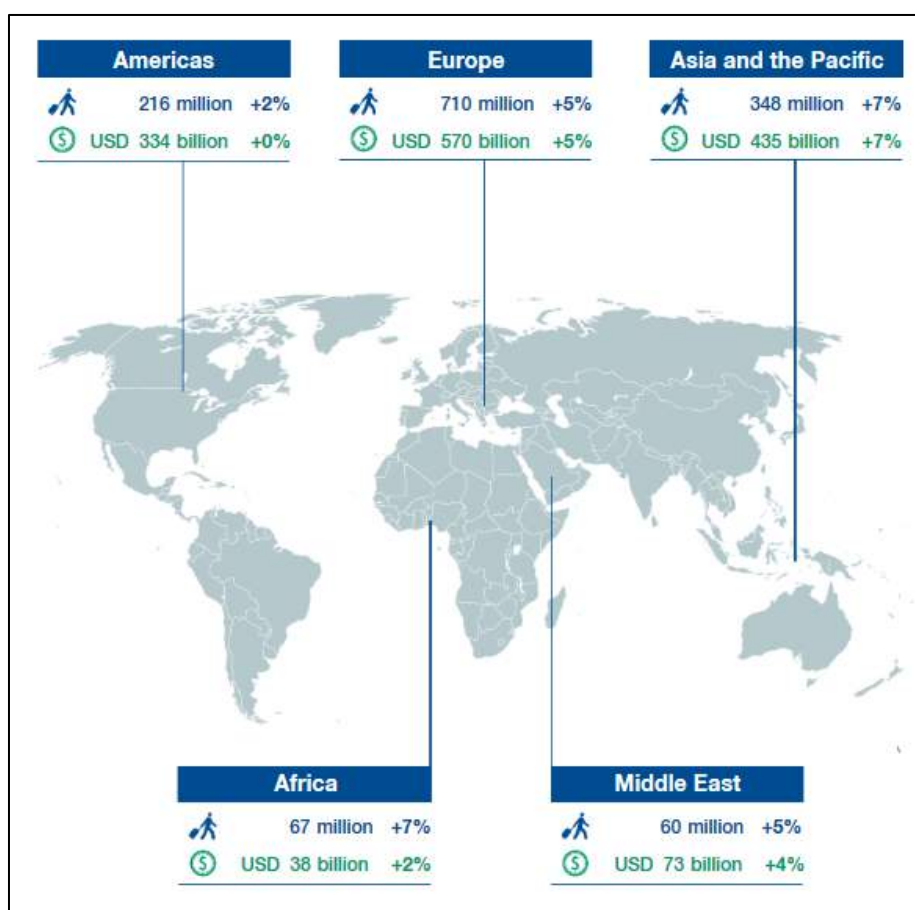
2. OVERVIEW OF TOURISM IN THE EUROPEAN UNION

2.1. Europe's place in global tourism

Global tourism continued to grow during 2018, making it the ninth consecutive year of growth for the industry. International arrivals reached 1.4 billion for the first time, an increase of just over 5% (UNWTO, 2019b), which is slower than 2016-17 which was around 8% (UNWTO, 2018a). Early indications are that 2019 will also see continued growth, but at a slower rate than the previous year, estimated at 3.5% for the first six-months (ETC, 2019).

Tourist receipts also increased during 2018, up over 4% on 2017, to 1.7 trillion USD. Growth in tourism receipts continue to out-perform global GDP, as they have done every year for the last decade with the exception of 2009 and 2016. Tourism now accounts for 7% of global exports and 29% of services exports; making it the world's third largest export industry² (UNWTO, 2019a).

Figure 1: World international arrivals and tourism receipts.



Source: UNWTO (2019a)

Asia and the Pacific was the strongest growing region for 2018, achieving 7% growth for both arrivals and receipts³; Europe saw the second strongest growth. The main purpose of travel was leisure, recreation and holidays, accounting for 56% of all international arrivals, growing from 50% in 2000. Visiting friends and relatives, health, religion and other (27%) and business and professional (13%) made up the remainder⁴. Over half of trips were made by air (58%), an increase of 12% since 2000,

² Based on 2017 data, 2018 data not available until late 2019.

³ Africa also saw a 7% growth in visitor numbers, but a much more modest increase in receipts

⁴ Purpose was not specified for 4% of trips.

predominantly at the expense of land transport which fell 10% over the same period to 37% (UNWTO, 2019a). Raising concerns over sustainability, both in terms of capacity and environmental impact.

The world's top ten global destinations account for 40% of international arrivals and 50% of tourism receipts. Spending per arrival varies across destinations, which means that the United States of America are the top earners from international tourism (214 USD billion), followed by Spain (74 USD billion) and France (67 USD billion). The duration of stay and motivation for trip (holiday, visiting friends and relatives, etc.) are likely to be largely responsible for differences in spending per arrival. However, eight of the top ten destinations also appear in the list of top ten earners.

Table 2: World's top ten destinations (2018)

Country	International arrivals (million)	% change (2017-18)
France	89	3
Spain	83	1
United States of America	80	4
China	63	4
Italy	62	7
Turkey	46	22
Mexico	41	5
Germany	39	4
Thailand	38	8
United Kingdom	36	-4

Source: UNWTO (2019a)

As well as being the world's largest destination, Europe is also the largest generator of outbound tourism trips, 48% in 2018. It is worth noting that around 80% of tourist arrivals are generated from within the same region, so around 530 million trips are Europeans visiting other European destinations (UNWTO, 2019a). Many of the world's fastest growing developing economies⁵ are in other regions and whilst these will continue to generate international travel to Europe, they will also begin to benefit from 'internal' as well as external international arrivals, as their tourism industries continue to develop.

However, when it comes to spending, China is number one, spending 277 USD billion in 2018. Almost twice that of the second placed country, United States of America, 144 USD billion and three times the third placed, Germany, 94 USD billion. This trend is likely to continue, as the number of Chinese passport holders is expected to double by 2027 (UNWTO, 2019a).

2.2. European tourism in numbers

Europe also saw its ninth-year of growth in 2018, with 710 million international tourism arrivals, an increase over the previous year of 5%. The last two decades have seen the volume and value of tourism double, although outbound tourism from Europe has increased over two-and-a-half times, which suggests that Europeans are increasingly travelling to long-haul destinations. Europe remains the largest tourism destination for international arrivals, with 51% of arrivals and 39% of tourism receipts. However, growth has not been consistent across the continent; Southern / Mediterranean Europe saw

⁵ Often identified as the BRIC (Brazil, Russia, India and China) and MINT (Mexico, Indonesia, Nigeria and Turkey) countries. The BRIC countries are also referred to as the BRICS to include South Africa.

the strongest growth, with increases of 8% in arrivals and 7% in receipts, followed by Central / Eastern Europe, plus 5% and 9% respectively. Western Europe reported below average figures with growth of 4% in arrivals and 3% in receipts. Only a marginal 1% growth was seen in Northern Europe for both arrivals and receipts.

Table 3: The volume and value of tourism in Europe's regions (2018)

UNWTO European regions	International arrivals (million)	Receipts (Euro billion)
Southern / Mediterranean Europe	289.4	187
Central / Eastern Europe	141.4	58
Western Europe	200.4	159
Northern Europe	78.9	79
Total for Europe	710.1	483
Of which EU28	562.9	407

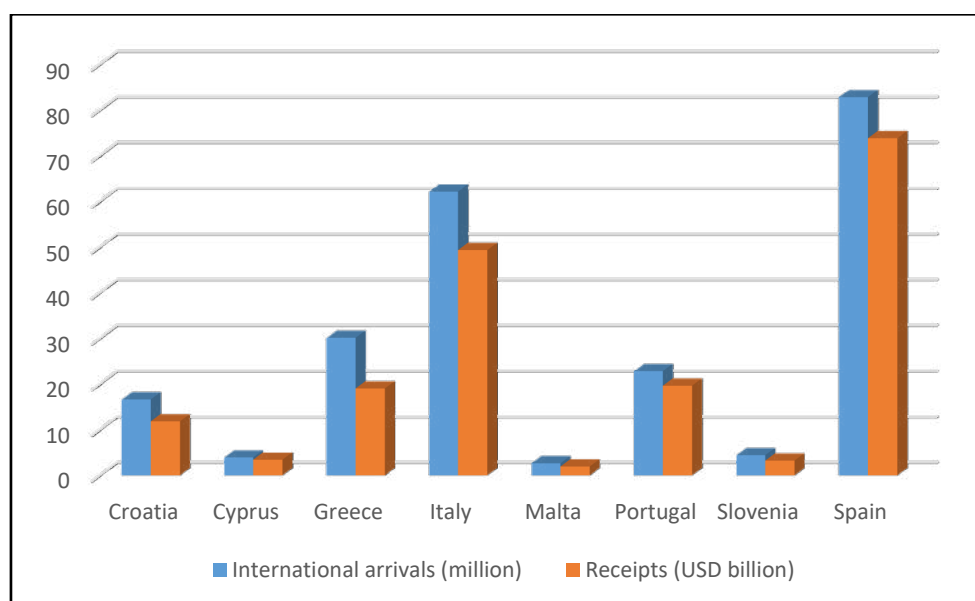
Source: UNWTO (2019a)

The performance of EU Member States within these regions varies, as is shown in the following sections.

2.2.1. Southern/Mediterranean region

Within the Southern/Mediterranean region, Spain, saw the lowest growth rate at 1.1%, although this still added nearly a million extra visitors in 2018. At the other end of the scale, Slovenia grew by 23.4%, however, this only added a similar number of visitors. Most Member States in the region saw increases of between 7 and 14%.

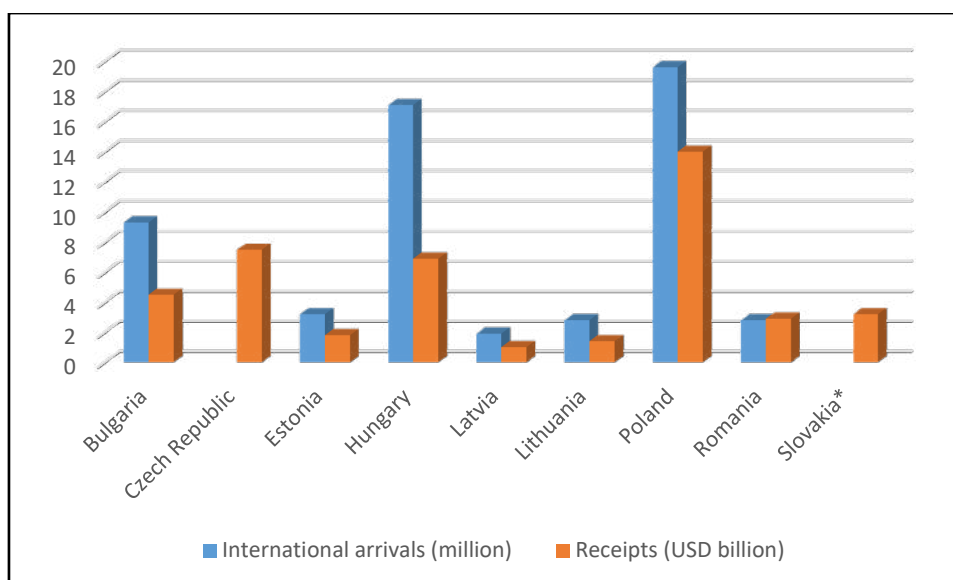
Figure 2: Headline figures for Southern/Mediterranean Europe, 2018.



Source: UNWTO (2019a)

2.2.2. Central/Eastern Europe

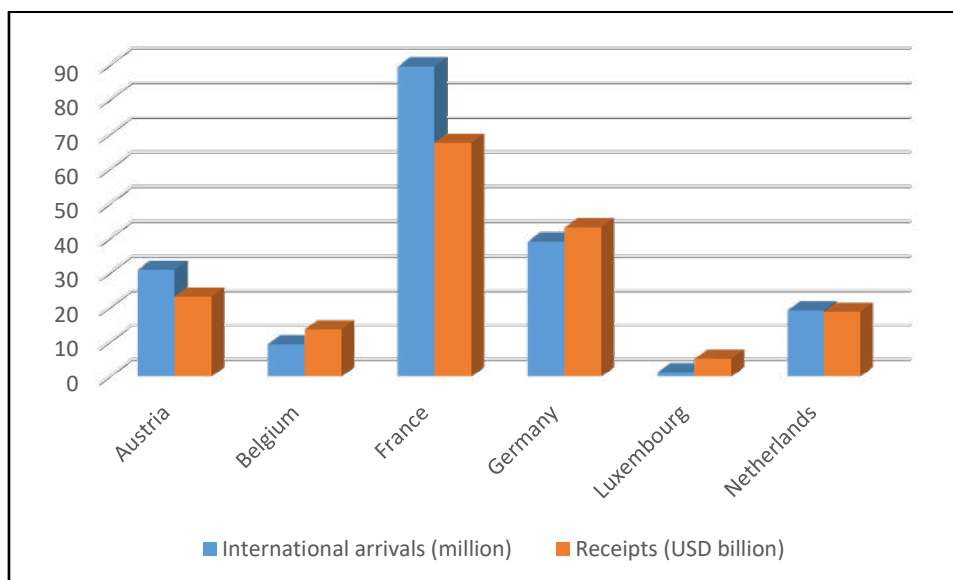
In Central/Eastern Europe, two of the Baltic States saw virtually static numbers, Estonia -0.3% and Latvia -0.2%, whilst the third, Lithuania, saw the highest growth in the region 11.9%, although this only added a few hundred-thousand to the previous year's arrivals.

Figure 3: Headline figures for Central/Eastern Europe, 2018.

Source: UNWTO (2019a)

2.2.3. Western Europe

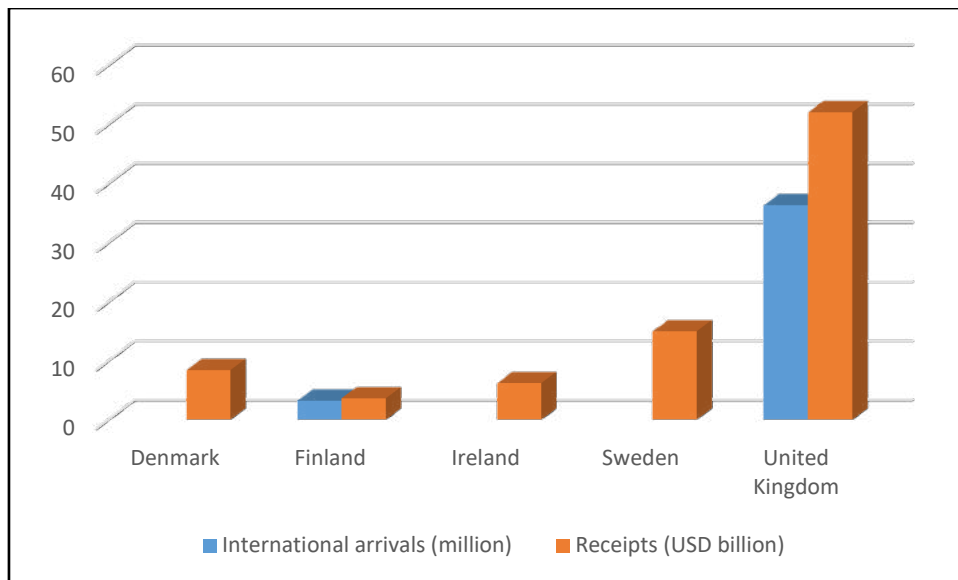
In Western Europe, Belgium made a good recovery in 2018, up 9.5% after a fall the previous year. Apart from Luxembourg, which saw a 2.7% fall, the remaining countries saw modest increases of between 3 and 6%.

Figure 4: Headline figures for Western Europe, 2018.

Source: UNWTO (2019a)

2.2.4. Northern Europe

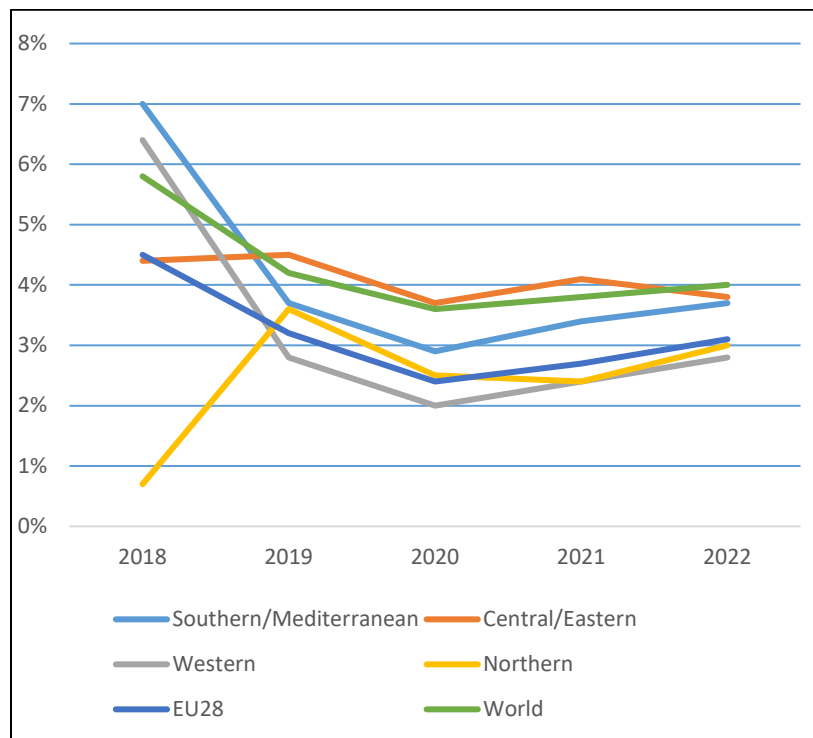
The worst performer overall was Northern Europe, with growth of just 0.5%. This is based on just two countries as no international arrival data has been reported so far, based on the modest increases in receipts reported, this seems to be a reasonable estimate.

Figure 5: Headline figures for Northern Europe, 2018.

Source: UNWTO (2019a)

2.2.5. Prospects for 2019 and beyond

As already mentioned, whilst tourism arrivals are expected to continue to grow in 2019, it will be slower than in previous years. With most currently averaging around the predicted growth rate of 3.6% for the year. Figure 6 below show the forecast growth for the European regions 2019 – 2022⁶, it shows that growth is expected to slow to between 2 and 4% over the next four years.

Figure 6: Estimated growth in European international tourism arrivals.

Source: ETC (2019)

⁶ 2018 is estimated, based on reported data

3. EUROPEAN UNION POLICY AND ACTIONS

3.1. EU tourism policy

Tourism plays a major role in the European economy, not only in terms of economic growth, through visitor spending, but also by contributing to regional development and employment. Tourism has impacts and interdependencies in many areas of government, including transport, environment, consumer protection and regional development. Policies in these areas have not always been coordinated when considering the potential impacts on tourism. However, the economic benefits of tourism, have become more visible through the introduction of Tourism Satellite Accounts (TSA)⁷.

3.1.1. The Treaty of Lisbon

Since implementation of The Treaty of Lisbon in 2009, modifying the Treaty on the Functioning of the European Union (TFEU) the EU has been able to support, coordinate or supplement the actions of the Member States in the tourism domain (Margaras, 2017). This effectively launched a new phase in EU tourism policy, as it formally recognised European tourism policy (art. 6 TFEU on principles and art. 195 TFEU on tourism policy) for the first time with its own legal basis (Estol and Font, 2016). “However, tourism still does not have a separate budget either under the ongoing multiannual financial framework (MFF) for 2014-2020 or in the latest proposal for the 2021-2027 MFF. Neither has this legal recognition of European tourism policy led to a great impetus towards EU-level policy-making in tourism. Although EU legislation has progressively covered areas in which the EU has exclusive or shared competence with the Member States (such as transport, transport security and passenger rights), tourism policy remains essentially nationally regulated by Member States. The EU has been able to implement some special measures towards tourism. The first are in the interests of tourists (travellers and/or holidaymakers). These measures include steps to make border crossing easier and protect both the health and safety and the material interests of tourists. Among them are Council Recommendation 86/666/EEC on fire safety in hotels, Directive 2008/122/EC on timeshare properties, and Directive (EU) 2015/230 on package travel and linked travel arrangements. In addition, regulations have been adopted on passenger rights in all areas of transport.” (Margaras, 2017)

The Lisbon Treaty recognises tourism policy in relation to promoting competitiveness by encouraging the development of activities to promote cooperation between Member States particularly through the sharing of best practice, but with the overall limitation that any harmonisation of the laws and regulations of Member States is excluded (Estol and Font, 2016). Destination management organisations (DMOs)⁸ have an important role to play in coordinating and integrating the development and implementation of EU policies and strategies across national sectors and across the levels of government (Spyriadis, Buhalis & Fyall, 2011).

3.1.2. European Commission tourism communications

The Commission has published several communications, the most recent one in 2014, setting out its policy guidelines for the development of the tourism sector. These are:

⁷ Tourism Satellite accounts are the main statistical tool for measuring the economic value of tourism. They encompass both direct tourist expenditure as well as tourism supply contributions (employment, business expenditure, etc.).

⁸ Destination Management Organisations (DMOs) play a key role in developing tourism locally and plan for the overall direction of tourism activities in the area taking into account stakeholder and resident concerns.

- (COM(2007) 0621) of 19 October 2007 — Agenda for a sustainable and competitive European tourism — which set out how sustainable development could ensure the long-term competitiveness of tourism and announced a three-yearly set of preparatory activities;
- (COM(2010) 0352) of 30 June 2010 — Europe, the world's No 1 tourist destination— a new political framework for tourism in Europe — which analyses the factors which make the European tourism industry competitive and the obstacles to its sustainable development.
- (COM(2012) 0649) of 7 November 2012 — Implementation and development of the common visa policy to spur growth in the EU — which seeks to bring about an increase in the number of tourists from third countries visiting the EU by establishing a common visa policy.
- (COM(2014) 0086), of 20 February 2014 — A European Strategy for More Growth and Jobs in Coastal and Maritime Tourism — which seeks to promote sustainable growth and competitiveness in coastal and maritime tourism (Coito, 2019).

Box 1: Europe, the world's No. 1 tourist destination.

In June 2010 the European Commission adopted the Communication, 'Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe'. This communication set out a new strategy and action plan for EU tourism.

Four priorities for action were identified:

1. To stimulate competitiveness in the European tourism sector
2. To promote the development of sustainable, responsible, and high-quality tourism
3. To consolidate Europe's image as a collection of sustainable, high-quality destinations
4. To maximise the potential of EU financial policies for developing tourism.

A regularly updated [implementation rolling plan](#) has been developed that outlines the major initiatives to be implemented as part of the strategy, in collaboration with public authorities, tourism associations and other public/private tourism stakeholders.

To date, the Commission has **successfully implemented the majority of the actions set out in the Communication**, focusing on the **following priorities**:

- increasing tourism demand, from within the EU and beyond
- improving the range of tourism products and services on offer
- enhancing tourism quality, sustainability, accessibility, skills, and ICT use
- enhancing the socio-economic knowledge base of the sector
- promoting Europe as a unique destination
- mainstreaming tourism in other EU policies.

European Commission, 2019

3.2. European Union actions and initiatives in tourism

This section summarises the actions and initiatives undertaken by the European Union (EU) over the last 5-10 years in the field of tourism. These have been wide ranging and vary in size, duration and levels of support available.

The different funding schemes have been reviewed and general information related to the funded projects and initiatives has also been examined. The data presented has been collated from the websites of the programmes, as well as specialised publications such as the 'Guide on EU funding for the tourism sector' (https://ec.europa.eu/growth/content/guide-eu-funding-tourism-sector-updated-version-0_en).

There are other programmes that include tourism projects. For the purposes of this study only those that have a significant tourism element to their programmes have been included. The following table summarises the information of the programmes, highlighting the tourism-related funding areas, as well as the budget information. An extended summary of the programmes can be found in Annex I.

Table 4: EU actions and initiatives in tourism

EU Programme	Tourism-related funding areas	Budget
European Fund for Strategic Investments (EFSI)	• Travel infrastructures • Energy efficiency of hotels and tourism resorts • Revitalisation of brown fields for recreational purposes • Tourism SME financing agreements • Setting up "investment platforms" (IPs) dedicated to tourism	EUR 315 billion
European Regional Development Fund (ERDF), ESIF	• Research and innovation • Information and Communication Technologies • Competitiveness of Small and Medium-Sized Enterprises • Shift to a low-carbon economy • Environmental protection and resource efficiency • Employment and support for labour mobility • Education, skills and lifelong learning	EUR 200 billion for the period 2014-2020
European Social Fund (ESF), ESIF	• Training workers • Supporting mutual learning, establishing networks • Disseminating and promoting good practices and methodologies in the domain of social innovation	EUR +83 billion for the period 2014-2020
Cohesion Fund (CF), ESIF	• Trans-European transport networks • Projects related to energy or transport: energy efficiency, renewable energy, developing rail transport, supporting intermodality, strengthening public transport, etc.	EUR 63.4 billion

European Agricultural Fund for Rural Development (EAFRD), ESIF	• Diversification of farmers into non-agricultural activities: how to develop rural tourism • Business start-up aid: rural accommodation, shops, restaurants, guided tours, etc., engaged in sustainable and responsible tourism • Investments for public use in recreational infrastructure, tourist information and small-scale tourism infrastructure • Studies and investments associated with the maintenance, restoration and upgrading of the cultural and natural heritage of villages, rural landscapes and high nature value sites • Co-operation: creation of clusters and networks, co-operation among small operators in organising joint work processes and sharing facilities and resources and for the development and/or marketing of tourism services relating to rural tourism	EUR 96 billion for the period 2014-2020
European Maritime and Fisheries Fund (EMFF), ESIF	• The diversification of activities within fisheries, including eco-tourism, pesca tourism⁹ and fishing tourism, local gastronomy (fish and seafood restaurants), accommodation, tourist trails, diving, etc. • Professional training, life-long learning and the acquisition of new professional skills enabling professionals of the fisheries sector or their life partners to enter into tourism activities or to carry out complementary activities in the field of tourism	EUR 6.4 billion for the period 2014-2020
COSME	• Facilitating access to finance • Supporting internationalisation and access to markets • Creating an environment favourable to competitiveness • Encouraging an entrepreneurial culture	EUR 2.3 billion for the period 2014 - 2020
LIFE	• Environment • Climate action	EUR 3.4 billion for the period 2014 - 2020

⁹ Pesca-tourism is the practice of professional fisher-men/women welcoming tourists onto their vessels as a semi-tourism/recreation activity, where they can discover first-hand their work.

Horizon 2020	• Excellent Science for career development and training of researchers • Industrial Leadership for greater competitiveness of the European cultural and creative sectors by stimulating ICT innovation in SMEs Technologies • Societal Challenges to address in particular the issues of memories, identities, tolerance and cultural heritage • SME instrument for high-potential SMEs to develop ground-breaking innovative products, services or processes able to face global market competition	EUR 79 billion for the period 2014 - 2020
European Destinations of Excellence (EDEN)	• Destination of excellence Award	EUR 750,000
Erasmus +	• Learning opportunities for individuals through Mobility Projects for Higher Education Students and Staff • Cooperation between educational institutions, businesses, local and regional authorities and NGOs, mainly through Joint Masters Degrees; Strategic Partnerships • Not-for-profit European sport events	EUR 14.7 billion for the period 2014 – 2020.
Employment and Social Innovation (EaSI)	• Quality and sustainable employment and social solidarity for policy-making, social innovation and social policy experimentation • Combating social exclusion and poverty • Improving working conditions and job mobility • Setting up or development of small businesses/social enterprises	EUR 919.5 million for the period 2014 – 2020

4. TRENDS AND CHALLENGES IN EUROPEAN TOURISM

4.1. Evolving visitor demand

Some destinations in Europe, like Denmark, are attracting more tourists than ever, while traditional destinations like Spain, France and Italy have consolidated their figures of international arrivals and overnights. Tourism demand is growing in Europe, and every year there are more tourists, in line with the UNWTO predictions. Beyond the numbers, tourists themselves and the way they consume is also changing dramatically. Tourism consumers have become very sophisticated: their motivation and preferences have become more complex, there are significant changes in their behaviour, and there are also generational challenges.

Tourists tend to demand more sustainable tourism products as well as individual and authentic tourism experiences. A tourist experience comprises the thoughts, feelings, and behaviours that take place during tourism activities. Experiences arise from internal stimuli, such as past experiences and expectations, and external stimuli, such as the destination and its attractions (Bastiaansen et al., 2019). As the Organisation for Economic Cooperation and Development (OECD) points out in their 2014 report, contemporary tourists are, in general, more open to self-guided holidays and look at information from other tourists (friends, family or third-parties who post reviews on the internet)(OECD, 2018a). Furthermore, the economic crisis and unemployment and reduced purchasing power has pushed many to pay increasing attention to prices and value for money.

In coming years, Millennials and Generation Z¹⁰ will become responsible for the majority of tourism changes and their travel behaviour may lead to significant shifts in the tourism market (Skinner et al., 2015). They have grown up with quick and direct access to information enabled by the internet and digital technology, which will play a key role in how they access, navigate and interact with different tourism products and services. Indeed, they are highly influenced by social media and recommendations by peers when making travel decisions. They are likely to travel independently, to pick travel experiences that they consider to be ‘authentic’ or ‘not-for-tourists’, preferring to head off the beaten track and ‘live like a local’, and to be more demanding compared to previous generations (OECD, 2018a).

There is a general growing concern that tourism needs to be more environmentally sustainable through the reduction of energy consumption, increasing bio-diversity and reducing the human causes of climate change. Demands for more sustainable tourism have led to the development of alternative forms of tourism, including eco-tourism, which aims to support locally owned resorts that are run in an equitable and environmentally responsible manner. Other alternative forms of tourism include for health, culture, religion, education, conferences, single travellers and Lesbian, Gay, Bisexual, Transgender and Intersex persons (LGBTI) (Margaras, 2017).

There is also a growing concern from the destinations over issues like overtourism, gentrification, and tourismphobia, but in fact all these issues also affect the quality of the tourist experience. In fact, the quality of the visitors’ experience goes hand in hand with the quality of life of local communities. Challenges associated with overtourism may involve “alienated residents, a degraded tourist experience, overloaded infrastructure, damage to nature, or threats to culture and heritage” (Peeters et al., 2018: 21).

¹⁰ Millennials, also known as Generation Y, are the demographic cohort born between the early 1980s and the mid-1990s, typically 1981 to 1996. Generation Z is the cohort following this, born between the mid-1990s and early 2000s. although there less consensus on the dates.

A more recent trend has developed over the last few years, with some individuals reluctant to use air transport unless strictly necessary, due largely to concerns over sustainability. This trend is known as *flying shame* and is becoming particularly popular in northern European countries. In Sweden, the occupancy of night trains has increased considerably within a year; between Malmö and Stockholm by 100%, and between southern Sweden and Lapland between 25 and 60% (Airport Watch, 2019). Although tourism is currently responsible for around just 5% of global GHG emissions, just one sector, aviation, is responsible for the large majority of these, around 40%¹¹.

Transportation is a fundamental driver of the tourism industry: it is a precondition for travel, since it facilitates mobility and the movement of tourists from their place of origin (i.e., their home area) to their destination and back. (Page & Ge, 2009). With international tourist arrivals reaching 1.4 billion in 2018 (UNWTO, 2019b), and responsible for three-quarters of tourism emissions, it has an important role to play not only in the development of tourism, but in addressing issues such as sustainability and overtourism.

Tourism's recent growth has largely been due to the growth in air travel, particularly through low-cost airlines. Although it has recently been reported "that long-distance rail services in Europe are rapidly becoming more popular as passengers eschew flying for environmental reasons" (Railway Gazette, 2019).

Transportation is also important in the movement of tourists within a destination, as "[t]he location, capacity, efficiency and connectivity of transport can therefore play a significant role in how a destination develops, significantly influencing the mobility of visitors and the connectivity of tourist experiences within destinations" (International Transport Forum, 2015, pg5).

For example:

- *Transport policy (e.g. airport/cruise hubs, roads, public transport) can shape access to and travel patterns within destinations, influencing visitor accessibility, mobility and satisfaction;*
- *Transport policy can facilitate a shift to more eco-friendly transport options, enabling destinations to position themselves as sustainable;*
- *Tourism policies can stimulate movement to and within a destination, which can in turn emphasise seasonal peaks and troughs, push transport capacity limits, and place pressure on existing infrastructure capacity;*
- *Conversely, tourism policies can help to secure the economic viability of local transport systems."*

(International Transport Forum, 2015, pg7)

When considering the development of tourism within a destination the inter and intra-connectivity must be considered if it is to be sustainable and the issues surrounding overtourism are to be addressed.

Some specific markets have emerged and are becoming particularly important. This is the case of accessible tourism and health tourism. Health tourism is growing faster than tourism in general. This is largely due to an ageing population and the patients' right to be reimbursed in all EU countries regardless of their nationality. In addition, health tourism is aligned with the idea that prevention measures help reduce health costs for states. According to a research for the EC in 2014 (GFK et al.), if European destinations were accessible to all visitors, this demand could increase by up to 44% a year. However, an EC study on the supply of accessible tourism in 2015 (EC, 2015) estimated that only 9% of tourist services in the EU provided accessible offers, leaving a large gap between supply and demand.

¹¹ <https://sdt.unwto.org/content/faq-climate-change-and-tourism>

In comparison to general tourism as a whole, health tourism is a more domestic phenomenon, as older people are less inclined to engage in long-distance travel. However, many operators may not be inclined to focus on this market, which is often perceived as more difficult and demanding.

To respond to the evolving needs of tourists, new participants have entered the market, facilitated by the emergence of online peer-to-peer (P2P) platforms where individuals can access tourist services directly from other individuals (either free or for a payment). In a similar way, the sharing economy is developing against a background of rapid growth in international tourist arrivals in the world, as well as in the European Union (European Parliament, 2015).

Information and communications technology (ICT) has dramatically changed the tourism sector. The way in which tourists design their holidays, access and buy their products and services has changed radically. In recent years, there has been an increase in the use of mobile devices (e.g. smartphones and tablets) to access information, products and services before and during tourism trips (European Parliament, 2015). Destinations have the possibility to present offers to customers based on location using geolocation technology, creating new opportunities for destination marketing organisations. Many technology solutions will contribute to the improvement of the tourist experience at destinations: Artificial intelligence, Virtual and Augmented Reality, Internet of Things, etc.

Despite the general acceptance of the strong influence of technology in future tourism, and despite the existence of some initiatives such as the Virtual Tourism Observatory, today there is still a lack of data which can help destinations and organisations to understand future tourism patterns, motivations and expectations. The OECD have suggested that a “monitoring system designed to anticipate changes in both the tourism environment and supply and demand trends in world tourism, provide public and private sector stakeholders with better visibility, and give tourism professionals a decision-making tool to improve the management of their activities” should be developed (OECD, 2018a).

Finally, the widespread use of ICT and higher demand for specific tourism niches creates a need for multi-tasking and multi-skilled employees, and better trained professionals able to deliver a positive impact on the tourist’s experience and behaviour.

Tourism flows are generally characterised by a high degree of seasonality, with peaks and troughs in the levels of demand, for example, the peak seasons are during the summer months for ‘beach’ holidays and winter months for skiing, which leads to a highly seasonal demand for labour. The uncertain nature of seasonal work is a powerful disincentive to acquire or invest in a high level of skills. Poorly trained professionals, high seasonality, and low corporate benefits are challenges for the success of future tourism. Thus, the traditional view of the tourism sector affected by seasonality and with a high degree of unskilled labour with poor working conditions challenges the possibilities to develop new forms of successful tourism.

Summary conclusions and possible recommendations:

- Develop strategies for tourists to be more environmentally sustainable and socially respectful when travelling;
- Invest in sustainable transport infrastructure to support the development of sustainable growth in tourism;
- Improve the accessibility of tourism for all, which will also support the development of health tourism;
- Develop a monitoring system designed to anticipate changes in both the tourism environment and supply and demand trends in tourism, and give tourism professionals a decision-making tool to improve the management of their activities;
- Training in new technologies needed.

4.2. Marketing

In recent years, Destination Marketing Organisations (DMOs) have experienced significant changes to the way tourism products are offered and sold. Online Travel Agents (OTA) have profoundly modified the traditional channel structure of tourism product distribution by replacing tour operators, review websites, hotel websites, airline ticket offices, destination marketing websites and websites of some on-site attractions.

Online user-generated rating systems are already affecting tourism businesses and services. Some DMOs have decided to integrate online guest reviews, such as TripAdvisor, with their own traditional classification system to generate ratings by using the reviews to provide a check on the quality of the amenities that are specified in the classification system. It is important to recognise such tools as powerful marketing opportunities. Also, there is an opportunity to integrate destination information into existing networks and collaborations such as with search and booking engines.

Today's travellers are increasingly looking for products and experiences that connect with their values and are consistent with their own lifestyles. They look for unique and location-based experiences, socio-cultural authenticity, singular cultural identities, and therapies unavailable at home, and thus visitor involvement in the creation of value and meaning is nowadays essential to really connect with travellers. The spread of overtourism has the potential to cause the loss of authenticity and imply a significant risk to the future attractiveness of a destination. An economic impact is the degradation of the destination image as perceived by tourists, i.e. tourists feeling concerned by tourism overcrowding and congestion. Furthermore, uncontrolled tourism development can cause significant damage to landscapes, seascapes, air and water quality, as well as the living conditions of residents, causing economic inequalities and social exclusion, amongst other issues (Peeters et al., 2018).

New technologies, such as virtual reality, can also be considered as a marketing and promotional tool for tourism businesses and DMOs. It is a new way for customers to engage with destinations, providing a level of immersion and engagement unmatched by other media platforms, through a more compelling mode of storytelling. This technology can bring a destination to life, so travellers are able to get a feel of the destination in advance, to preview the experiences on offer, and to assist with managing expectations. It can also be used to promote tourism development in less-visited areas, helping to re-organise visitors by managing massification¹² and over-tourism. The possibility to present offers to consumers based on location (i.e. location-based services, LBS) also creates new marketing opportunities for DMOs (OECD, 2014).

However, the shift towards a new paradigm for DMOs is the imperative to widen their scope to become all embracing Destination Management and Marketing Organisations (DMMOs) in order to manage the contemporary changes in tourism destinations. A more holistic approach that expands beyond destination marketing and embraces all stakeholders operating in the destination under a common goal is needed. There is a general call to stop launching destination marketing campaigns aimed at attracting more tourists, although this is not shared among all stakeholders, which illustrates further the need for the existing DMO model to evolve.

Branding is becoming more important and is seen as the process of not only forging an identity that is authentic, understood by all your stakeholders, and sets you apart from the competition, but also includes managing the image and reputation of your place. Stakeholders must include not only public and private institutions, but also local residents. Placemaking is an important, and often forgotten, part

¹² Massification is where products normally associated with the luxury market are made available to a mass market. In the case of tourism, this can lead to significantly increased demand at a destination with subsequent negative impacts.

of branding. For instance, in order to address the negative effects of motor transportation in cities, the construction of bicycle paths and the expansion of pedestrian zones could be considered. Branding is not only crucial to promote a tourism destination and the place's culture abroad, but also for introducing a destination as an attractive option for foreign investment.

In this sense, it is important to put effort into enhancing the overall European brand, not only to attract more quality tourism, but also to position Europe as an attractive and innovative destination for investment and skilled workers. Europe's brand could also be strengthened by creating pan-European and transnational tourism products and services. Reinforcing European destinations' image, profile and competitiveness would also help distinguish themselves from other international destinations. In many instances, the strongest actors in promoting Europe's brand are cities and not so much member states.

The key aim of any marketing strategy is to create and sustain a good reputation, attracting quality visitors, thus becoming a more attractive and innovative destination, and stimulating economic development. Branding not only consists of forging a strong competitive identity, but also maintaining a consistent reputation over time. However, all around the world, competitor destinations are spending billions of euros in marketing campaigns, slogans and logos to enhance their international perception (Anholt, 2010). Nevertheless, research shows that there is no correlation between changes in places image and expenditure on branding campaigns (ibid.). Tourism campaigns (i.e. marketing) can indeed persuade tourists to choose one destination over another but altering the opinion and behaviour of people towards a place (i.e. branding) is another matter. Branding affects not only tourism, but also the economic development, talent attraction and the public diplomacy capacity of the entire destination.

If Europe's purpose is to develop a strong destination brand, it needs a strong reputation, and a reputation "cannot be constructed; it can only be earned" (Anholt, 2010, p. 6). As Socrates pointed out: "the way to achieve a better reputation is to endeavour to be what you desire to appear" (ibid.). In this context, quality is paramount, but so are values, as strong reputations are built on internationally admired values. For instance, Europe is seen as leading freedom, democracy and human rights in the world. It is therefore critical that Europe continues to promote these values, internally as well as externally. Ideally, all actions, policies and statements must communicate the same values in order to create a consistent brand; a separate budget for tourism which can be used to promote the European brand, its image and reputation, should be part of it.

Tourism is a people-based industry with human capital at its heart, bringing authenticity, values, quality, innovation and competitiveness to tourism businesses and destinations. In general, tourism businesses need support, local residents need reassurance that new arrivals won't adversely affect their quality of life and visitors expect a world-class experience. All national, regional and local governmental institutions need to be aware of all these challenges and work collaboratively with DMOs in order to develop the most efficient managerial strategies.

Recommendations:

- Enhance Europe's overall destination brand by better coordinating all national, regional and local governmental institutions to work collaboratively with DMOs;
- Use new technologies for innovative destination marketing and promotion;
- Training is needed to move from marketing to strategic destination branding.

4.3. Stakeholders

Introduction

The European tourism industry is considered to be extremely important both in terms of generating revenue and providing employment. Nevertheless, the establishment of a special regime for tourism has not been prioritised as for example the case of agriculture in the structuring of the EU areas into directorates and units. The low prioritisation of tourism followed from the general assumption that the tourism was not as important as other industries. As Kearney (1992, p35) notes *“European tourism has long suffered from the benign neglect of governments which have still to recognize its economic and social importance in modern economies increasingly dominated by the services sector”*. However, the economic benefits of tourism have become more visible recently with, among other developments, the introduction of TSA (Tourism Satellite Accounts). The use of ‘Satellite Accounts’ allows the measurement of sectors that are not traditionally collated as discrete industries by national accounts.

Tourism is a good example of this. As already noted in Section 1.2 tourism encompasses activities from 12 other sectors or industries, such as transportation, accommodation, food and beverage services, etc. The use of TSAs allows these to be measured collectively, using a consistent methodology, which allows comparisons with other industries and between countries. More recently pressure from stakeholders has encouraged the EU to give greater priority to tourism, in particular towards active and effective policy making. The use of TSAs will make this more visible.

Currently, the EU does not have specific budget allocation for tourism, using resources from various programmes in order to implement policy. This situation creates a degree of uncertainty with regard to the availability of funding for ongoing and future actions and thus weakens mid and long-term planning. A specific budget for tourism development allocated as part of a multiannual financial framework would enable the EU to plan its tourism funding programmes effectively and give stakeholders the confidence for longer-term participation. For example, the creation of training programs would be more sustainable with sustained multiannual investment (see sections 4.1, 4.2 and 4.4), creating a positive impact on the industry.

The European Parliament created a Tourism Task Force in June 2012. The TRAN Committee members held a High-Level Conference on Tourism in the European Parliament on September 2017 to promote the EU Tourism Policy. The discussions focused on a “European strategy to enhance the competitiveness of the Tourism industry, a key driver for job creation” (European Parliament, 2019, pp 99). In addition, the Members also kept working on the idea of a “separate budget line for Tourism within the EU budget. Such separate budget line has been requested for next Multiannual Financial Framework (2021-2027) with the support of most political groups” (European Parliament, 2019, pp 99).

EU Tourism Stakeholders

A sustainable approach to strategic destination planning emphasises the need for the participation of diverse stakeholders in order to pursue sustainable tourism development in ecological, economic, sociocultural and political realms (Spyriadis et al., 2011). “Persons, groups, neighborhoods, organizations, institutions, societies, and even the natural environment are generally thought to qualify as actual or potential stakeholders” (Mitchell et al., 1997).

The EU’s most important stakeholders are the Member States as there would be no EU without them, although the EU regions have an important role to play. Large international organisations, trade unions and the private industry also have a significant influence. Trade unions might represent an entire sector; or industry bodies like HOTREC (umbrella Association of Hotels, Restaurants, Bars and Cafes and similar establishments in Europe) in the accommodation sector; equally international organisations can

have a level of global influence. However, as 90% of the tourism companies are micro-businesses or SME's, these must also be considered, particularly as they are less likely to be represented by supranational bodies and therefore are potentially unheard. Given that within the European Commission tourism is positioned within DG Internal Market, Industry, Entrepreneurship and SMEs, is a clear indication that enterprises are seen as important stakeholders.

The local inhabitants of a destination are an important stakeholder, which until recently have had only a minor and indirect role in tourism policy making. Dür & Mateo (2012) suggest that citizens' groups are more likely to 'lobby' the EU through (social) media, whereas business associations tend to lobby in a more traditional sense, directly targeting political parties and governments. Moreover, well-resourced organisations and groups find it easier to promote their interests than groups which have more limited resources. As a result, business groups have better access to the European Commission and Member States' governments than both citizens' groups and many professional associations.

The final stakeholder identified by Mitchell et al. (1997) is the natural environment, whose protection can be both helped and/or hampered by tourism. It is therefore important that organisations working in the field of environmental protection and awareness are included in discussions regarding the development of policy and practice in tourism.

EU Tourism Governance

The effective governance of tourism stakeholders requires adequate institutional and organisational arrangements. Destination management organisations (DMOs) have an important role to play as vehicles of meta-governance. The role of the DMOs is central in coordinating and integrating the development and implementation of policies and strategies at intersectoral (across sectors) and intergovernmental (across the levels of government) levels (Spyriadis et al., 2011). The Tourism Unit of the European Commission is thus the 'DMO for the European Union' as almost all European initiatives and proposals derive from this Unit, and furthermore, its role is also to ensure that policies are implemented. The Tourism Unit is also responsible for the promotion of Europe as an overarching destination, although this task has been outsourced and is currently undertaken by the European Travel Commission (ETC).

Interest groups possess highly specialised information and because they have well-established beliefs concerning how policies translate into consequences, they have very specific policy preferences. The Commission by contrast has preferences for consequences, but no clear preference on policies since it lacks sound knowledge about the relationship between policies and consequences (Bowen, 2009). Thus, both the EU and the stakeholders' organisations depend and make use of each other as they both possess valuable competences. Members of the European Parliament and Council of the European Union also tend to value stakeholder opinion, often preferring policies which their electorates support (see also section 4.5 regarding the lack of specific EU budget for tourism).

Dür & Mateo (2012) distinguish between Euro-associations and national associations when considering the representativeness of stakeholder's organisations – the first being established at a European level with the purpose of influencing EU institutions. Only relying on these, however, is likely to be a risky strategy, as these federations are often slow in taking decisions and they may not have the resources necessary for effective lobbying (Mazey & Richardson, 2006).

The EU gained new competences in tourism after The Treaty of Lisbon. However, due to the limited expertise in the industry at the time, it has relied on external stakeholders for knowledge, practical suggestions and support. With this support from the tourism industry and its larger organisations, it has been more difficult for national governments to overlook guidelines and policies. This is an instance of 'New Governance' which is much used by stakeholders' networks and lobbying organisations as they

have greater influence over the policy making process than in the traditional top-down model. Furthermore, EU tourism stakeholders have continued to emphasise the importance of this for the future of European tourism, moving it higher up the political agenda to reflect its economic, social and environmental importance (Black & Gregersen, 2013).

One of the current EU goals is to remain the 'World's number 1 tourism destination', therefore tourism must be prioritised at an EU level rather than a solely national level. Tourism stakeholders can use the strategy of 'big words' (tying a policy area to the larger goals and values of the EU's purpose) and link tourism to 'internal market' values (e.g. free movement of people), which is one of the pillars of the EU. This is especially relevant as many tourists from outside Europe travel to different countries and in general view Europe as one destination: "*the basic premise ... is that in the eyes of overseas visitors Europe is perceived as a single destination*" (Anastasiadou 2006, p26). Also, as tourism is recognised by European politicians as highly important both in terms of employment and revenue, it makes it difficult not to conceive tourism as an important and appropriate area for EU policies and actions.

EU tourism stakeholders must also use a strategy of 'small steps' to gain the deserved significance. Gaining significance through 'small steps' focuses on the technical aspects of an issue, and it seeks to gradually build up support for certain policy areas. This can among others be by organising conferences, conducting studies on the benefits of the industry, particularly reflecting the impact of EU wide standards or regulations, organising informal meetings between stakeholders, etc.

Conclusion

Mitchell et al. (2007, 871) suggest that "*The stakeholders winning management's attention will be only those the managers perceive to be highly salient*". Thus, policy-makers are more likely to take into account those actors which have all three attributes (power, urgency and legitimacy) and which hold credible specialised information on the topic, have citizen support, and are backed by powerful economic actors. However, the traditional stakeholder theory states that all types of stakeholders are important and should be considered each in their own way.

EU tourism stakeholders can improve their position by continuing to cooperate across country borders, creating a stronger lobby and knowledge base. This would also help unify the tourism industry, as it will increase European tourism knowledge and awareness throughout EU. As Edgell et al. (2008) state, cooperation, partnerships and strategic alliances all help the tourism industry to become more organised and united, and once this is visible at government level it is easier to influence decision makers.

Host communities should be more involved in tourism governance than they currently are. EU tourism stakeholders who frame tourism primarily from the community's point of view are still scarce. The advent of overtourism and the social problems that it entails is starting to change this perception and for the first time the recognition of the importance of host communities as significant tourism stakeholders is widespread. Tourism issues are still mainly or solely discussed from a business perspective, leaving little room for concerns related to other stakeholders, such as host communities and the environment. The EU should encourage the participation of host communities and citizens in decision making as they are important to the goal of sustaining Europe as a top-quality destination.

Finally, tourists or visitors as stakeholder groups are poorly organised or not organised at all, and therefore their concerns are only heard or taken into consideration indirectly, through the perceptions that businesses and DMOs have of their needs and behaviour. There is room for a much more explicit acknowledgement of the importance of this stakeholder group to achieve a fully inclusive system of governance.

Summary conclusions and recommendations

- Tourism should have a greater prominence and more autonomous structure within the European Commission;
- Stakeholder mapping could be adopted as a tool for the effective management of stakeholder networks by the Tourism Unit (DG GROW);
- Stakeholders representing tourism destinations' host communities and the environment should also be given a prominent role in policy making processes;
- Tourists as stakeholders should be given a more explicit recognition and their needs and concerns also given the adequate status;
- Small firms should continue been given special attention as active stakeholders, but their participation should be made more straightforward and effective.

4.4. New technologies

Information and communications technologies (ICTs) are central to develop a more intelligent and competitive European tourist industry and destinations. A new range of new and emerging technologies and innovations, such as artificial intelligence, blockchain technology, big data analytics, robotics, and the internet of things, are promising to unlock many opportunities for people around the world. Through their implementation and legislation, European institutions have the capacity to change lives in every corner of the Union. A special emphasis needs to be given to urban areas because, according to Eurostat and the OECD, 72% of the EU28's population live in urban areas (Eurostat, 2016). By 2025, the economic impact of city Internet of Things applications is forecast to be €1.42 trillion (ECM, 2017).

Technologies are able to advance the accessibility of tourism for people with disabilities. For instance, artificial intelligence may be able to improve the delivery of tourist information, such as matching the specific requirements of visitors with disabilities to the provision of accessible services while on the move and whilst at destinations. This could be implemented from the information and booking stage through to the delivery of accessible tourism experiences, from choosing a tourism activity or destination until travelling around the venue. Indeed, the industry is already developing virtual assistants (i.e. chatbots) powered by artificial intelligence as well as big data to help travellers book trips more easily, make services more efficient and targeted, as well as predict service demand.

For the tourism industry, big data can be useful to monitor and track visitor flows, to identify crowded areas, to evaluate industry performance and its volatility, and to refine tourism strategies or to create smart specialisation strategies (Peeters et al., 2018). Moreover, the usability of information can also include data-driven decision making as well as monitoring policies and measuring success. Nevertheless, this data needs to satisfy the basic condition of being 'fit for use', i.e. data that meets quality criteria such as relevance, accuracy, reliability, timeliness, accessibility, coherence and impartiality. Thus, there is a need to foster cooperation with big data providers/intermediaries for business intelligence and tourism product development in order to obtain better data transparency. In general, tourism businesses are obliged to provide data transparency, whereas big data owners are not. Consequently, despite some interesting initiatives (see <https://ec.europa.eu/digital-single-market/en/big-data>), European institutions should not overlook that with the increased use of big data come concerns over privacy, inaccuracy and misuse of information, which must be properly regulated following ethical principles based on human rights and democracy.

Mobility is another key area where new technologies have the potential to create, both positive and negative, disruption in the tourism sector. From smart mobility, autonomous vehicles to sustainable connectivity and multimodality, both for short and long-distance freight and passenger transport. In this regard, the expansion of digitalisation, automation and energy management are sectors that will be directly interconnected with mobility.

Because new technologies will automate human tasks through machine learning, robotics and artificial intelligence, this is likely to disrupt the labour market, changing how people work, what they do, and more generally how many jobs are available not only in the tourism industry, but also around the world and in many industries. Policy makers need to consider how to manage these rapid, and sometimes unpredictable, changes. However, these changes might also allow the delivery of more efficient and affordable goods and services in a range of areas.

These technological changes will impact on the tourism industry, which will lead to a demand for a specialist and qualified workforce if the tourism sector is to remain competitive. This requires considerable investment in human capital development, tourism education and research linked to digitalisation in order to develop digitally-enabled tourism products, services and systems to assist transition of the sector into the digital future. Moreover, investment is also required to support companies in their transition to digital, to improve the tourist experience in destinations. A recognised trend are the digital tools used in museums or cultural heritage sites where augmented, mixed or virtual reality is used to enhance the tourist experience. Another example is the rapidly growing use of mobile technology in delivering instant information to visitors during their stay. Real-time translation software is also making it more convenient for tourists to travel to areas in which they do not speak the language (OECD, 2018a). It is conceivable that virtual tourism could either complement or supplant physical journeys for some travellers. Conversely, with increasingly connected lives, some people are already seeking alternative 'real' natural-based experiences while on trips. How people's behaviours will change in light of these types of paradigm-shifting technologies is yet to emerge (OECD, 2018a).

Blockchain is a relatively new technology, but it has the potential to change the way business operate. A blockchain is a distributed database that is made up of a list of transaction bundles called blocks that are attached to each other (Önder and Treiblmaier, 2018). For instance, blockchain applications in tourism could include better forms of identity management, and more efficient communication for travellers with travel service providers. Moreover, it has the potential for reducing and/or eliminating costs associated with exchange rates between currencies and permitting people to securely register their ownership over data. "Blockchain-based technologies could also provide alternative financing to support the investment activities and development of tourism. Such solutions may help tourism SMEs react to the market failures, financing gaps and scale-related issues that lead to higher transaction costs, as well as easing supply chain management and financing both locally and globally." (OECD, 2018b)

The sharing economy emerged some years ago and is evolving rapidly. Its advocates argue that it has widened the overall supply of travel options by providing easy access to a wider range of services that are often of higher quality and more affordable than those provided by traditional providers. It has also democratised the tourism industry as anyone can easily start their own business. Apart from more flexibility, tourists appreciate these platforms for personalisation, authenticity and contact with local citizens. Critics, on the other hand, claim that the sharing economy provides unfair competition, reduces job security, avoids taxes and poses a threat to safety, health and disability compliance standards (Juul, 2017). Its emergence has disrupted both policies and financial flows around the world as it has tended to concentrate within a small number of companies operating worldwide, which allows those private platforms to become large monopolistic companies. P2P (Peer to Peer) services, notably

in transportation and accommodation, have the capacity to disrupt the lives of local residents, the life of neighbourhoods (i.e. noise pollution) and perhaps even reduce power to assure quality and safety for visitors. It also disrupts the housing market by exponentially increasing prices and forcing housing rents up. The response of these challenges to the sharing economy remains fragmented in the EU, which is counterintuitive considering the EU's current digital single market strategy. Updating the legal terminology, closing the gaps in legislation as well as establishing an appropriate regulatory framework is urgent, especially with regard to their effects on tourist flows (i.e. concentrations in certain locations, overtourism, decline in length-of-stay, congestion management), competition, tax evasion, as well as consumer protection, employment rights and land use.

Summary conclusions and possible recommendations

- Encourage the use of new technologies to predict service demand and better manage massification and overtourism;
- Regulate big data owners for better data transparency;
- Invest in smart mobility to boost sustainable transportation;
- Regulate artificial intelligence and robotics based on principles of human rights and democracy, to protect privacy and misuse of information;
- Invest in training in new technological skills;
- Make investment available to assist companies in their transition to digital (i.e. make sure tourism technology projects are eligible for financial support);

4.5. Tourism environments – towards sustainable and responsible tourism

The meaning of the term 'environment' may vary in tourism debates. Sometimes it only refers to natural environment. Such as in the UNWTO 'three pillar' sustainability concept, which comprises of the environmental (meaning natural), social (and cultural) and economic pillars (UNWTO, 2019c). Other arenas discuss multiple environments. For example, the three pillars concept doesn't specifically include the political environment, such as civil movements or political support and actions. Yet sometimes it becomes relevant and should be included, as it may unlock the implementation of sustainability in the real world of tourism (Mihalic, 2016). Even broader meanings of the term can include, technological, legal and digital environments; many others can become relevant depending on the context.

In academic and political discussions, environmental tourism becomes 'sustainable' tourism, following the Brundtland report on *Our Common Future* (WCED, 1987) and increased political acceptance of a sustainability concept to address environmental challenges (Box 2).

Box 2: Sustainable tourism - a concept

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"

Source: (UNWTO, 2019c)

Concern over tourism environments gained momentum in the early 1970s when George Young (1973) argued that the impacts of tourism are both a blessing and a blight. Indeed, tourism growth brings

positive and negative impacts to the natural, socio-cultural and economic environments of any destination. In the case of overtourism, the tourism presence may increase the negative impacts over the acceptable level, and it may become a negative developmental force; in less developed destinations undertourism fails to activate a critical mass of positive impacts and may become economically unsustainable.

Despite popularity of sustainability in the tourism field, there is much left to be done and sustainability as such, penetrates at too slow a pace into the tourism reality. This gap between the sustainability concept and its actual implementation into a real world became evident in the second decade of this century. The sustainability debate moved focus from the sustainability concept of the three pillars, towards its implementation, to reduce the gap. This has been incorporated through the concept of responsibility, which means 'sustainability in action'.

The word 'responsibility' has been long used in the corporate world (e.g. 'corporate social responsibility' (CSR)). In 2012, the UNWTO applied the wording "For Responsible Tourism" to its Global Code ((UNWTO, 2012); and the EC applied responsible tourism to its *European Charter for Sustainable and Responsible Tourism* (TSG, 2012). This understanding of responsible tourism refers to responsible behaviour and means 'sustainable tourism in action' or 'implementation of sustainable tourism' (Box 3).

Box 3: Responsible tourism - implementation of sustainability

"Responsible tourism refers to the awareness, decisions and actions of all those involved in the planning, delivery and consumption of tourism, so that it is sustainable over time."

Source: (TSG, 2012)

However, the terms are both regularly inconsistently and inaccurately used. This is probably the reason that many documents and papers use both words, sustainable and responsible tourism (TSG, 2012), although within the accepted paradigm, responsible tourism is based on the sustainability concept and refers to 'implementing sustainable tourism'. Following this practice, the combination sustainable and responsible tourism is used here, although semantically the word 'responsible' alone is adequate.

Because the gap between the ideal concept of sustainable tourism and its implementation in the real world, there is the need for more coherent, coordinated and up-to date approach to sustainable and responsible tourism at the individual and national, international and global level. Tourism is a multi-sectorial activity and its impacts go beyond a narrow understanding of "tourism is just an industry" or sector (Hultsman, 1995, pg. 560).

The role of tourism within the EC needs to be more defined and recognised so that the benefits of tourism can be cultivated, and its pitfalls anticipated and avoided. The consequences of continuous growth and new social and global challenges and trends, such as growing tourism demand, looming climate change or demands for more developmental justice, as well as economic tourism competitiveness must be analysed; and if found to be unfavourable, then attitudes, management approaches and policies must change. Freedom to travel and, access to all places and free consumption of the world resources by travellers can no longer be viewed as an absolute right, to be pursued for free, or at all costs. Freedom to travel is a human right for all (UN, 1948; UNWTO, 1999), but a relative right, which needs to be governed and managed, when it prejudices other more important goals. Such as tourism's contribution to climate change in terms of CO₂ emissions, environmental damage, impacts of digitalisation, impacts on local communities, inequality in the distribution of benefits and costs, pollution, etc.

The process towards responsible sustainability, demands cooperation from all stakeholders, consensus and strong leadership, which must be based on the organisational and financial power of a responsible leader. Organisationally, tourism in EU is seen as 'just a sector' and sits within DG Internal Market, Industry, Entrepreneurship and SMEs. The environmental issues of European tourism development are addressed through many projects and activities across the EC. However, there is no single 'tourism budget' or budget lines for tourism at an EU level. Both, the organisational and financial reality of EU tourism governance influences its effectiveness and its visibility in the leadership of global tourism sustainability and responsibility (see section 4.3 for more on EU tourism governance).

In the EU, tourism gained more recognition and policy traction following the *Treaty of Lisbon* (European Union, 2007) a decade ago (see also 3.1.1). However, prior to introduction of Lisbon Treaty, the EC had set up the Tourism Sustainability Group (TSG) in 2004. TSG was established as a result of the EC's orientation towards the sustainability of European tourism. This group of tourism experts comprised of individuals from international bodies, member state governments, regional and local authorities, the tourism industry, professional bodies, environmental organisations, trade unions and research and educational bodies who had expertise and experience in tourism sustainability. The TSG's main task was to create a framework for action for the different stakeholders, provide guidance for destination management, for the use of sustainability indicators and monitoring systems, to regularly evaluate implementation of the measures set out in the framework for action and to provide support for the actors in the field (TSG, 2015).

Box 4: Key challenges from 'Action for more Sustainable European Tourism'

1. Reducing the seasonality of demand
2. Addressing the impact of tourism transport
3. Improving the quality of tourism jobs
4. Maintaining/enhancing community prosperity and quality of life, in the face of change
5. Minimising resource use and production of waste
6. Conserving and giving value to natural and cultural heritage
7. Making holidays available to all
8. Using tourism as a tool in global sustainable development.

Source: (TSG, 2007)

The TSG started its work in early 2005 and formulated its proposals and recommendations in the form of a report issued in February 2007. The report is entitled *Action for More Sustainable European Tourism* (TSG, 2007) and suggests how to make European tourism more sustainable and to maintain this as a continuous process. It defines eight key challenges for the sustainability of European tourism (Box 4).

The report was an important contribution to the definition on the new European tourism policy as outlined in Commission's document *Europe, the World's No 1 Tourist Destination – a new Political Framework for Tourism in Europe* (EC, 2010). It included several of its recommendations and was important milestone in addressing environmental issues in European tourism at the time, when sustainability was not yet so established in national tourism strategies and policies as it is today. In 2006, when the document had been finalised, climate change was not yet been high on the agenda of the Commission. Climate change as a key challenge for sustainability had been suggested by some TSG members, did not make it into a document directly.

Later, climate change became one of the main European actions for sustainable and responsible tourism. In 2010 the TSG produced another milestone document on sustainability and responsibility of European tourism, titled European Charter for Sustainable and Responsible Tourism (TSG, 2012). The Charter defined ten points of action for a more sustainable and responsible tourism including the actions for mitigation and adaptation in response to climate change. The ten points are shown in the Box 5.

The actions clearly reflect the TSG's need and wish to make European tourism more responsible. However, following the mainstream European political view that tourism is 'just a sector', the Commission currently supports joint actions within its organisational framework. In email correspondence between the study team and a European Commission Policy Officer it was stated that "... it has been decided not to pursue a sectoral charter at EU level in light of the efforts to advance more generally the Corporate Social Responsibility (CSR) agenda which also covers tourism aspects amongst others." (EC Policy Officer, 2019). For this reason, active promotion and support of the European charter by the EC is not evident. Moreover, according to the same EC policy officer, the UNWTO Global Code of Ethics for Tourism "has been given a fresh boost also in light of its upgrade into a Convention" (see also section 6.2 in the Convention).

Box 5: The European Charter's points of action for sustainable and responsible tourism.

1. To involve all stakeholders in the planning and management of tourism
2. To respect the rights of all citizens to safe and fulfilling holidays and travel
3. To ensure the competitiveness and viability of the tourism industry
4. To provide a wide range of well supported and satisfying jobs
5. To mitigate and adapt to climate change
6. To control and manage the use of natural, scarce or finite resources
7. To celebrate and conserve natural and cultural heritage and diversity
8. To ensure that tourism respects and benefits local communities
9. To monitor the impacts of tourism and seek continuous improvement
10. To promote awareness and commitment to responsible tourism

Source: (TSG, 2012)

After the Charter had been completed (2012), new developments called for more sustainable production and consumption, a reduction in CO₂ footprints, and a more equitable tourism development. This is supported by the UNWTO and UNEP Report on Integration of Sustainable Consumption and Production Patterns into Tourism Policies (UNWTO & UNEP, 2019). Further pressure is coming from civil initiatives, local, national, European and global, to protect the environment from tourism. There are several examples:

- The closing of Maya beach in Thailand (BBC, 2019), due to environmental damage caused by overtourism.
- A petition advocating the "Ending the Aviation Fuel Tax Exemption in Europe" in order to limit one of the fastest growing sources of greenhouse gas emissions (EC, 2019).
- The Swedish "flying shame" (Coffey, 2019) movement for less CO₂ pollution through travel mobility, which is gaining traction internationally (see also section 4.1 on Evolving visitor demand).

To be sustainable, tourism must be economically viable, meet the needs of society and the natural environment, and in this way, continue to deliver benefits without detriment to current and future generations. Tourism in Europe faces many sustainability challenges. Amongst these, are the problems caused by pressure on resources and local communities, the detrimental effect of seasonality in tourism demand, economic uncertainty, and the manner in which it both influences and is affected by climate change (TSG, 2012). With concerted action these challenges can be met, at all levels. There is a need to address the fourth sustainability environment, political, directing policy and resources to structures that specialise in and understand the tourism industry, moving beyond the 'it is just a sector' perspective. Tourism and its environmental impacts are growing and are no longer small in scale, impacts or importance.

The meaning of the term 'just' also relates to sustainable tourism. It is the adjectival sense of 'just' meaning fair, honourable, upright, or proper (Hultsman, 1995, pg. 560). Just tourism is clearly connected to tourism blessings and blights on the one hand and equity in development on the other. Equity and equality in development are original principles of sustainable development (Inskeep, 1991), based on tourism rights for all. These principles have not penetrated the mainstream three-pillar tourism sustainability approach, to make the world a better place for all, for travellers and non-travellers. In the above context, just tourism may become a concept to reform the inequalities in the benefits and costs to the different stakeholders of contemporary tourism and move towards sustainability for all and responsibility at all levels, including European (Box 6).

Box 6: Just tourism

Just tourism (demand side view)

acknowledges the right to travel and consume the world resources equally for all;
acknowledges unequal participation in travel among the world citizens (countries);
and recognises the responsibility for fair treatment of those who are not traveling and not
consuming the (free) world resources.

Source: Adapted from (Mihalič & Fennell, 2015)

Indeed, much has been achieved in recent years. Among public and private stakeholders there is a growing awareness of the need, as well as growing pressure, for more sustainable, responsible and just tourism behaviour from all stakeholders, for tourism that contributes to quality of life for all and for present and future generations.

Summary conclusion and possible recommendations

- Strengthen the tourism organisational, financial structure and capabilities at EU level, for example, by introducing a specific tourism budget line and a new stakeholder group or body to support tourism sustainability and responsibility (renew Sustainable Tourism Group and its tasks);
- Update the *European Charter on Sustainable and Responsible Tourism* with actions addressing more recent tourism challenges (such as over-tourism and under-tourism, individual carbon footprints, sustainable consumption patterns, just tourism, etc.);
- Promote and implement the *European Charter on Sustainable and Responsible tourism* lines of action;
- Support the transition of the UNWTO Code of Ethics into a Convention and recommend it for adoption by EU Member States;

- Promote and actively support environmentally friendly modes of travel;
- Monitor the airline and other tourism transport's contribution to climate change and react accordingly;
- Support and promote actions on tourism flows and management in space and time to mitigate overcrowding impacts on infrastructure, culture, nature, local inhabitants, visitors and political environment;
- Build critical awareness and support for implementation of economic instruments to reduce the negative impacts of tourism (offsetting, environmental costs, licencing, environmental taxes, etc.).

5. STAKEHOLDER CONSULTATION

The second part of the stakeholder consultation was an online survey. An introductory email was sent to organisations across Europe who have tourism as, at least part, of their remit. The email contained a link to the survey, which contained a mixture of 19 open and closed questions. Over 200 organisations and individuals from across the 28 Member States (plus Norway) were invited to participate¹³. A total of 51 complete responses were received; some too incomplete to be used in the analysis and were removed¹⁴.

The survey was divided into 3 sections: the first asking the respondents' opinions on the trends, challenges and opportunities facing European Tourism; the second on the impact and role of the EU in tourism; and the third about the respondents and organisations. For the full survey see Annex IV.

The responses to the four open questions have been presented in the following ways: the responses to Q1 are examined at the beginning of the next sub-section, whilst the responses to the other three (Q2, Q8 and Q11) have been used, where appropriate, to support the responses to the closed questions.

5.1. Trends, challenges and opportunities

Q1. Please list 5 words that you think best describe the European tourism industry at present?

Figure 12 is a word cloud generated from the responses to this question. The larger and more prominent the word, the more frequent its use. 'Sustainability' is clearly the most frequently used word, followed by 'growing' and 'change', and then 'competitive' and 'overtourism', all of which were mentioned in the interviews and are the subject of much of the current literature.

Figure 7: Words used to describe European tourism



¹³ A full breakdown of the countries and organisations is shown in Annex III.

25 responses were removed because of incomplete responses.

One of the responses to Q2, which asked the respondents to summarise their ‘vision of how to develop European tourism over the next five years’, captures many of these concepts, *“European tourism in the next 5 years should be focused on smart investment strategies that include implementation solutions for additional nature and heritage protection and answer to [the] climate change challenge, intensely develop and promote sustainability while strongly support local communities and regional development in creating more local and authentic experiences.”* Many of the responses to this question raised the issues of not only sustainability and growth, but also around the preservation of culture, heritage and diversity, the importance of valorising the benefits to local communities and consumer protection.

For questions 3, 4 and 6 concerning the trends, challenges and opportunities facing European tourism over the next 5-10 years, the respondents were asked to rank their five top statements from a list of 11, with 1 being the most important and 5 the least. These statements were generated from the literature and interviews with key European tourism stakeholders. To enable these ranks to be used to identify the most supported statements, the scores were reversed (i.e. 1 becomes 5, 2 becomes 4, etc.) and then multiplied by the frequency it was selected. The scores for each of the top five statements are shown in brackets.

Q3. In your opinion, what are the five most important topics in European tourism management (i.e. trends)?

The respondents were presented with 11 statements, plus an ‘Other’ option where they could suggest an alternative. The five highest scoring statements are listed below.

1. The adoption of sustainable growth policies and practices by both private and public sectors. (113)
2. The uneven distribution of visitors causing both under and overtourism in destinations. (107)
3. The growth of unsustainable and irresponsible tourism and the impacts on local residents. (104)
4. The impacts of global warming and climate change, including extreme weather events, threat to natural areas and decreased biodiversity. (100)
5. The needs of new skills and competences in the management of tourism. (66)

The same themes can be seen emerging from this question as question one, with the addition of the need for appropriate skills to meet the demands of the industry, something which was also highlighted in some of the interviews and in a response to Q8, *“The need [for] new skills and competencies [in] tourism. The need for new tourism professionals to learn customer service skills, as well as, new approach in education in tourism.”*

Q4. In your opinion, what topics below should be given preference in European tourism policy making (i.e. challenges)?

As with question 3, the respondents were presented with 11 statements, plus an ‘Other’ option. The five highest scoring statements are listed below.

1. The adoption of sustainable growth policies and practices by both private and public sectors. (150)
2. The growth of unsustainable and irresponsible tourism and the impacts on local residents. (112)
3. The uneven distribution of visitors causing both under and overtourism in destinations. (109)

4. The impacts of global warming and climate change, including extreme weather events, threat to natural areas and decreased biodiversity. (97)
5. The impacts of the Sharing and Circular Economy on tourism development and management. (68)

Again, the themes of sustainability, particularly from an environmental perspective but also the social aspects, and overtourism are highlighted. There is also an expectation that new 'models', such as the 'sharing' and 'circular' economies, will continue to have an impact. In the open questions, some concerns were raised about the lack of regulation of the sharing and circular economies, especially in comparison to the more traditional tourism channels, *"Regulation of some new actors like, OTAs, online booking platforms, and the 'so-called' collaborative economy is needed for achieving the necessary quality in the tourism sector and for consumer protection."*

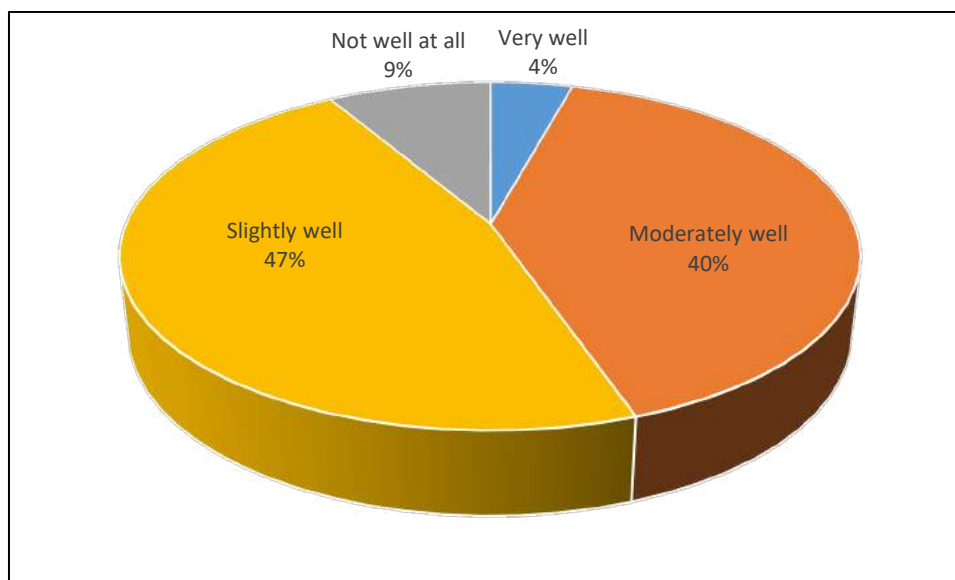
Q5. How well do you think the European tourism industry is prepared for these challenges?

The respondents were presented with five possible responses to this question:

- Extremely well prepared.
- Very well, beginning to adapt.
- Moderately well, some countries need to adapt quickly to these.
- Slightly well, some sectors (e.g. accommodation, transport) will need to adapt further.
- Not well at all.

There was some divergence of opinion on this, although the majority of respondents believing that there would need to be further adaption at country or industry sector levels.

Figure 8: How well do you think the European tourism industry is prepared for these challenges?



Q6. In your opinion, what new opportunities will emerge for the sustainable development of the European tourism sector over the next 5-10 years?

As with question 3 and 4 above, the respondents were presented with 11 statements, plus an 'Other' option. The five highest scoring statements are listed below.

1. Contemporary tourism governance and policy to push sustainable and responsible tourism and effective dialogue between local residents and visitors. (103)
2. Increased specialisation and new markets (i.e. wellness tourism, eco-responsible tourism, community led (bottom up) tourism, staycation/domestic tourism, older/retired market, etc.). (91)
3. The adoption of sustainable growth policies and practices by both private and public sectors. (89)
4. Innovative tourism governance to tackle the uneven distribution of visitors (under and overtourism) in destinations. (87)
5. The growth of new travel mobilities. (78)

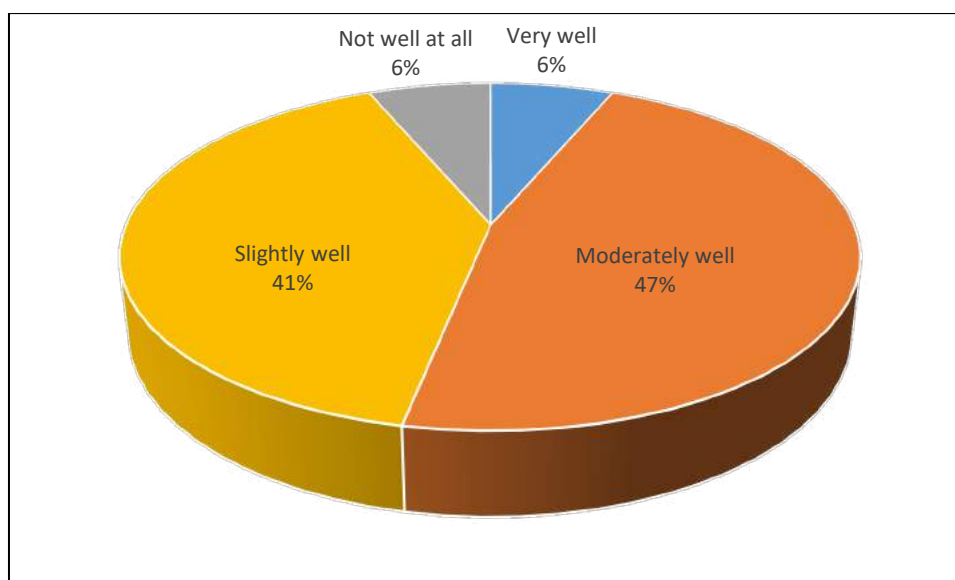
Sustainability is still prominent amongst the responses, both environmental and social, but there is also an expectation that markets, models of delivery and modes of governance will present important opportunities. Again, this is supported by many of the responses to the open questions, one respondent suggests that *"Pursuing a strategy that meets consumer needs, trends and preferences, as well as economic conditions, technology, competition, taking also further attention to sustainability, climate change, and the importance of keeping the cultural identity of the population and local communities."*

Q7. How well do you think the European tourism industry is prepared for these opportunities?

The respondents were presented with the same five possible responses to this question as in question 5:

- Extremely well prepared
- Very well, beginning to adapt
- Moderately well, some countries need to adapt quickly to these
- Slightly well, some sectors (e.g. accommodation, transport) will need to adapt further
- Not well at all

Figure 9: How well do you think the European tourism industry is prepared for these opportunities?



As with question 5, the majority of respondents believing that there would need to be further adaption at country or industry sector levels. One of the respondents to Q8 suggested that the *“Differences in the approach to tourism development and related challenges/opportunities is much more visible on regional/local level rather than a sectoral or country one.”*

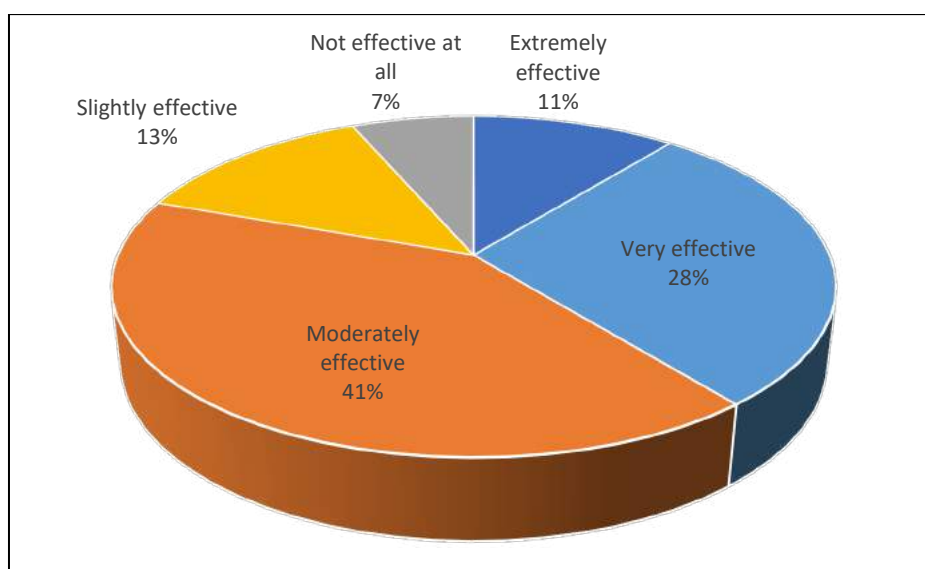
5.2. EU policy and actions in tourism

Q9. How effective do you think EU policies are in achieving the aims of boosting tourism growth, competitiveness and sustainability?

The respondents were presented with five possible responses to this question:

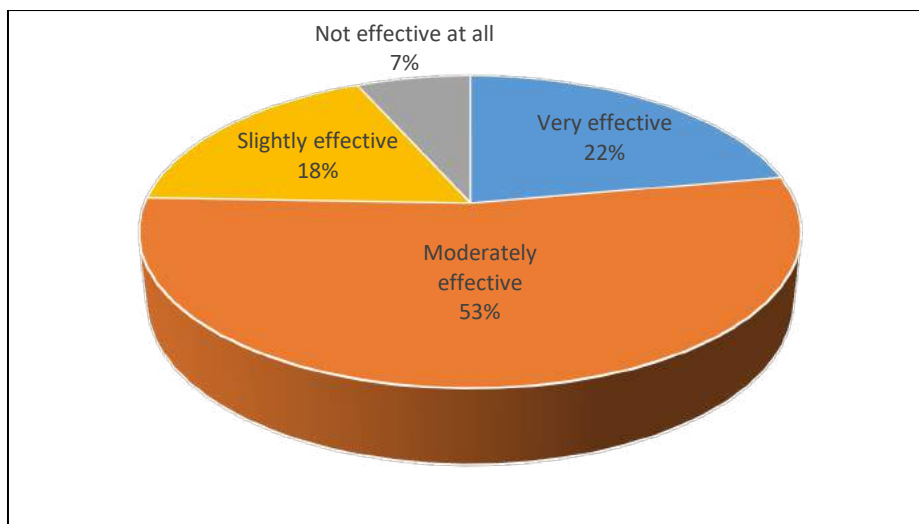
- Extremely effective
- Very effective
- Moderately effective
- Slightly effective
- Not effective at all

Figure 10: How effective do you think EU policies are in achieving the aim of boosting growth?



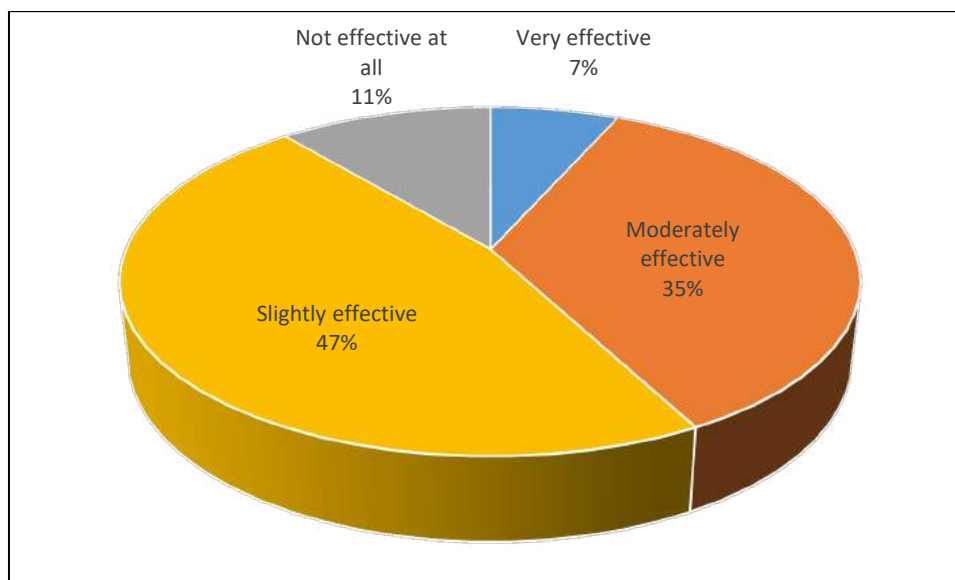
Two-fifths of respondents to this question felt that policies aimed at boosting growth were extremely or very effective, whilst just over half felt they were only moderately or slightly effective, with only a small number considering them ineffective.

Figure 11: How effective do you think EU policies are in achieving the aim of boosting competitiveness?



However, only a fifth felt as positive about the effectiveness in boosting competitiveness, whereas two-thirds felt they were only moderately or slightly effective.

Figure 12: How effective do you think EU policies are in achieving the aim of boosting sustainability?



The perception of the effectiveness for sustainability was less positive still, with just a small number considering the policies very effective (in this case less than those considering them ineffective) and over four-fifths regarded them as moderately or slightly effective.

Looking forward, one respondent to Q11 suggests that a *“good balance between competitiveness, sustainable development and the need to establish guarantees for consumers is the main challenge”*. Whilst another felt that to encourage sustainable development *“a good legal and political framework [which gave a] clear strategic approach”* and direction were needed. However, *“the practical implementation needs [a] stronger commitment from the [tourism] industry”*.

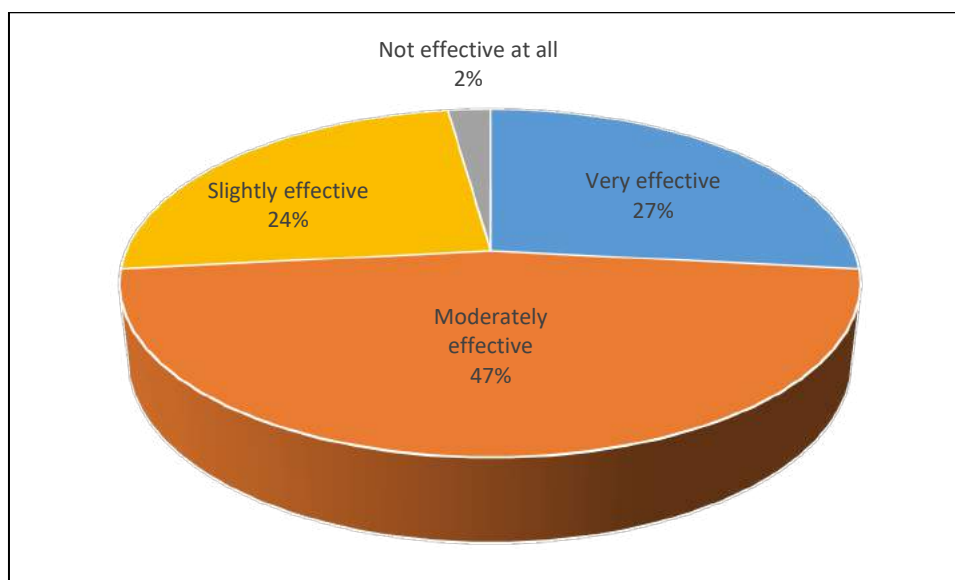
Q10. How effective have EU actions been in supporting tourism development?

As with question, respondents were presented with five possible responses to this question:

- Extremely effective
- Very effective
- Moderately effective
- Slightly effective
- Not effective at all

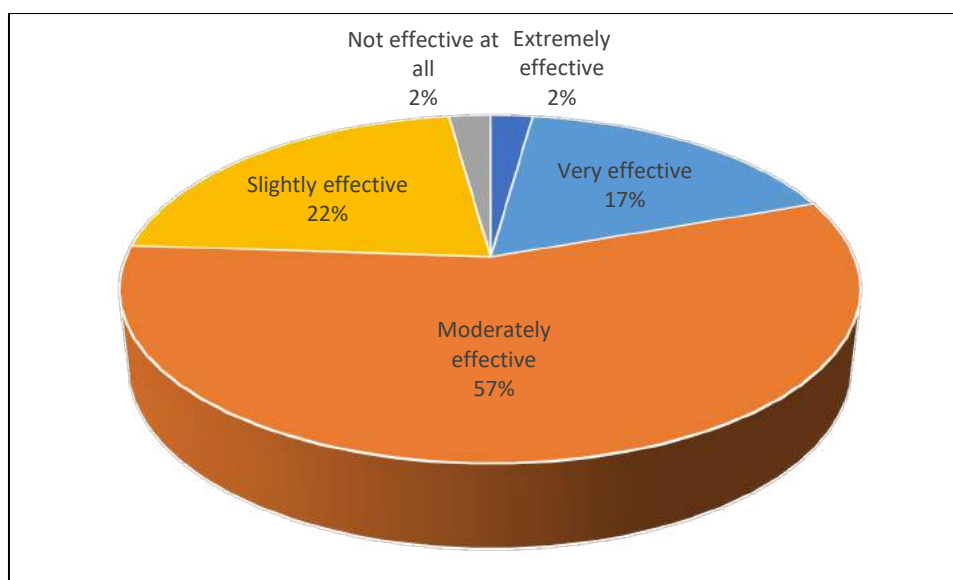
A quarter of respondents felt that EU actions had been very effective in supporting tourism development, whilst almost three-quarters felt that that they were moderately or slightly effective. However, one of the responses to Q11 suggested that there was a need *“To increase [the] number of specific calls for projects and additionally support European tourism through financial mechanisms and incentives that allow a wide array of stakeholders further investments in technology, green solutions, sustainable and green energy passive hotels/resorts/marinas and further support local communities in financing development of tourism infrastructure.”*

Figure 13: Specific calls for projects etc.



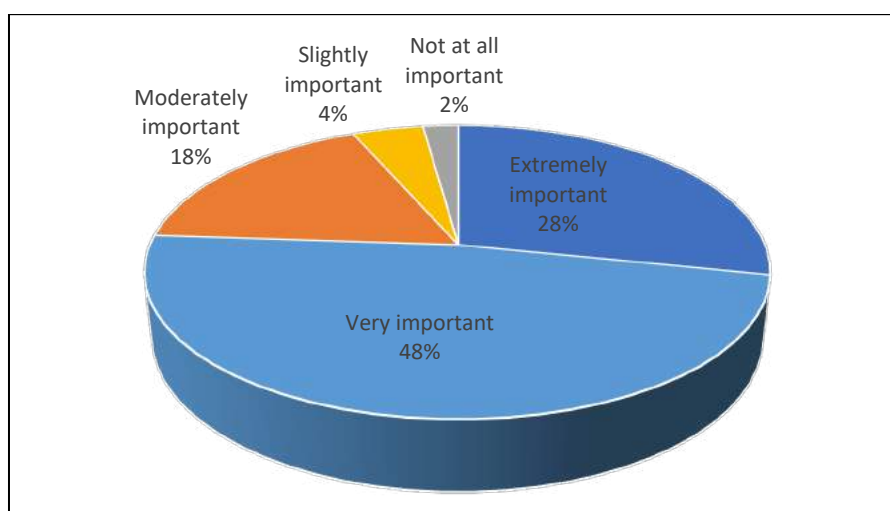
The perception of Europe wide initiatives such as EDEN (European Destinations of Excellence) was very similar, with the majority believing that these had been moderately effective and a fifth answering slightly or very effective.

There was also a suggestion from one respondent that programs should be focussed on specific areas of tourism, such as *“health tourism, active tourism with biking, sailing, extreme tourism, cultural tourism, nature tourism, sea tourism [which] require different solutions and management models”*. There should also be *“more support for tourism’s contribution to trans-sector goals, like climate change mitigation and adaption, social inclusiveness etc.”*.

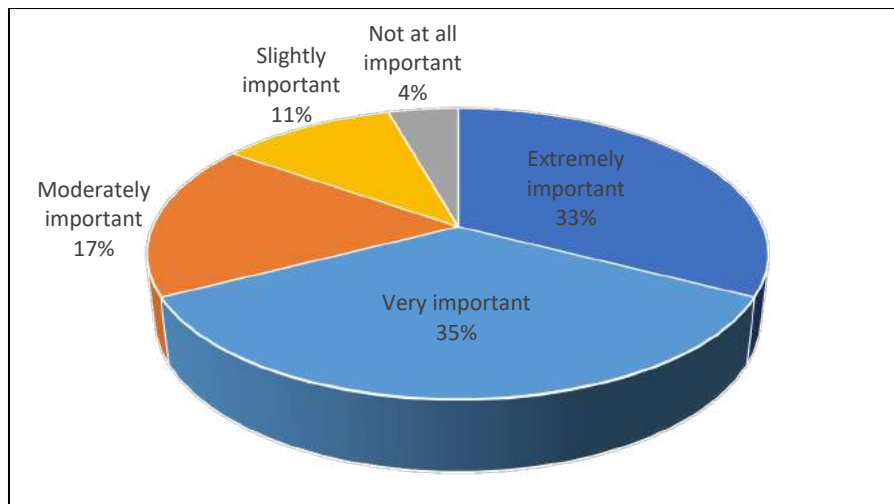
Figure 14: Europe wide initiatives (EDEN etc.)

Questions 12 and 13 were designed to test support for a greater EU involvement in European tourism development.

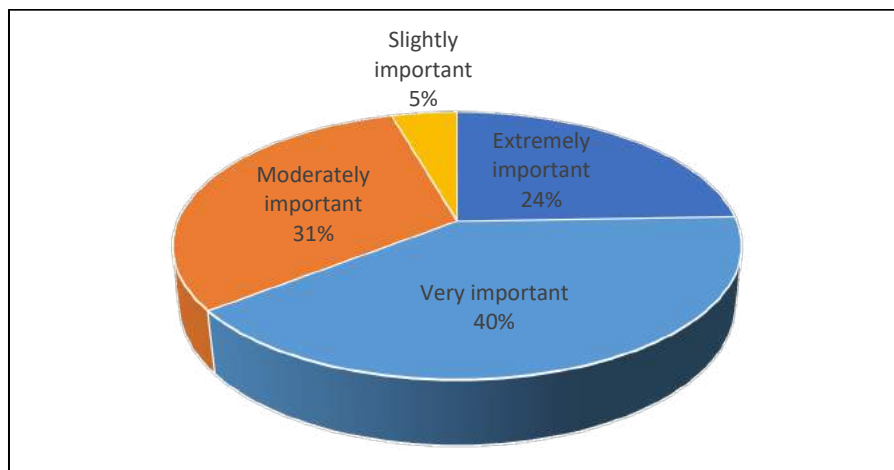
Q12. How necessary do you think it should be to introduce 'tourism' in the EU policies and structures?

Figure 15: A specific budget

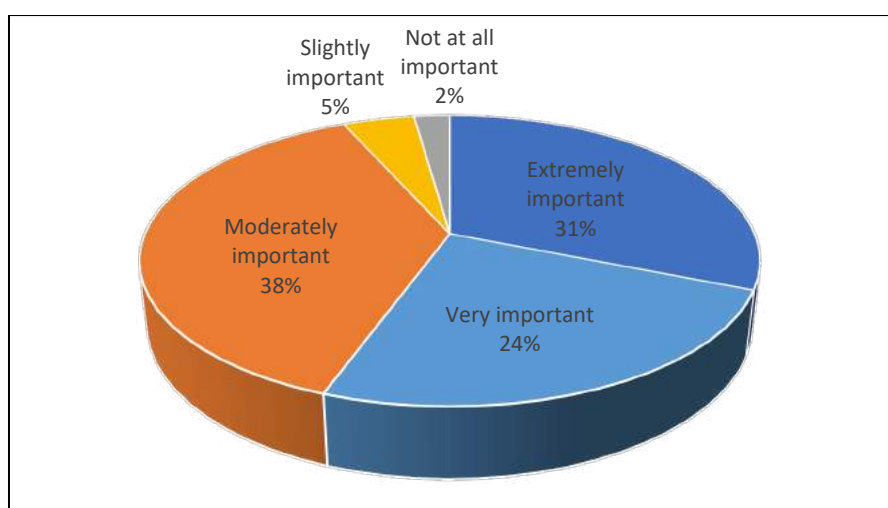
The responses to this question were overwhelmingly supportive of tourism having a specific budget, with over three-quarters of respondents considering this extremely or very important. One of the responses to Q11 suggested that there should be *"specific measures in the field of European funds concerning tourism, especially sustainable tourism for the integrated development of territories, with dedicated funding lines"*, which would require a dedicated tourism budget.

Figure 16: A specific DG

There was slightly less support for a 'tourism' DG, although two-thirds still felt that it was extremely or very important. Another respondent to Q11 suggests that it is important to consider *"tourism as a cross-cutting aspect of management and not just as a tourism industry"* and therefore a *"DG is required for tourism and not only linked to the business component as it has so far"*, whilst one suggests that *"more intersectoral cooperation with DG ENV, DG RTD AND DG EAC"* is needed.

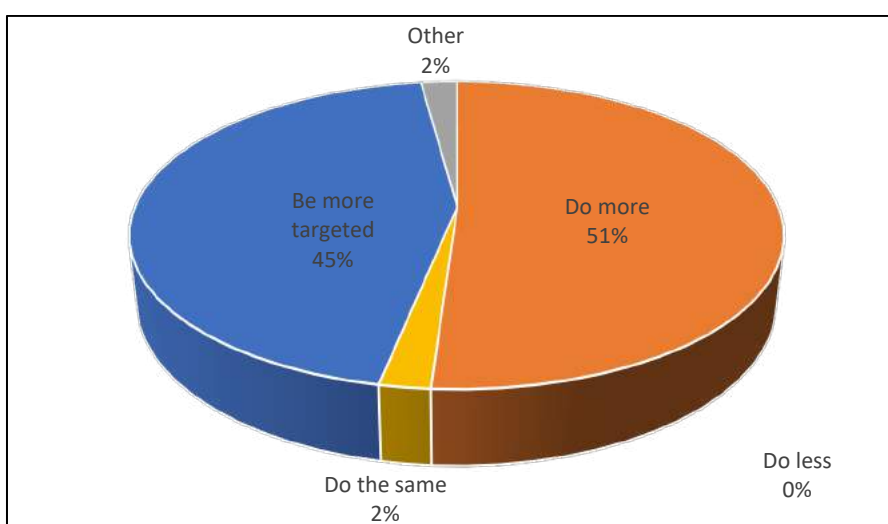
Figure 17: Specific European directives

Again, there was slightly weaker support for specific European directives, however, the majority still felt that this was extremely or very important. Although interestingly there were no "Not at all important" responses. However, there were several respondents who noted the lack of consistent and comparable tourism statistics for Europe, certainly compared to many other industries, and that this is a barrier to better management and policy action.

Figure 18: Specific European regulations

The introduction of specific European regulations was considered less important than the previous three possible levels of intervention. It seems that although there is in general support for EU interventions in tourism, this is less towards forms of regulation. However, over half still thought this to be extremely or very important and there may be a difference in the support for 'harmonisation', rather 'new' regulation and responses to both the interviews and open questions suggest that there is a need to update some regulations, removing those which are outdated or unenforceable and ensuring a 'level playing field' between traditional and new channels of delivery, such as in the evolution of online platforms.

Q13. Overall, do you think that the European Union should:

Figure 19: Overall do you think that the European Union should:

Despite some reservations that may be drawn from the responses to the previous questions the response to "do you think the European Union should" was very positive, with half suggesting it should 'do more' and more than two-thirds saying it should be more targeted; none suggesting that less should be done. Interestingly it is the private sector organisations that prefer "Do more", whereas the public sector were more inclined to respond "Be more targeted".

6. CASE STUDIES IN TOURISM

6.1. The Green Scheme of Slovenian Tourism

Destination description

The small European country of Slovenia, with a population of 2 million, has a rich natural and cultural offering. Bordered by Italy to the East, Austria to the North, Hungary to the West and Croatia to the South, Slovenia provides an attractive variety of four types of geographic regions: Alpine, Mediterranean & Karst, Thermal Pannonian and Central Slovenia, and Ljubljana. While the country is naturally green, here 'Green Tourism' refers to the three pillars of sustainability: economic, social and environmental (see Box 7) (UNWTO, 2019c) (for more information on the three pillars see section 4.5).

Box 7: Definition of Green Tourism

Green tourism means sustainable responsible tourism and addresses positive and negative tourism impacts in

1. natural,
2. socio-cultural, and
3. economic environment.

Source:(STB, 2019)

The National Strategy supports the growth of sustainable tourism, creating an exceptional customer experience, based partly on the 'green' services provided. Tourism is growing fast, in 2018 it reached 15.6 million overnight stays, 70 percent of which were international tourists (SURS, 2019). Slovenia has developed a reputation for sustainable and responsible tourism, being awarded the world's first Green Destinations¹⁵ *Green Country Award* in 2016 and has been recognised by National Geographic Traveller as one of the greenest and most responsible destinations through the award of a *World Legacy Destination Leadership* award (NGT, 2017). The active move towards sustainable and responsible tourism started ten years ago, when the Slovenian Tourism Board (STB) began to promote Green Tourism, not just as official strategy, but as a marketing tool. The transition has been affected through the use of international logos and winning international awards and, since 2015, the launch of the Tourist Board's *Green Scheme of Slovenian Tourism* (GSST).

Objectives and description of the tourism initiative

The main objective is to promote sustainability and responsibility in Slovenian tourism. GSST operates under the umbrella brand SLOVENIA GREEN, bringing all tourism sustainability and responsibility actions together, monitoring and improving tourism sustainability. It also promotes green actions through the Slovenia Green brands; 'Slovenia is green', 'Slovenia goes green', 'Slovenia promotes green', 'Slovenia makes you green'.

¹⁵ <https://greendestinations.org/>

Figure 20: Slovenia Green labels

Source: (STB, 2019)

The objective applies at all levels, destinations (municipalities), parks and tourism businesses (accommodation providers, travel agencies and tour operators). The scheme includes: a comprehensive and developmental approach, a national character (based on one of five categories: nature, cultural heritage, gastronomy, green innovations and green products) and international comparability. It is based on global and European sustainability standards, such as Green Destination Standard (GDS) and the European Tourism Indicators System (ETIS) and is also used as a tool for positioning and promotion.

Table 5: Slovenian Green Tourism Scheme

Item	Description
Scheme name	Green Scheme of Slovenian Tourism (GSST)
Scheme label	Slovenia Green
Declaration	Slovenia Green Policy Declaration
Global standard/ Indicators	Green Destination Standard (GDS) European Tourism Indicators System (ETIS)
International standard/ Criteria	Europarc Charter, Man and Biosphere Programme, Bio Hotels, Eco-Management and Audit Scheme (EMAS), EU Ecolabel, Green Key, Green Globe, Travelife.
National standard	Definition of local character and unique selling propositions (USP)
Organisations	European Commission (EC) Green Destination Organisation Slovenian Tourism Board (STB) GoodPlace Other organisations for labelling eco businesses

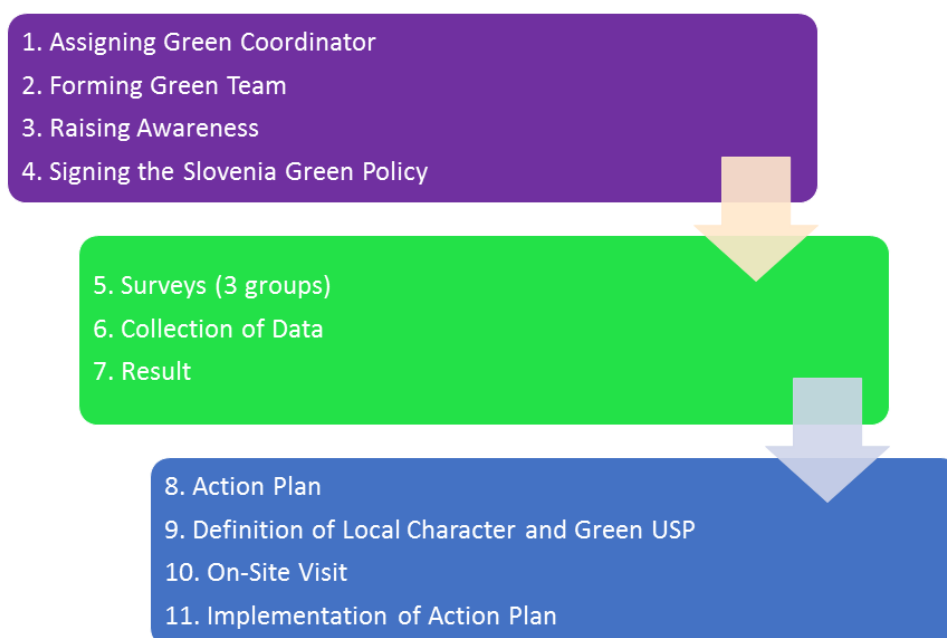
Source: (STB, 2019)

Using universal sustainability criteria means that the scheme is globally recognised and allows comparison with other international destinations and businesses. Each destination or business is assessed before being awarded a Slovenia Green label, although criteria and processes vary according to the type of destination or business.

The scheme merged two existing, reliable and internationally recognised systems, ETIS (promoted by the European Commission) and GDS (organised by Green Destinations), plus an additional measure called 'national character' for the destination level of award. Destinations are assessed through a structured approach, involving workshops covering the criteria and use of on-line tools to achieve gold, silver or bronze certificates, plus the submission of an action plan. As the scheme is process-orientated, annual reports about progress on the action plan are required and destinations are re-assessed against the standard once every three years. The Slovenia Tourist Board uses details of the destination's national character and unique selling points (USPs) in its promotions.

There are several defined steps in the process of getting certified. The first involves appointing the destination's Green Co-ordinator and a Green Team from different parts of the destination, they are responsible for raising awareness of the initiative. After signing the Slovenia Green Policy declaration, surveys are undertaken to collect data in six action fields of the green scheme. The requirements for a green certificate comprise 100 criteria and 131 indicators. After the analysis, an action plan is written, including the definition of the local character and its green USPs. The final two steps comprise the on-site visit by external auditors and the implementation of the action plan by the Green Team.

Figure 21: Steps to the accreditation of the GSST



Source: Adapted from Apih (2017)

Protected areas can choose between two routes to qualify for a Slovenia Green label. They may follow the green assessment and management process for destinations, described above, or qualify through an internationally recognised eco-label or 'green' brand, such as the Europarc charter or join the United Nations Educational, Scientific and Cultural Organization (UNESCO) *Man and Biosphere Programme*.

Businesses can qualify for a Slovenia Green Label, through one of six eco-labels: Bio Hotels, EU Eco-Management and Audit Scheme (EMAS), EU Ecolabel, Green Key, Green Globe or Travelife.

Leaders and stakeholders involved

The Green Slovenian Scheme was developed and is managed by the STB. Assessment, training and international promotion are carried out by the accredited partner - the GoodPlace Association for Sustainable Tourism, which is also a partner of the Green Destination organisation.

Financing

The STB pays the national costs for developing, monitoring, coordinating the scheme and any outsourced support. The Slovenian Ministry responsible for tourism subsidises companies to qualify for international eco-labels. In addition, participating destinations and tourism organisations pay membership fees and cover their own costs of monitoring, certification, management and review.

Implementation of the initiative

In 2009, the STB committed to sustainable tourism development with strategic guidelines and actions. The following year, a manual for hotels explaining the implementation of sustainable business models was published, and in 2011, a Partnership declaration for sustainable development was signed. Three years later, in 2014, the national strategic guidelines, the GSST, were adopted. The Scheme has speeded up the implementation of sustainable tourism development and growth in Slovenia.

The first pilot call, for green label applications for destination businesses was in 2015. Two more calls followed. Currently, 50 destinations (covering 75% of all tourism arrivals), 39 tourism businesses and four natural parks have been awarded the Slovenia Green certificate. Another nine destinations are in the process of obtaining the Slovenia Green label. In the future, other eco-labels will be validated through international standards, such as Blue Flag or the Private Sector Commitment to the UNWTO Global Code of Ethics for Tourism (UNWTO, 2011).

Key lessons learned

Key issues regarding the development of sustainable tourism emerged through the evaluation of Slovenia Green in destinations and businesses. The feedback highlighted the need for further policy implementation, project development and efficient promotion by both the Ministry (Economic Development and Technology) and the STB and identified the need for further research into areas such as management tools for developing visitors flows.

The GSST has achieved considerable success: having been presented at numerous international conferences as an approach to address sustainable tourism development systematically and having won international awards such as the National Geographic Destination Leadership award (2017). Learning about the scheme and how to manage sustainable tourism development at a national level has also encouraged a number of initiatives in other countries. The STB has proposed that the European Travel Commission (ETC) adopt the Slovenian model as a recommendation to other EU countries, or to start developing a European Green Tourism Scheme using this model.

6.2. UNWTO Framework convention on a Code of Ethics for Tourism

Upgrading the code to a more binding instrument of international law

Introduction

International and domestic tourism is growing, and so are its positive and negative impacts. In 2018, strong international tourism growth resulted in 1.4 billion international tourist arrivals worldwide. The Middle East and Africa led the growth in 2018/17 (+10 and +7 %), followed by Asia and the Pacific and Europe (6 %), while the Americas saw growth of 3 % (UNWTO, 2019d). Tourism brings benefits in the form of development, employment and earnings; yet imposes negative impacts, such as crowding, overtourism, overuse and destruction of resources, pollution and degradation, high prices, inequality, unequal access to its benefits, irritation of locals and visitors (Young, 1973). Sustainable tourism growth strives to keep negative impacts at socially, culturally, psychologically, environmentally and economically acceptable levels. Sustainability is a key part of world tourism development, but more still needs to be done, according to the UNWTO and UN Environment, supported by findings from a substantial research into tourism sustainability (Mihalic, 2016).

The Global Code of Ethics in Tourism for more sustainable and responsible tourism

The gap between conceptual sustainability and taking responsibility for implementing sustainable tourism in the real world is increasingly evident. In 1999, the thirteenth WTO General Assembly in Santiago, Chile, adopted The Global Code of Ethics for Tourism (GCET) as a voluntary instrument to help guide all tourism stakeholders towards the development of sustainable tourism worldwide. The Code became the world's main policy document on sustainable and (later) responsible tourism.

Box 8: Principles of the Global Code of Ethics for Tourism

1. Tourism's contribution to mutual understanding and respect between people and societies
2. Tourism as a vehicle for individual and collective fulfilment
3. Tourism, a factor of sustainable development
4. Tourism, a user of the cultural heritage of mankind and contributor to its enhancement
5. Tourism, a beneficial activity for host countries and communities
6. Obligations of stakeholders in tourism development
7. Right to tourism
8. Liberty of tourist movements
9. Rights of the workers and entrepreneurs in the tourism industry
10. Implementation of the principles of the Global Code of Ethics for Tourism

Source: (UNWTO, 1999)

The GCET reminds both public and private tourism stakeholders to cooperate in the implementation of these principles and to monitor their effective application (last principle above). The ten principles of the code cover all three pillars of sustainability in travel and tourism: socio-cultural, economic and environmental (see section 4.5). The principles of the code are promoted and supported by the UNWTO and its body, the World Committee on Tourism Ethics (WCTE).

Figure 22: Old and new cover pages of the Global Code of Ethics for Tourism

Source: (UNWTO, 1999, 2012)

Almost all governments have declared their willingness to adopt sustainable tourism strategies, but most documents on sustainable tourism lack the force needed to produce strong action. In 2012, the UNWTO added "For Responsible Tourism" to its subtitle (Figure 23) and replaced its 'sustainable tourism' document with one titled "Sustainable and Responsible Tourism" (TSG, 2007, 2012). These update the concepts and vocabulary and reflect a greater focus on responsibility to act and behave sustainably. The WCTE and UNWTO began to address the gap between declaring allegiance to sustainable tourism and taking responsibility to ensure tourism development is sustainable. (On the sustainability / responsibility gap, see also section 4.5).

Objectives and description of the tourism initiative

Despite widespread global acceptance of the GCET by both public and private sectors, as a voluntary instrument, the Code is not officially binding. The UNWTO felt that a stronger, more binding instrument was needed to implement the principles and speed up the transition to sustainable and responsible international and domestic tourism. Thus, the UNWTO and its WCTE advocated a convention and in 2015 the UNWTO General Assembly in Chengdu, China, agreed to start converting the voluntary Code of Ethics into an international legally binding convention open to ratification of Member States.

Table 6: Steps in upgrading the Code to a Convention

Year	Title of the document
1999	Global Code of Ethics for Tourism (GCET)
2012	Global Code of Ethics for Tourism: For Responsible Tourism
2019	Framework Convention on Tourism Ethics*

*Adoption is foreseen at the UNWTO General Assembly 2019.

Source: (UNWTO, 1999, 2012, 2019e)

The English text of the Convention was approved at the meeting of the UNWTO General Assembly in September 2017, A/RES/707(XXII). This has been translated into Arabic, French, Russian and Spanish and these translations, published by the UNWTO Secretariat, are being revised and validated by each linguistic group.

The ballot vote on the adoption of the Convention took place at the UNWTO General Assembly in September 2019 in Saint Petersburg. Once adopted by the General Assembly and authenticated in all five official UNWTO languages, the Convention will be open for signature and subsequently subject to ratification, acceptance or approval.

Leaders and stakeholders involved

The transition from the Code to Convention has been managed by the UNWTO Secretariat, with a strong support and expertise from its WCTE and member states. The document was presented and discussed among the member states and given support at the last UNWTO General Assembly meeting in Chengdu in 2016, where the English version was approved.

Implementation of the initiative

The Framework Convention on Tourism Ethics has been adopted by consensus at the 23rd General Assembly in St. Petersburg on 11 September 2019 (UN, 2019). The Convention will be open for signature on 16 October 2019 for the duration of one year. It will come into force and become the subject of international law after being signed by a minimum of two countries. Governments will be free to adopt the Convention or to continue their tourism sustainability transition by following the 1999 Code of Ethics in Tourism. The content of both documents is almost identical.

Key lessons learned

The need to convert the Code of Ethics for Tourism into a more legally binding Convention illustrates the need for a stronger drive for action on sustainable tourism. It also reflects a new paradigm for stronger political leadership and moving beyond the perspective of tourism as 'just another industry', recognising the social and environmental benefits as well the economic (for more on this perspective, see the section 4.5). The GCET was adopted in 1999, twenty years ago. In the past twenty years, the tourism industry has grown, in size and importance, yet the gap between the idea of sustainability and acting sustainably has also grown, necessitating stronger measures. The Convention aims to reinforce responsibility of member states for sustainability through action.

6.3. Urban Tourism: The Case of Barcelona

Description of the destination

Barcelona is a cosmopolitan city on the Mediterranean shore with an area of over 100 square kilometres and 1.6 million inhabitants. It has grown as an international tourist destination since the 1992 Olympic Games, with tourism being a key factor in successive transformations of the city. Currently it is the seventh most popular European city destination with over 19 million bed-nights in 2018.

It is fair to say that Barcelona, together with Paris and London, is one of the main assets in the promotion of Europe throughout the world. Thus, besides regions and states, it is important to acknowledge the key role of cities in the tourism promotion to inbound tourism markets.

However, in recent years, tourism activity has been increasingly felt, particularly by the local population and this has forced the City Council to incorporate the 'community's voice' in the deliberation on tourism and how to implement more sustainable urban tourism management.

Objectives and description of the tourism initiative

The exponential increase in tourist arrivals is creating considerable challenges for some destinations and their residents. Urban areas like Barcelona are already experiencing such pressures, and thus have realised that the best way forward is to develop a sustainable strategy focusing on liveability, authenticity, sense of localism and quality of life. By acknowledging long-term residents as their biggest asset, they have implemented several urban innovation initiatives with special focus on private-public partnerships. The new strategic vision of destination Barcelona is the shift towards a new paradigm from DMO (Destination Marketing Organization) to DMMO (Destination Management and Marketing Organization), in line with the European Cities Marketing network vision (see <https://www.europeancitiesmarketing.com>).

Leaders and stakeholders involved

Barcelona City Council, Turisme de Barcelona

Implementation of the initiatives

Since 2011 Barcelona is a Biosphere certified destination a voluntary certification system based on the principles of sustainability and continuous improvement¹⁶. In this context, the city created a program called *Commitment for Sustainable Tourism*, to recognise businesses that manage their activities in a sustainable way and help them by providing training, investment and assessment.

The territorial scale of a destination is being expanded because tourists are changing the way they visit and consequently, modifying their consumption patterns. In this sense, since its foundation, Turisme de Barcelona has managed the destination in a more strategic way by cooperating with attractions situated in the surrounding territory, such as the Dalí Museum in Figueres, Port Aventura Leisure Park in Tarragona and the Benedictine abbey Santa Maria de Montserrat.

In addition, the program *Barcelona is much more* was created in 2014 to include the provincial territories of Barcelona in the promotion of the city, from the beach to the Pyrenees mountains. The main goal of this initiative was to increase diversification, taking advantage of the surroundings resources' richness and extending the benefits of tourism generated by the city of Barcelona, beyond the city.

A further success from the collaboration between Turisme de Barcelona and the Regional Tourism Board of the Barcelona province, is a project called Destination Barcelona, which successfully merged the two convention bureaus (the city one and the regional one) into one, the Barcelona Convention Bureau, serving both the city and the wider region.

An initiative to protect authenticity and increase liveability while involving citizens was the creation of a public-private partnership between Turisme de Barcelona, the City Council, neighbours, institutions and business representatives. This open participation body is a place to discuss issues and make proposals for improving the development of Barcelona's tourism sector, but it has also become a platform where the different stakeholders can share their thoughts and ideas around the kind of city that they want to live in.

Key lessons learned

Shifting a destination's priority from marketing to management is not an easy task, especially when sustainable practices are the goal. It requires long-term commitment from both private and public institutions, strong partnerships and a will to involve citizens. The recognition comes after many years

¹⁶ See <https://www.biospheretourism.com/en>

of hard work. In 2018 at the World Responsible Tourism Awards in London, Barcelona won a Gold Awards in the Best for Managing Success category. The jury recognised the initiative to separate the promotion from management, as well as to transversally tackle the tourism phenomenon, believing that their experience should inspire other destinations. In addition, during the UNWTO General Assembly held in September 2019 in Saint Petersburg, Barcelona received recognition for the promotion of accessible tourism in a destination.

6.4. Climate change and coastal destinations¹⁷

Introduction

Tourism has a key role in our relationship with the coast; it facilitates access to blue spaces (aquatic environments) which are increasingly linked to health and wellness (see Gammon and Jarratt 2019, Wheeler et al. 2014, White et al. 2010) and it is of obvious economic importance. No form of leisure tourism is more significant in scale or value than coastal tourism. The United Nations estimates that “approximately half of tourists visit a coastal area” (UNWTO, 2013, p.8). 51% of hotel bed capacity within the European Union is concentrated in coastal areas and tourism is by far the largest employer along its coast. Yet, coastal municipalities account for only 15% of the EU’s land area and 21% of its population (European Commission, 2017a, European Commission, 2017b). Indeed, coastal tourism has been one of the fastest growing elements of the world’s largest industry for some time. However, coastal tourism maybe become a victim of its own success as it contributes to carbon emissions thereby feeding into climate change which now threatens coastal tourism destinations across the globe.

The implications of climate change

In the coming decades, the key environmental threats to coastal locations include sea-level rise and increased extreme weather events resulting from human-induced climate change. Analyses of melting of the Greenland and Antarctic ice-shelves, plus modelling of national emissions contributions stemming from the 2015 Paris Climate Agreement continue to cause academics to lean towards a 3-4°C rise above pre-industrial levels, with an expected sea level rise of between 50cm and 2m, and unprecedented flood risks at coasts resulting from both sea level rise and extreme weather (Nicholls et al., 2010; DeConto et al., 2018; Vousdukas et al., 2018). In addition, extreme weather events such as those recently seen in US coastal national park destinations where sea level rise and storm-surge acted synergistically will magnify coastal problems (NPS, 2018). The implications for international tourism are numerous. Notably, predicted submersion and erosion impacts make coastal destinations the most affected (Nicholls et al., 2010). Disappearing beaches in the Caribbean have already negatively affected tourist demand (Scott et al., 2012). Coastal communities and destination developers are at the forefront, being at higher risk of flooding and extreme weather, whilst also more dependent on the preservation of natural tourism assets such as beaches (Hamin & Gurran, 2009).

Examples of good practice in adapting to climate change

In Mexico, a series of climate change vulnerability studies focused on 20 of Mexico’s popular tourist destinations were conducted between 2012 and 2016 at the request of the Ministry of Tourism. The studies involved assessment of destination climatic vulnerability and risk and facilitated workshops with local stakeholders, adopting a cost-benefit approach to evaluate various adaptation measures to

¹⁷ This case study is based on a forthcoming article by Dr David Jarratt (University of Central Lancashire) and Dr Nick Davies (University of Salford) entitled ‘Planning for Climate Change Impacts: Coastal Tourism Destination Resilience Policies’. The article was submitted to the Journal of Tourism Planning and Development in the summer of 2019.

be actioned by the tourism sector in each destination, including early warning systems (UNWTO, 2018b). The information gathered was important for building up resilience of local communities and informing the nature of future tourism developments. Importantly, the Mexican studies identified areas where tourism should and should not be developed, and guided decision-making on promoting sustainable tourism activities. For example, most development for the Mayakoba Tourism Development in Quintana Roo lies further inland than is typical for coastal mass tourism developments, which tend to use as much as the immediate coastline as possible. Much of the environmentally sensitive mangroves and dunes are purposefully left intact and act as part of the attraction of this eco-resort, which largely sits behind these environments (Tourism for SDGs, 2018). In addition, the development has created new aquatic and coastal habitats and boosted biodiversity in the area (UNWTO, 2018b). The benefits are clear – biodiversity is improved, a natural buffer zone is in place to protect the main part of the resort from the impacts of climate change and the improved environment provides a tourist attraction. Indeed, Mayakoba is badged as an eco-resort and has one of the highest occupancy rates in Mexico. The gain here is both environmental and economic. The examples are promising, but also recent, making it impossible to assess longer-term success. Nevertheless, this is a potentially useful model for future tourism and intrinsically more resilient.

Integration of tourism policy with careful detail to individual circumstances is key to ensuring more widespread adaptation. Recently, in Samoa, the national level policy framework was applied to individual destinations with a set of criteria to build resilience into tourism development. Public and private sector collaboration was crucial, and operators had to adhere to the framework. The adaptive capacity of Samoa is dependent on shared cultural memories of past extreme events and predominantly indigenous socio-cultural networks influence collaboration (Parsons et al., 2018). Similarly, Mycoo (2018) examined small island states in the Caribbean region and found that a combination of development approaches focused on prioritising wetlands, forests and other natural habitats at the coast and moving urban tourism inland will be of importance in offsetting human health problems associated with global temperature rises over 1.5°C.

Whilst the focus here is on policy at the national level, it is important to note that good practice is happening on a smaller and local level, in places like St. Augustine Florida, which are prone to sea level rise and flooding. These local schemes tend to involve the mobilisation of local people and offer practical advice, such as how to protect their homes from flooding. However, these approaches are ad-hoc and a more is needed and any scheme, whether regional or national, should always focus on local issues, as the risk from climate change vary depending on geography and the community in question.

Planning the future of coastal tourism

The Mexican example demonstrates that destinations can be more resilient and attractive to tourists by preserving natural coastal environments, 'if' they have the flexibility and foresight to do so. However, in developed areas suffering from the 'coastal squeeze', where these areas no longer exist and where urban populations reside, the choices seem much more difficult (Jarratt, D. & Davies, N., 2019). In some instances, land can be sacrificed to allow the establishment of new natural buffer zones, in other places (e.g. Venice) lagoons can be maintained, improved and conserved.

Figure 23: Factors driving coastal squeeze

Source: Davies & Jarratt (2019)

The solution lies in managing the physical resource by increasing stakeholder partnerships between locals and tourists at coastal destinations and emphasising their ownership of and responsibility to the natural environment. This would also provide a visible focal point to help close the attitude-behaviour gap between 'what is said' and 'what is done' (Jarratt, D. & Davies, N., 2019).

Conclusion

Our relationship with nature is a significant variable in our shared relationship with the coast. Destination developers will have to undergo a systemic rethink of what assets actually are. Whilst some assets (such as coastal heritage sites) will be lost, what can be gained? (Jarratt, D. & Davies, N., 2019) Those planning urban spaces have moved from promoting 'no net loss' of biodiversity at development sites to net gain (Bull & Brownlie, 2017). It is recommended that more integrated and place-specific policy is needed and that in particular, destination developers should consider the three forms of resilience: engineered, ecological and evolutionary and how they should be integrated at destinations.

Undoubtedly, the coast is set to change. Over time many existing coastal communities will move or be abandoned. The world has seen its first refugees as a direct result of climate change. Many coastal areas are likely to focus attention on buffer zones between sea and land such as wetlands or natural floodplains, whilst some cities will continue to engineer barriers to keep waters at bay and beaches will be altered and to make this happen, more aquatic areas and green spaces should be retrofitted into cities and tourist destinations. Already tidal lagoons are viewed as leisure resources and urban beaches are popular (Reichert & Lanzer, 2015).

Recommendations

- Tourism policies and plan need to acknowledge climate change. All too often it is ignored or not seriously considered.
- Plans should follow a two-step process 1 - assess vulnerability, 2 - plan to improve resilience
- The above steps, and evolutionary resilience more generally, rely on a good understanding of local factors and inclusive engagement with local people/stakeholders.

- Destination developers/managers should consider the three forms of resilience: engineered, ecological and evolutionary and how they should be integrated at destinations (Jarratt, D. & Davies, N. ,2019).
- Developers need to consider not only what will be lost but can be gained – new environments between the land and sea which will hold the potential for tourism.

6.5. Next Tourism Generation Alliance (NTG)

The NTG is a four-year European project whose aim is to improve the level of tourism education in order to address the skills gap that is emerging in European tourism. It is a direct collaboration between education and industry to ensure that the skills acquired more closely with those needed by the industry in future.

It is developing a set of core modules covering the digital, green and social skills, which will be available to employees, employers, entrepreneurs, teachers, trainers and students across the industry. The aim is to provide tourism professionals with better work and career prospects, by matching the skills needed by the industry.

Integrated into the current European vocational education and training (VET) system it will provide a set of benchmarks and tools across 5 sub-sectors:

- Food & Beverage,
- Accommodation,
- Visitor Attractions,
- Destination Management,
- Travel Agents & Tour Operators.

The objectives of the project are to:

- To improve the relationship between Industry and Educational Providers in the Tourism sector;
- To provide concrete innovative and highly relevant skills products and tools and respond to skills need;
- To provide a detailed assessment of the current and anticipated skills shortages, gaps and mismatches in the sector;
- To develop a common methodology for assessing the current situation, anticipating future needs and monitor progress to respond to skills gaps;
- To identify, describing and indicating priorities for the review or the establishment of new qualifications;
- To improve image of tourism career pathways at company and educational level.

Preliminary research findings

The tourism and hospitality industry struggles with self-image for its staff. Many of the jobs are low paid and assumed low skilled, meanwhile the demands of tourists for more personal and authentic experiences has led to a demand for a more skilled labour force in tourism industries both for competitive advantages and for customer satisfaction. The proposed educational modules will target the concepts of social skills, green or sustainability skills and the changing face of technology in

tourism. This approach provides a sound basis for European coordination in terms of education of the future generations of tourism workers. It provides an excellent opportunity to shape both the prospects and potential face of tourism quality in the near future.

Box 9: NTG expected short term results (2018-2020)

1. Skills Assessment - Responses methodology
2. 8 Skills Industry led group
3. NTG Skills Matrix
4. Next Generation Tourism Skill toolkit
5. Human Resources Framework
6. Quality Framework for NTG products
7. Ten Case Studies of Best Practices
8. 3 Pan European NTG Modules reflecting the 3 Core Skills Sets

There is increasing skills gap between current and future needs within the tourism industry. This has been growing over recent years due to several factors, such as the development of new digital technologies and the demands of climate change. The NTG case provides an interesting example of how industry and trainers can work together to close the gap and ensure that the tourism industry has a workforce ready to meet these challenges. There is clearly an opportunity to extend the impacts of the project, by supporting the consortium's long-term ambitions to widen the take up of the programme.

Box 10: NTG expected long term results (2020-2021 and beyond)

1. BluePrint Strategy and Action Plan
2. The NTG Established Partnership
3. NTG Regional Hubs
4. Multiplier effects through regional funds in the eight countries and behind

7. CONCLUSIONS AND RECOMMENDATIONS

This study has investigated the latest developments in European tourism and identified a number of future trends and challenges that will need to be addressed if the industry is to continue to grow and become genuinely sustainable. The study makes a number of recommendations based on these findings, which are set out in this section of the report.

Sustainable tourism development

The shift to more sustainable forms of development is one of the major trends and challenges. Sustainability is not a new concept; however, the latest iteration encompasses climate change mitigation and adaptation measures, and more recently social awareness movements such as ‘flying shame’. Many stakeholders within the tourism industry agree that the impacts of global warming and climate change, including extreme weather events, are a threat to natural areas and biodiversity. There is a need for increased civil awareness, new technologies and policies to cope with global warming and climate change.

A sustainable socio-cultural tourism destination is one that addresses the opportunities and impacts tourism has on a society and its cultural and natural heritage. It considers tourism as a driver that can both improve and affect the quality of life for local communities and residents, and it integrates the ‘tourism for all’ principles along the whole tourism value chain (NECSTouR, 2019).

An EP report from 2017, *From Responsible Best Practices to Sustainable Tourism*, concluded that there is a lack of data with which to measure the social and environmental effects of tourism, and that the industry fails to internalise many of the external costs of tourism. The report stated that “Tourism, environmental and transport policies in the EU need to integrate better to create sustainable development” (Peeters et al., 2017).

Overtourism is a recent concept, although its symptoms may have been in evidence for some time. It is a consequence of too many visitors causing overcrowding and congestion at a destination, often bringing tourists into conflict with the local population. Overtourism requires context specific responses and custom-made policies for each particular setting. It requires collaborative and participatory responses, including representatives of the local population, institutions and policy-makers, industry and academia. Action is needed to reduce seasonality and peak demand at some destinations. The EP study *Overtourism: impact and possible policy responses* from 2018 concluded that a common set of indicators cannot be defined because of the complex causes and effects of overtourism. The quality of life, for residents, for visitors, for everyone should be the starting point for any future initiative.

So that tourists can make informed travel choices, there is a need for some form of accreditation system. In 2018, the EP published a study *European tourism labelling*, which concluded that the existing volume and variety of labels has become a barrier to consumer choice. The study recommended that a harmonised EU certification system be established and the potential for a single European tourism label investigated further.

Investment in technology

Changes in the way tourists and the tourism industry have used ICT over recent decades has had one of the most significant effects on the industry and the way tourists travel and experience destinations; this is likely to continue in the future. A study for the EP in 2015, *The digitisation of tourism enterprises*, found that the effects of recent information technology developments on tourism SMEs in the European Union were profoundly disruptive to traditional business models of tourism information and distribution.

ICT will be useful in many aspects of future tourism development. Destinations will be able to predict service demand and better manage massification and overtourism. Tourists will use artificial intelligence, Internet of Things, virtual/augmented reality, virtual consumption, etc., to consume tourism products and services. Increased use of smart technology will lead to smart mobility, which has potential to boost sustainable transportation.

Action is required to support research, education and cooperation in ICT implementation and use among destinations and tourism technology businesses. In particular, four specific actions are needed. Firstly, the development of a monitoring system designed to identify changes in both the tourism environment and supply and demand trends. This will give tourism professionals a tool to improve the management of their activities. Secondly, the regulation of big data owners to give better data transparency and security. Thirdly, adopting regulations covering the use of artificial intelligence and robotics, based on principles of human rights and democracy, to protect privacy and misuse of information. Finally, an appropriate regulatory framework for the sharing economy should be established.

Effective tourism governance

The relationships between the different stakeholders affect the ways in which effective governance structures are established. Governance structures should allow more resilient, stable and secure destinations to be built. Within this new governance scheme, partnerships are pivotal, and they are built upon the need for shared success, trust and consistent communication. The European Cities Marketing (ECM) Manifesto suggests that the 'more flexible, outward-looking organisations are more agile and able to prepare for and react to disruption more quickly and effectively'.

Stakeholder mapping could be adopted as a tool for the effective management of stakeholder networks. Small firms should receive special attention as active stakeholders in destination ecosystems, but their participation should be more straightforward and effective. Host communities and environmental stakeholder's representatives should be given a more prominent status. In addition, tourists should be given a more explicit recognition and their needs and concerns also given adequate status. Strategies should be developed to educate tourists to be more environmentally sustainable and socially respectful when travelling.

Innovative tourism governance can contribute in tackling the uneven distribution of visitors (under and overtourism) in destinations. Smart destination management and promotion includes managing visitor flows, sustainable mobility and accessibility, facilitating business intelligence and SME innovations. Contemporary tourism governance and policy will contribute to the creation of more sustainable and responsible tourism models, and more effective dialogue between local residents and visitors. The development of regional innovation ecosystems based on clusters will stimulate destination competitiveness. Actions and policies should be addressed in order to increase knowledge exchange, focusing on the challenges faced by tourism destinations in becoming more sustainable. Finally, since we cannot manage what we cannot measure, a system that will allow the measurement of tourism impacts and sustainability should be developed, for use in policy decision making at regional, national and European level, and also for business intelligence in the destinations.

European tourism marketing

There is a need to enhance Europe's overall destination brand by better coordination between different countries and stakeholders. In the last decade tourism has become a very specialised industry, with new niche markets developing, i.e. wellness tourism, eco-responsible tourism, community led (bottom up) tourism, staycation/domestic tourism, older/retired market, etc. In addition, social networks have a major impact in today's tourism marketing. Therefore, European destinations need to revise their

traditional marketing strategies. The use of ICT is essential in order to design innovative destination marketing and promotion actions for the future. Finally, training is needed to move from marketing to strategic destination branding. All national, regional and local governmental institutions need to work collaboratively with DMOs in order to develop the most efficient strategy for their destination.

New skills and training

Many jobs in the tourism industry suffer from an image problem, which is in part due to issues such as seasonality and poor working conditions (often referred to as 'McJobs'). Many potential future employees' first experience of the industry is through holiday jobs; these first impressions are often not favourable. There is also likely to be a significant 'skills gap' between current workforce and the future needs of the industry, such as the challenges posed by the increasing digitisation of the industry and coping with sustainable destination development.

Talent, entrepreneurial mindset, skills, and competences are enablers, allowing us to meet the current and future needs of the industry and help us deliver the tourism of tomorrow. Improvements in the capability of the workforce will enhance our ability to develop and deliver smart, sustainable destinations (NECSTOUR strategy).

The need for better training programmes in order to increase the skills and competences of the labour force required by the tourism industry in the future has been identified by many stakeholders participating in the study as one of the urgent priorities for future action. In this sense, there is a need for the creation of a European tourism training qualification, visible and accepted across the EU. This should support the (re)training of the present and future tourism workforce.

There are existing initiatives that could be used as a model, such as the Next Tourism Generation (NTG) Alliance. NTG is the first European partnership creating a collaborative and productive relationship between education and industry based on a scalable mechanism and model for sustainable and digital curricula. It provides employees, employers, entrepreneurs, teachers, trainers and students with a set of modules in digital, green and social skills.

Any future initiative in this area should seek to improve the image of the industry, so that there is a perceptible shift, where tourism represents a higher value career.

Tourism and the European Union

The Treaty of Lisbon gave the European Union greater competencies in tourism. However, 10 years have now passed since this came into force and the industry has grown and continues to grow faster than the economy in general. It is therefore perhaps time to revisit the EU's role in its development, especially in light of new challenges, such as climate change. Particularly given the impact of tourism activities on climate change, and the potential impact of climate change on tourism activities. Such a situation calls for a more coordinated approach.

Interestingly, one of the findings of this study was the strong support for a clearer EU 'tourism structure' by industry stakeholders and for this to be supported financially. Under the current system, the various sectors which play a role in the tourism industry, transport, accommodation, hospitality, etc., are supported and regulated by different areas of responsibility within the EU, which can result in a lack of coordination. The study recommends the reinforcement of tourism organisational and financial structure within the EU by introducing a specific tourism budget, and whilst it might be impractical to have to separate departments with the same responsibilities, it would be feasible for one to have a coordinating role between the existing structures, ensuring that tourism had a voice in the development of policy where it impacted on the industry.

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ANNEX I: EUROPEAN UNION ACTIONS AND INITIATIVES IN TOURISM

European Fund for Strategic Investments (EFSI)

The European Fund for Strategic Investments (EFSI) is an initiative launched jointly by the European Commission and the EIB Group (European Investment Bank and European Investment Fund) to help overcome the worst financial crisis since the late 1920s by mobilising private financing for strategic investments. With EFSI support, the EIB Group is providing funding for economically viable projects, especially for projects with a higher risk profile than usually taken on by the Bank. It focuses on sectors of key importance for the European economy and may support tourism-related actions, such as, among other things:

- Travel infrastructures (regional airports, ports, etc.);
- Energy efficiency of hotels and tourism resorts;
- Revitalisation of brown fields for recreational purposes;
- Tourism SME financing agreements;
- Setting up “investment platforms” (IPs) dedicated to tourism.

EFSI is demand-driven and provides support for projects everywhere in the EU, including cross-border projects. Projects are considered based on their individual merits. There is the possibility to combined contributions from EFSI and ESIF (European Structural and Investment Funds).

Source: <https://www.eib.org/en/efsi/index.htm>

The 5 European Structural and Investment Funds (ESIF)

Over half of EU funding is channelled through the 5 European structural and investment funds (ESIF). They are jointly managed by the European Commission and the EU countries. The purpose of all these funds is to invest in job creation and a sustainable and healthy European economy and environment.

The ESIF mainly focuses on 5 areas: research and innovation; digital technologies; supporting the low-carbon economy; sustainable management of natural resources; and small businesses.

Source: https://ec.europa.eu/info/funding-tenders/funding-opportunities/funding-programmes/overview-funding-programmes/european-structural-and-investment-funds_en

European Regional Development Fund (ERDF)

The ERDF aims to strengthen economic and social cohesion in the EU by correcting imbalances between its regions by focusing its investments on several key priority areas - known as ‘thematic concentration’: innovation and research; the digital agenda; support for small and medium-sized enterprises (SMEs); and the low-carbon economy.

It may provide essential support to improve the competitiveness and quality of tourism at regional and local levels, notably in areas in industrial/rural decline or those undergoing urban regeneration. ERDF support may go to “thematic objectives and investment priorities” in line with the Europe 2020 policy priorities. The most relevant for the tourism sector are:

- Research and innovation (N°1)
- Information and Communication Technologies (N°2)

- Competitiveness of Small and Medium-Sized Enterprises (N°3)
- Shift to a low-carbon economy (N°4)
- Environmental protection and resource efficiency (N°6)
- Employment and support for labour mobility (N°8)
- Education, skills and lifelong learning (N°10)

ERDF not only supports regional and national programmes in the Member States. It also finances European Territorial Cooperation (ETC) which covers: Cross-border co-operation programmes (known as Interreg A), Transnational co-operation programmes (known as Interreg B, between regions from several EU Member States), and Interregional co-operation programmes (known as Interreg C, working at pan-European level).

Source: https://ec.europa.eu/regional_policy/en/funding/erdf/

European Social Fund (ESF)

The ESF is Europe's main instrument for supporting jobs, helping people get better jobs and ensuring fairer job opportunities for all EU citizens. It works by investing in Europe's human capital - its workers, its young people and all those seeking a job. Eligible actions are listed in the "Operational Programmes" prepared by the Member States. Depending on their choices, funding from the European Social Fund may be used, among other things, for:

- Training workers to help companies having to cope with restructuring or a lack of qualified workers;
- Training people in difficulty and those from disadvantaged groups to get better skills and jobs;
- Supporting mutual learning, establishing networks, and disseminating and promoting good practices and methodologies in the domain of social innovation.

Most actions are regional or national, but the ESF can also support transnational and interregional co-operation, depending on the approach defined in Operational Programmes.

Source: <http://ec.europa.eu/esf/home.jsp>

Cohesion Fund (CF)

The CF aims to reduce economic and social disparities and to promote sustainable development, and thus it is aimed at Member States whose Gross National Income (GNI) per inhabitant is less than 90% of the EU average. According to the investment and infrastructure needs specific to each Member State, the CF may support:

- Trans-European transport networks, notably priority projects of European interest as identified by the EU. The Cohesion Fund will support infrastructure projects under the Connecting Europe Facility;
- Environment: the Cohesion Fund can also support projects related to energy or transport, as long as they clearly benefit the environment in terms of energy efficiency, use of renewable energy, developing rail transport, supporting intermodality, strengthening public transport, etc.

For the 2014-2020 period, the Cohesion Fund concerns Bulgaria, Croatia, Cyprus, the Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.

Source: https://ec.europa.eu/regional_policy/en/funding/cohesion-fund/

European Agricultural Fund for Rural Development (EAFRD)

As the funding instrument of the second pillar of the EU's Common Agricultural Policy (CAP), the EAFRD aims at strengthening the EU's agriculture, agro-food and forestry sectors, as well as rural areas in general. Funds for rural development are allocated by Managing Authorities appointed by the Member States. Depending on the needs and choices of each Member State, support may be granted to:

- The diversification of farmers into non-agricultural activities; vocational training and skills acquisition actions (courses, workshops, coaching ... for instance on how to develop rural tourism), demonstration activities and information actions;
- Business start-up aid as well as investments for non-agricultural activities in rural areas (rural accommodation, shops, restaurants, guided tours, ...) engaged in sustainable and responsible tourism;
- Investments for public use in recreational infrastructure, tourist information and small-scale tourism infrastructure;
- Studies and investments associated with the maintenance, restoration and upgrading of the cultural and natural heritage of villages, rural landscapes and high nature value sites, including related socio-economic aspects, as well as environmental awareness actions;
- Co-operation involving at least two entities (creation of clusters and networks; co-operation among small operators in organising joint work processes and sharing facilities and resources and for the development and/or marketing of tourism services relating to rural tourism; ...).

Source: <https://www.fi-compass.eu/esif/eafrd>

European Maritime and Fisheries Fund (EMFF)

The EMFF is the fund for the EU's maritime and fisheries policies and seeks to increase employment and territorial cohesion in coastal and inland communities depending on fishing and aquaculture. This should be achieved by:

- The promotion of economic growth, social inclusion, creation of jobs and supporting labour mobility in these communities;
- The diversification of activities within fisheries and into other sectors of maritime economy.

This can cover tourism-related projects (see some examples in the above referenced publication '*Guide on EU funding for the tourism sector*'), such as eco-tourism (Donohoe & Needham, 2006), fishing tourism, local gastronomy (fish and seafood restaurants), accommodation, tourist trails, diving, etc., as well as professional training, life-long learning and the acquisition of new professional skills enabling professionals of the fisheries sector or their partners to enter into tourism activities or to carry out complementary activities in the field of tourism.

Source: <https://ec.europa.eu/easme/en/european-maritime-and-fisheries-fund-0>

Interreg

European territorial cooperation is one of the two goals of Cohesion Policy in the 2014-2020 period, besides investment for Growth and Job. European territorial cooperation, also known as Interreg, is funded by the ERDF. Interreg has three types of programmes:

- 1) Cross border (60 programmes known as Interreg A)

It supports cooperation between regions from at least two different Member States lying directly on the borders or adjacent to them in order to face cross-border challenges, such as crossing borders to find employment, receive better healthcare, make use of public facilities, receive emergency support or operate joint emergency services, taxation or pension rights issues, among others. Most of the remaining obstacles stem from diverging national legislations on either side of the border (national legislation is 'border-blind'), incompatible administrative processes, or simply lack of common territorial planning.

Source: <https://interreg.eu/strand-of-cooperation/interreg-a-cross-border-cooperation/>

2) Transnational (15 programmes, known as Interreg B)

It involves regions from several countries of the EU forming bigger areas where it aims to promote better cooperation and regional development within the Union by a joint approach to tackle common issues. It supports projects related to innovation, environment, accessibility, telecommunications, urban development, etc.

Source: <https://interreg.eu/strand-of-cooperation/interreg-b-transnational-cooperation/>

3) Interregional (4 programmes, known as Interreg C)

It works at pan-European level in order to build networks to develop good practice and facilitate the exchange and transfer of experience by successful regions. The four programmes are ESPON (European Spatial Planning Observation Network), INTERACT (it has an enabling role among territorial cooperation programmes), Interreg Europe (it helps regional and local governments across Europe to develop and deliver better policy) and URBACT (Driving change for better cities).

Source: <https://interreg.eu/about-interreg/>

Executive Agency for Small and Medium-sized Enterprises

The Executive Agency for Small and Medium-sized Enterprises (EASME) has been set-up by the European Commission to manage on its behalf several EU programmes in the fields of SME support and innovation, environment, climate action, energy and maritime affairs. Those programmes include COSME, LIFE, Horizon 2020 and EMFF (European Maritime and Fisheries Fund).

Source: <https://ec.europa.eu/easme/en/section/about-easme>

COSME

COSME is the EU programme for the Competitiveness of Small and Medium-Sized Enterprises (SMEs), which aims to facilitate SME access to finance, create supportive environment for business creation, help small businesses operate outside their home countries and improve their access to markets. It supports SMEs in the following areas:

- Facilitating access to finance;
- Supporting internationalisation and access to markets;
- Creating an environment favourable to competitiveness;
- Encouraging an entrepreneurial culture.

COSME is a programme implementing the Small Business Act (SBA) which reflects the Commission's policy to recognise the central role of SMEs in the EU economy.

Source: <https://ec.europa.eu/easme/en/cosme-0>

LIFE

The LIFE programme is the EU's funding instrument for the environment and climate action created in 1992. It has two sub-programmes: environment and climate action. In terms of tourism-related actions eligible for funding, the most relevant are those envisaged under the so-called 'Traditional Projects', which may take different forms:

- Pilot projects assess the effectiveness of a method/approach that is new or has been used in a different (geographical, ecological, socio-economic) context; they compare its results with those produced by best practices, in order to determine if the method should be tested on a larger scale (i.e. in a demonstration project) and inform stakeholders;
- Demonstration projects test and evaluate a method/approach that is new or has been used in a different context; they inform other stakeholders of the results and, where appropriate, encourage them to apply these methods/approaches;
- Best practice projects apply appropriate, cost-effective and state-of-the-art techniques, methods and approaches taking into account the specific context of the project;
- Information, awareness and dissemination projects related to one of the priority areas.

Source: <https://ec.europa.eu/easme/en/life>

Horizon 2020

Bringing together three previous programmes, Horizon 2020 is the EU Framework Programme for Research and Innovation (2014-2020). It is made of programme sections (also called "pillars"), some being divided in sub-sections. The most interesting sections for tourism are:

- Excellent Science, sub-section MSCA (Marie Skłodowska-Curie Actions) for career development and training of researchers – with a focus on innovation skills – in all scientific disciplines through worldwide and cross-sector mobility;
- Industrial Leadership, sub-section programme LEIT ("Leadership in Enabling and Industrial Technologies"), among other things, for greater competitiveness of the European cultural and creative sectors by stimulating ICT innovation in SMEs Technologies;
- Societal Challenges, sub-section programme "Europe in a changing world - Inclusive, innovative and reflective societies", to address in particular the issues of memories, identities, tolerance and cultural heritage;
- SME instrument for high-potential SMEs to develop ground-breaking innovative products, services or processes able to face global market competition.

Source: <https://ec.europa.eu/programmes/horizon2020/en>

European Destinations of Excellence (EDEN)

EDEN aims to promote sustainable tourism development models across the EU. The initiative is based on national competitions and promotional campaigns that result in the selection and promotion of a tourist 'destination of excellence' for each participating country.

Through the selection and promotion of destinations, EDEN effectively achieves the objective of drawing attention to the values, diversity and common features of European tourist destinations. It enhances the visibility of emerging, non-traditional European destinations, creates a platform for sharing good practices across Europe and promotes networking between awarded destinations. This

European quest for excellence in tourism is developed around an annual theme, chosen by the European Commission in conjunction with the national tourism bodies.

The key feature of the selected destinations is their commitment to social, cultural and environmental sustainability of tourism. The recipients of the award are emerging, little-known destinations located in the 28 EU countries and candidate countries. The EDEN initiative helps to spread the sustainable practices used in the awarded destinations across the EU.

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

Erasmus +

Erasmus+ is the EU's programme to support education, training, youth and sport in Europe, providing opportunities for over 4 million Europeans to study, train, and gain experience abroad. In order to promote innovation and employability, the programme supports tourism-related projects:

- Learning opportunities for individuals through Mobility Projects for Higher Education Students and Staff, a loan guarantee scheme to help Master's degree students financing their studies abroad and Mobility Projects for VET Learners and Staff (Vocational Education and Training);
- Cooperation between educational institutions, businesses, local and regional authorities and NGOs, mainly through Joint Master Degrees; Strategic Partnerships (allowing organisations from different socio-economic sectors to develop and disseminate, among other things, innovative practices leading to high quality teaching, training, learning and youth work); Knowledge Alliances:
 - a) to develop innovative and multidisciplinary approaches to teaching and learning;
 - b) to stimulate entrepreneurship and entrepreneurial skills among teaching staff and workers;
 - c) to facilitate the exchange, flow and co-creation of knowledge between higher education and enterprises);

Skills Alliances (to design and deliver joint vocational training programmes and teaching/training methodologies, with particular focus on work-based learning, providing learners with the skills required by the labour market);
- Not-for profit European sport events encouraging participation in sport and physical activity.

Source: https://ec.europa.eu/programmes/erasmus-plus/about_en

Employment and Social Innovation (EaSI)

The EaSI programme is a financing instrument at EU level to promote a high level of quality and sustainable employment, guaranteeing adequate and decent social protection, combating social exclusion and poverty and improving working conditions. Several tourism-related actions are eligible for funding:

- PROGRESS (Programme for Employment and Social Solidarity) supports analytical work useful for policy-making, social innovation and social policy experimentation (i.e. testing innovative policies on a small scale and up-scaling the most successful ones, including with the European Social Fund support).
- EURES (European job mobility) supports workers' mobility and helps companies recruiting in another European country via targeted mobility schemes (e.g. "Your First EURES Job" for

jobseekers between 18-30 years). Besides job matching and job placement support, these schemes may cover part of the SMEs costs of training newly-recruited workers and helping them settle in. They may also help job-seekers to pay for interview trip and/or moving abroad to take up a new job.

- EaSI Guarantee Financial Instrument may be used to help the setting up or development of small businesses / social enterprises, including for investment, leasing, and working capital needs, as well as the acquisition of licenses and other start-up costs.

Source: <https://ec.europa.eu/social/main.jsp?catId=1081>

ANNEX II: INTERVIEW PARTICIPANTS

The study team gratefully acknowledge the time given by the individuals and organisations listed below to participate in interviews. The contents and recommendations of the study are the sole responsibility of the authors and do not necessarily reflect those of the individuals or organisations listed.

Name	Position	Organisation
Edgar Martín-Blas	CEO	Virtual Voyager
Eduardo Santander	Executive Director	European Travel Commission
Eva Stravs	State Secretary	Ministry of Economic Development and Technology, Republic of Slovenia
Ignasi de Delàs	Deputy General Manager	Turisme de Barcelona
Jean-Claude Baumgarten	Senior Ambassador	World Travel & Tourism Council
Juan-Jesús García Sánchez	Director Industry Affairs	Amadeus IT Group SA
Kerstin Howald	Tourism Sector Secretary	EFFAT - European Federation of Trade Unions in the Agriculture, Food and Tourism Sectors
	Coordinator	ETLC - European Trade Union Liaison Committee on Tourism
Maurizio Davolio	President	European Alliance for Responsibility Tourism and Hospitality (EARTH)
Pascal Lamy	Chair of the World Committee on Tourism Ethics	United Nations World Tourism Organisation
Silvia Barbone	Director	JLAG / Foundation for European Sustainable Tourism

ANNEX III: SUMMARY OF SURVEY PARTICIPANTS

Summary of respondents by organisation type and scale

Organisation type	%
Tourism organisation	43.2
Workers union	4.5
Business association	15.9
Environmental NGO	9.1
Social NGO	9.1
Ministry	18.2

Organisation type	%
Public	60.4
Private	14.6
Third sector ¹⁸	8.3
Public/Private	8.3
Other	8.3

Organisation scale	%
European	2.1
National	63.8
Sub-national	34.0

Summary of organisations invited to participate in the survey on European tourism.

Country	Organisation type	Number
Austria	Tourism	7
	Environmental	1
	Worker	1
	Social	1
	Ministry	1
Belgium	Tourism	9
	Environmental	1
	Worker	0
Bulgaria	Tourism	5
	Environmental	2

¹⁸ The 'third sector' is a broad term used to cover a wide range of organisations that are neither in the public nor private sectors. They are often also referred to as the voluntary sector, non-governmental or non-profit organisations. Third sector organisations include charities, social enterprises, cooperatives voluntary or community organisations and other non-profit bodies.

	Social	1
	Ministry	1
Croatia	Tourism	7
	Environmental	3
	Social	1
	Ministry	1
Cyprus	Tourism	3
	Environmental	3
	Social	1
	Ministry	1
Czech Republic	Tourism	7
	Environmental	3
	Social	1
	Ministry	1
Denmark	Tourism	5
	Environmental	5
	Social	2
	Ministry	1
Estonia	Tourism	4
	Environmental	1
	Social	1
	Ministry	1
Finland	Tourism	5
	Environmental	2
	Social	1
	Ministry	1
France	Tourism	10
	Environmental	2
	Social	1
	Ministry	1
Germany	Tourism	9
	Environmental	2
	Social	3
	Ministry	1
Greece	Tourism	6
	Environmental	3
Hungary	Tourism	4
	Environmental	2
	Social	2

	Ministry	1
Ireland	Tourism	6
	Environmental	1
	Social	1
	Ministry	1
Italy	Tourism	7
	Environmental	3
	Social	2
	Ministry	1
Latvia	Tourism	4
	Environmental	4
	Social	1
	Ministry	1
Lithuania	Tourism	4
	Environmental	1
	Social	1
Luxembourg	Tourism	2
	Environmental	1
	Worker	1
	Social	1
	Ministry	1
Malta	Tourism	4
	Environmental	2
	Worker	1
	Social	1
	Ministry	1
Netherlands	Tourism	6
	Environmental	4
	Worker	1
	Social	1
	Ministry	1
Norway	Tourism	3
	Ministry	1
Poland	Tourism	6
	Environmental	1
	Social	2
Portugal	Tourism	6
	Environmental	2
	Social	1

Romania	Tourism	4
	Environmental	2
	Social	1
	Ministry	1
Slovakia	Tourism	4
	Environmental	1
	Social	1
Slovenia	Tourism	10
	Environmental	3
	Worker	1
	Social	2
	Ministry	1
Spain	Tourism	23
	Environmental	1
Sweden	Tourism	26
	Environmental	1
	Social	1
	Ministry	1
United Kingdom	Tourism	10
	Environmental	1
	Worker	2
	Ministry	1

ANNEX IV: STAKEHOLDER SURVEY

Q1. Please list 5 words that you think best describe the European tourism industry at present?

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

Q2. Could you please write a sentence that summarises your vision of how to develop European tourism over the next 5 years.

Q3. In your opinion, what are the five **most important topics in European tourism management** (i.e. trends)? Please rank your top 5, 1 being the most important and 5 the least.

- The uneven distribution of visitors causing both under and overtourism in destinations.
- The expected growth of visitors' demand.
- The growth of long-haul tourism (both inbound and outbound).
- The growth of new travel mobilities and potential traffic congestion.
- The growth of unsustainable and irresponsible tourism and the impacts on local residents.
- The adoption of sustainable growth policies and practices by both private and public sectors.
- The effectiveness of Quality, Responsibility and Sustainability labelling systems.
- The proliferation of new business models.
- The needs of new skills and competences in the management of tourism.
- The introduction of enabling technologies (i.e. artificial intelligence, Internet of Things, virtual/augmented reality, virtual consumption, etc.).
- The impacts of the Sharing and Circular Economy on tourism development and management.
- The growth of new emerging destinations, which might increase competition and pressure on lower prices.
- The impacts of global warming and climate change, including extreme weather events, threat to natural areas and decrease biodiversity.
- Other

Q4. In your opinion, what of the topics below should be given **preference in European tourism policy making** (i.e. challenges)? Please rank your top 5, 1 being the most important and 5 the least.

- The uneven distribution of visitors causing both under and overtourism in destinations
- The expected growth of visitors' demand.
- The growth of long-haul tourism (both inbound and outbound).

- The growth of new travel mobilities and potential traffic congestion.
- The growth of unsustainable and irresponsible tourism and the impacts on local residents.
- The adoption of sustainable growth policies and practices by both private and public sectors.
- The effectiveness of Quality, Responsibility and Sustainability labelling systems.
- The proliferation of new business models.
- The needs of new skills and competences in the management of tourism.
- The introduction of enabling technologies (i.e. artificial intelligence, Internet of Things, virtual/augmented reality, virtual consumption, etc.).
- The impacts of the Sharing and Circular Economy on tourism development and management.
- The growth of new emerging destinations, which might increase competition and pressure on lower prices.
- The impacts of global warming and climate change, including extreme weather events, threat to natural areas and decrease biodiversity.
- Other

Q5. How well do you think the European tourism industry is prepared for these challenges?

- Extremely well prepared.
- Very well, beginning to adapt.
- Moderately well, some countries need to adapt quickly to meet these.
- Slightly well, some sectors (e.g. accommodation, transport) will need to adapt further.
- Not well at all.

Q6. In your opinion, what new **opportunities will emerge for the sustainable development of the European tourism sector** over the next 5-10 years? Please rank your top 5, 1 being the most important and 5 the least.

- Innovative tourism governance to tackle the uneven distribution of visitors (under and overtourism) in destinations.
- The expected growth of visitors' demand.
- The growth of long-haul tourism (i.e. China travel to Europe).
- The growth of new travel mobilities.
- Contemporary tourism governance and policy to push sustainable and responsible tourism and effective dialogue between local residents and visitors.
- The adoption of sustainable growth policies and practices by both private and public sectors.
- The effectiveness of Quality, Responsibility and Sustainability labelling systems.
- The proliferation of new business models.
- The needs of new skills and competences in the management of tourism.

- The introduction of enabling technologies (i.e. artificial intelligence, Internet of Things, virtual/augmented reality, virtual consumption, etc.).
- Positive impacts through the Sharing and Circular Economy on tourism development and management.
- Increase civil awareness, new technologies and policies to cope with global warming and climate change.
- Increase specialisation and new markets (i.e. wellness tourism, eco-responsible tourism, community led (bottom up) tourism, staycation/domestic tourism, older/retired market, etc.).
- Other

Q7. How well do you think the European tourism industry is prepared for these opportunities?

- Extremely well prepared.
- Very well, beginning to adapt.
- Moderately well, some countries need to adapt quickly to meet these.
- Slightly well, some sectors (e.g. accommodation, transport) will need to adapt further.
- Not well at all.

Q8. Do you wish to comment further or clarify any of your responses on this page?

Q9. How effective do you think EU policies are in achieving the aims of boosting tourism growth, competitiveness and sustainability?

	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective at all
Growth	☐	☐	☐	☐	☐
Competitiveness	☐	☐	☐	☐	☐
Sustainability	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Q10. How effective have EU actions been in supporting tourism development?

	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective at all
Specific calls for projects etc.	☐	☐	☐	☐	☐

Europe Wide initiatives (EDEN, etc.)	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Q11. How do you think the EU will need to change to support the tourism industry in meeting the future challenges and opportunities?

Q12. How necessary do you think it should be to introduce 'tourism' in the EU policies/structures?

	Extremely important (1)	Very important (2)	Moderately important (3)	Slightly important (4)	Not at all important (5)
A specific budget	☐	☐	☐	☐	☐
A specific DG	☐	☐	☐	☐	☐
Specific European Directives	☐	☐	☐	☐	☐
Specific European Regulations	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Q13. Overall, do you think that the European Union should:

- Do more
- Do less
- Do the same
- Be more targeted
- Other

Q14. What type of organisation do you represent?

- Tourism Organisation
- Workers Union
- Business Association
- Environmental NGO
- Social NGO
- Ministry

Q15. What is your role or position?

Q16. Is your organisation

- Public?
- Private?
- Third sector?
- Other?

Q17. Is your organisation

- Global?
- European?
- National?
- Sub-National?

Q18. In which country are you based?

Q19. If you are interested in receiving notification of the publication of this study, please enter your email address below.

ANNEX V: EUROPEAN PARLIAMENT PUBLICATIONS RELATED TO TOURISM

Title	Type	Date Published	Link
Research for TRAN Committee - EU funding of transport projects	Study	15/07/2019	http://www.europarl.europa.eu/RegData/etudes/STUD/2019/629199/IPOL_STU(2019)629199_EN.pdf
Rail passengers' rights and obligations in the EU	Briefing	27/05/2019	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/621909/EPRS_BRI(2018)621909_EN.pdf
Safeguarding competition in air transport	Briefing	20/05/2019	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/608689/EPRS_BRI(2017)608689_EN.pdf
Revision of the Community Code on Visas	Briefing	12/04/2019	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/625129/EPRS_BRI(2018)625129_EN.pdf
Tourism	Fact sheet	01/04/2019	https://www.europarl.europa.eu/factsheets/en/sheet/126/tourism
Research for TRAN Committee: Transport and tourism in Belgium, France and the Netherlands	Briefing	29/11/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/629181/IPOL_BRI(2018)629181_EN.pdf
Research for TRAN Committee - Modal shift in European transport: a way forward	Study	23/11/2018	http://www.europarl.europa.eu/RegData/etudes/STUD/2018/629182/IPOL_STU(2018)629182_EN.pdf
European Travel Information and Authorisation System (ETIAS)	Briefing	18/10/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/599298/EPRS_BRI(2017)599298_EN.pdf
Research for TRAN Committee - Overtourism: impact and possible policy responses	Study	15/10/2018	http://www.europarl.europa.eu/RegData/etudes/STUD/2018/629184/IPOL_STU(2018)629184_EN.pdf

Digital tourism in the European Union	Briefing	28/09/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/628236/EPRS_BRI(2018)628236_EN.pdf
Research for TRAN Committee - BREXIT: transport and tourism - the consequences of a no-deal scenario	Study	26/09/2018	http://www.europarl.europa.eu/RegData/etudes/STUD/2018/617499/IPOL_STU(2018)617499_EN.pdf
Research for TRAN Committee - Transport and Tourism in Poland	Briefing	14/09/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/617496/IPOL_BRI(2018)617496_EN.pdf
The external dimension of EU tourism policy	Briefing	03/07/2018	http://www.europarl.europa.eu/RegData/etudes/ATAG/2018/625103/EPRS_ATA(2018)625103_EN.pdf
Research for TRAN Committee - Transport and tourism for persons with disabilities and persons with reduced mobility	Study	08/05/2018	http://www.europarl.europa.eu/RegData/etudes/STUD/2018/617465/IPOL_STU(2018)617465_EN.pdf
Revision of the visa code	Briefing	27/04/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/615671/EPRS_BRI(2018)615671_EN.pdf
Research for TRAN Committee - Transport and Tourism in Greece	Briefing	16/04/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/617469/IPOL_BRI(2018)617469_EN.pdf
Transport and Tourism in Ireland	Briefing	15/03/2018	http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/617463/IPOL_BRI(2018)617463_EN.pdf
Research for TRAN Committee - European Tourism Labelling	Study	07/03/2018	http://www.europarl.europa.eu/RegData/etudes/STUD/2018/617461/IPOL_STU(2018)617461_EN.pdf
Registration of persons on board passenger ships	Briefing	27/09/2017	http://www.europarl.europa.eu/RegData/etudes/ATAG/2017/608708/EPRS_ATA(2017)608708_EN.pdf

Research for TRAN Committee - Transport and Tourism in Bulgaria	Briefing	26/09/2017	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/601993/IPOL_BRI(2017)601993_EN.pdf
Research for TRAN Committee - Decarbonisation of EU transport	Study	05/09/2017	http://www.europarl.europa.eu/RegData/etudes/STUD/2017/601989/IPOL_STU(2017)601989_EN.pdf
Research for TRAN Committee - Transport and Tourism in Sweden	Briefing	28/07/2017	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/601987/IPOL_BRI(2017)601987_EN.pdf
Sources of EU funding for tourism-related activities	Briefing	05/07/2017	http://www.europarl.europa.eu/RegData/etudes/ATAG/2017/607296/EPRS_ATA(2017)607296_EN.pdf
Low-cost air carriers and tourism	Briefing	20/06/2017	http://www.europarl.europa.eu/RegData/etudes/ATAG/2017/607263/EPRS_ATA(2017)607263_EN.pdf
Research for TRAN Committee - Health tourism in the EU: a general investigation	Study	15/06/2017	http://www.europarl.europa.eu/RegData/etudes/STUD/2017/601985/IPOL_STU(2017)601985_EN.pdf
Major challenges for EU tourism and policy responses	Briefing	16/05/2017	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/603932/EPRS_BRI(2017)603932_EN.pdf
Research for TRAN Committee - Passenger night trains in Europe: the end of the line?	Study	05/05/2017	http://www.europarl.europa.eu/RegData/etudes/STUD/2017/601977/IPOL_STU(2017)601977_EN.pdf
Sustainable tourism: The environmental dimension	Briefing	13/03/2017	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/599327/EPRS_BRI(2017)599327_EN.pdf
Tourism and the sharing economy	Briefing	23/01/2017	http://www.europarl.europa.eu/RegData/etudes/BRIE/2017/595897/EPRS_BRI(2017)595897_EN.pdf

Research for TRAN Committee - From Responsible Best Practices to Sustainable Tourism Development	Study	15/03/2016	http://www.europarl.europa.eu/RegData/etudes/STUD/2015/573421/IPOL_STU(2015)573421_EN.pdf
Research for TRAN committee - The Digitisation of Tourism Enterprises	Study	16/11/2015	http://www.europarl.europa.eu/RegData/etudes/IDAN/2015/563420/IPOL_IDA(2015)563420_EN.pdf
Research for TRAN Committee - Tourism and the Sharing Economy: Challenges and Opportunities for the EU	Study	15/10/2015	http://www.europarl.europa.eu/RegData/etudes/STUD/2015/563411/IPOL_STU(2015)563411_EN.pdf

This study provides an overview of the current state of affairs in European tourism, considering the latest developments, identifying future challenges and emerging opportunities. It draws a number of conclusions and makes recommendations at an EU policy level that will support the sustainable development of the sector.
