

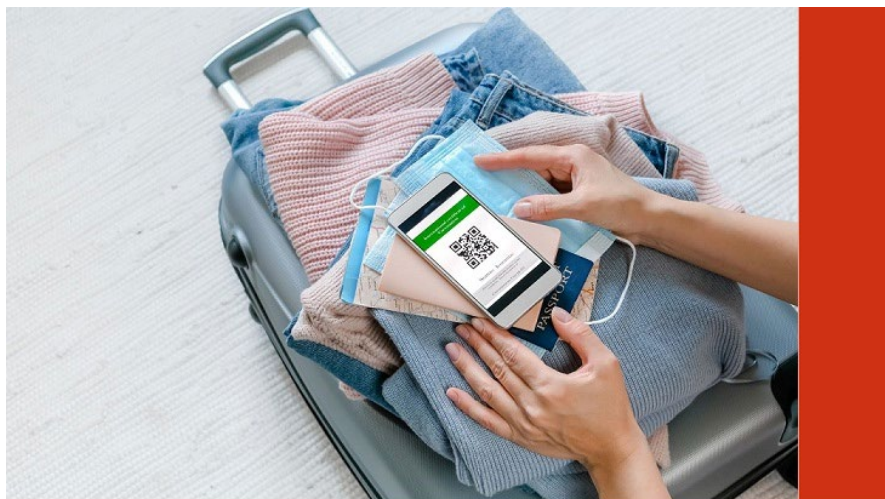
STUDY

Requested by the TRAN Committee



Relaunching transport and tourism in the EU after COVID-19

Part IV: Tourism sector



Transport and Tourism

Policy Department for Structural and Cohesion Policies
Directorate-General for Internal Policies
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Relaunching transport and tourism in the EU after COVID-19

Part IV: Tourism sector

Abstract

This thematic briefing provides the European Parliament's Committee on Transport and Tourism (TRAN) with an overview of the repercussions of the COVID-19 pandemic on the tourism sector, as well as policy recommendations to address the challenges emerging from the crisis.

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

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LIST OF ABBREVIATIONS

ADR	Average daily room rate
BN	Billion
CAGR	Compound annual growth rate
CEN	European Standardisation Organisation
CO₂	Carbon dioxide
DCC	EU Digital COVID Certificate
DMOs	Destination marketing organisations
dPLF	EU Digital Passenger Locator Form
EC	European Commission
ECDC	European Centre for Disease Prevention and Control
EMEA	Europe, the Middle East and Africa
EP	European Parliament
ESJS	European Skills and Jobs Survey
ETC	European Travel Commission
ETF	European Transport Workers' Federation
ETIS	European Tourism Indicators System
EU	European Union
GCT	Global city travel
GDP	Gross domestic product
HORECA	Hotel Restaurant Café
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
ICT	Information and communications technology
IHF	The Irish Hotels Federation
ISO	International Standardisation Organisation
MFF	Multiannual Financial Framework
MICE	Meetings, incentives, congresses, and events

NEST	Tourism Innovation Centre Portugal
NECSTour	European Regions for Competitive and Sustainable Tourism
NTB	National tourism board
NTO	National tourism organization
OECD	Organisation for Economic Co-operation and Development
PLF	Passenger locator form
Q	Quartal
QR	Quick Response code
RevPAR	Revenue per available room
RRF	Recovery and Resilience Facility
SDG	Sustainable Development Goals
SMEs	Small and medium-sized enterprises
T&T	Travel and Tourism
TFEU	Treaty on the Functioning of the European Union
UEFA	Union of European Football Associations
UN	United Nations
UNWTO	World Tourism Organization
USD	United States Dollar
WEF	World Economic Forum
WHO	World Health Organization
WTTC	World Travel & Tourism Council

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EXECUTIVE SUMMARY

KEY FINDINGS

- COVID-19 caused a large drop in international tourism arrivals and receipts in 2020, putting EU Member States' tourism industries in jeopardy in terms of income and job losses. Before international inbound tourism resumes, intra-European and domestic tourism represent the only chance to counterbalance and mitigate the financial losses.
- The European Travel Commission's (ETC) report (July 2021) outlined an optimistic scenario for the summer season 2021, expecting a significant tourism rebound in the third quarter of 2021. Yet, for a proper overview it is necessary to wait for official data for the summer season 2021.
- The spread of the more transmissible COVID-19 Delta variant has hindered the consistent use of the EU Digital COVID Certificate as national authorities of some EU Member States adjusted travel protocols accordingly.
- Travel and Tourism patterns and practices have changed due to the pandemic, showing a tendency towards closer destinations (domestic travel, tourism of proximity, short haul trips), longer holidays, last minute bookings, and increased concern about safety and hygiene.
- Digital and green transitions were emerging trends in the industry, prior to the pandemic. The pandemic accelerated the call for a green and digital transformation. The industry must continue to build digital skills, implement digital solutions, build sustainable infrastructure, and address sustainable travel patterns.

Due to the impact of the pandemic on tourism, the **overall contribution of tourism to total GDP in Europe halved** from 9.5% in 2019 to 4.9% in 2020. **International tourism arrivals in Europe dropped by 70% in 2020** in comparison to 2019. The **World Travel & Tourism Council (WTTC) reported that 3.6 million jobs were lost in Europe in 2020.**

In 2020 there was a significant shift towards domestic and regional travel. Domestic travel share of total travel in Europe increased from 55% in 2019 to 69% in 2020. The pandemic had an uneven impact on Member States and regions. **Countries with a large domestic market** like Germany, the Netherlands and Poland **were hit less severely** than smaller countries with limited domestic demand (e.g. Malta and Cyprus).

The pandemic had **different effects on each sub-sector of the industry.** While hotels were significantly hit, short-term rentals generally performed better. Data from the hotel industry shows in 2020 a significant drop in occupancy (54%) and in average daily rates (18%). Data from the food and beverage industry shows that turnover and employment dropped by 30% and 16% respectively. Business trip providers, event organisers as well as travel and tourism operators experienced the highest losses.

Even though the vaccine rollout is taking place promptly in Europe, **a significant recovery of the whole industry is not to be expected in 2021.** The UN World Tourism Organization (UNWTO) forecasts two possible scenarios for recovery in 2021 on a global level, ranging from 63% to 75% fewer

international tourist arrivals compared to 2019. However, there was some optimism in the [European Travel Commission](#) report published in July 2021, reporting better forecasts for Europe in 2021.

In the short and medium term, before the pandemic is over, **strengthening travellers' confidence remains the main challenge for the industry**. This depends upon:

- **the EU Digital COVID Certificate and clear and consistent travel protocols** at the EU level, which do not deter passengers with excessive administrative pressure;
- **harmonised hygiene and safety standards**, clearly and widely communicated and understandable by all categories of travellers;
- **the vaccine inoculation rate**: perception of safety plays an important role in boosting consumer confidence.

The introduction of the **EU Digital COVID Certificate** was welcomed by operators and stakeholders as a way of unifying travel protocols at the EU level and **facilitating the free movement of people**. **The requirements to obtain the EU Digital COVID Certificate are the same for all EU Member States** (vaccination, immunization, or a temporary pass after a negative PCR test). However, additional national measures may then be applied to restrict access to museums, archaeological sites, cultural, entertainment, sport venues, etc. This generates confusion among European travellers and residents.

Travel patterns have changed as a consequence of the health emergency, showing a tendency towards uncrowded and close-to-home destinations. More ethical, responsible and sustainable forms of tourism had been discussed at length and promoted prior to the pandemic, but the COVID-19 crisis has reinforced the need for tourism stakeholders to take bolder steps towards achieving carbon neutral tourism before 2050. A successful, **sustainable transition** will involve investments in sustainable infrastructure, employees' education and training, and greater **inclusion of residents in tourism practices**. Mobility is embodied in tourism and green mobility patterns will be crucial, also for the tourism transition, towards carbon neutrality.

To properly **address a digital transformation of the industry**, investments in digital infrastructure, tourism data strategy, implementation of emerging technologies and development of employees' digital skills and competences are essential.

The weak financial situation of tourism operators and related liquidity problems, mainly among small and medium-sized enterprises (SMEs), might **reduce the sector's capability to invest in the digital and green transition**. Without significant support from the EU's Multi-annual Financial Framework (MFF), coupled with NextGenerationEU (NGEU) and the Recovery and Resilience Facility (RRF), the green and digital transition will be hampered, and the long-term competitiveness of the EU tourism sector may be threatened.

Data from the 2021 summer season indicates that the transformation must take place in a timely fashion to avoid the risk of unsustainable overtourism¹. Despite the overall decrease in tourism activity, this phenomenon has already been detected in some localities (e.g., in Croatia, Montenegro, Italy, etc) during the summer season 2021.

¹ Overtourism occurs when certain places of interest are visited by excessive numbers of tourists, causing undesirable effects for the places visited. Even though we have recorded a significant drop in the number of international tourists in 2020, during the summer season of 2021, some destinations detected overtourism in July and August 2021 due to the high demand pressure in the short time span.

1. OVERVIEW OF THE IMPACT OF COVID-19 ON TOURISM

KEY FINDINGS

- The travel and tourism contribution to overall GDP in Europe dropped from a 9.5% share in 2019 to 4.9% in 2020.
- International tourism arrivals in Europe dropped by 70% in 2020 compared to 2019.
- The World Travel and Tourism Council (WTTC) reported that 3.6 million jobs in the EU have been lost since the outbreak of the pandemic. This figure would be much higher without job protection schemes implemented in most EU Member States.
- The tourism industry is experiencing a sharp reduction in the workforce, and finding workers is becoming one of the main challenges for stakeholders.
- In 2020, tourism losses were partially offset by domestic demand. Domestic travel shares in Europe increased from 55% in 2019 to 69% in 2020.
- The pandemic had an uneven impact on the different sub-sectors of the industry and on destinations. Cities have experienced higher losses than rural destinations. Short-term rentals have been performing better than hotels. Business tourism providers, event organisers as well as travel and tourism operators have experienced the highest losses.
- The United Nations World Tourism Organization (UNWTO) forecasts two possible scenarios for recovery in 2021 on a global level, ranging from a decrease of international tourist arrivals between 63% and 75% compared to 2019.
- The introduction of an EU Digital COVID Certificate and its extensions (i.e., national health passes), combined with the vaccine rollout, have helped to save the summer season 2021 although the different usage of the passes within each Member State has caused some confusion among travellers and residents.
- The initial forecasts are showing a recovery of the intra-European tourism sector and a tourism rebound in the third quarter of 2021.

1.1. Introduction

This chapter illustrates the effects of COVID-19 on the tourism industry. The first section sheds light on the impact of COVID-19 on passenger arrivals, travel and employment. In the second part of the chapter, the focus is on intra-EU tourism and tourism sub-sectors. The chapter closes on a recovery perspective for 2021.

1.2. Overall COVID-19 impact on the tourism sector in 2020

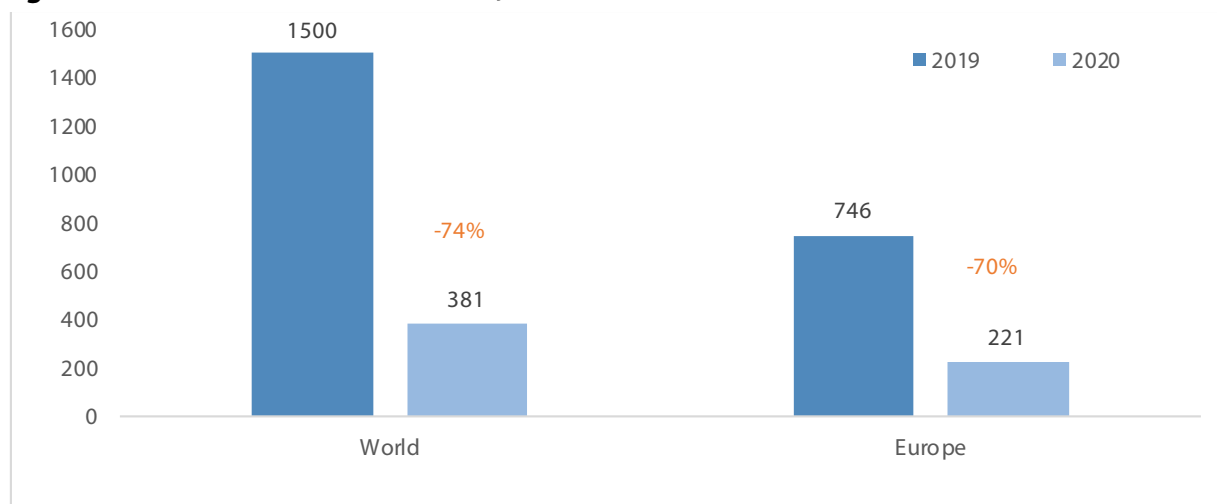
1.2.1. Impact on passengers' arrivals, travel and employment

The latest data from the [World Travel and Tourism Council \(2021\)](#) shows a **49.1% decline in total global travel and tourism GDP contributions**, equating to a downturn of almost 3.86 billion EUR compared to 2019. Such a large drop had a strong effect on employment. From 2014 to 2019,

[one in four new jobs](#) was related to travel and tourism, with over 330 million jobs in the industry roughly equating to one in ten jobs on a global scale. In 2020, that number was reduced to [272 million jobs](#).

[UNWTO](#) data for 2020 show a global drop of 74% in terms of international tourist arrivals, a loss of 1.1 billion international tourists compared to 2019 (Figure 1). The number of international tourism arrivals in 2020 was equal to the figures recorded in 1990.

Figure 1 - International tourist arrivals, million tourists



Source: [UNWTO \(2021\)](#).

In Europe², Travel and Tourism (T&T) contributions to GDP have fallen by 51%. **T&T contributions to overall GDP in Europe fell from a 9.5% share in 2019 to 4.9% in 2020.** International tourism arrivals in Europe in 2020 [dropped by 70%](#) in comparison to 2019. The highest reductions were recorded in Central/Eastern Europe (74.9%), followed by Northern Europe (73.4%) and South Mediterranean Europe (72.4%), while results in Western Europe were less severe (56.2%) ([UNWTO, 2021](#)). At the same time, in Europe, the domestic travel share of total travel increased from [55% in 2019 to 69% in 2020](#).

[WTTC](#) data from June 2021 report **that employment in tourism fell by 9.3%, corresponding to 3.6 million lost jobs in Europe**, a loss which could have been far worse if governments across Europe had not supported employees and introduced job retention schemes to save millions of jobs under threat.

As stated by the [OECD](#), women, young people, rural communities, and local people living on tourism-related activities are likely to have been affected the most. Job losses among seasonal and part-time workers are expected to have been severe.

The UNWTO [report from January to May 2021](#) painted a grim scenario for the industry. As most European countries had restrictions on mobility due to the second wave of the pandemic, the **drop in international arrivals from January to May 2021** amounted to **85%** compared to 2019.

Recent data from the [European Travel Commission](#) were more optimistic and outlined a prospect for recovery after the summer season 2021 at an unexpectedly faster pace. Vaccine rollout has increased travel confidence not just for the Europeans but also for tourists coming from the U.S. at the

² European countries covered by T&T data include: Austria, Belgium, Bosnia Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Montenegro, Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom.

beginning of the summer 2021. Nevertheless, the threat of the recent Delta variant has hindered a steady recovery as many EU countries had to put into force travel protocols which limited the benefits of the adoption of the EU Digital COVID Certificate, adding more requirements to be followed in the destination. Travellers coming from third countries may be subject to differing requirements and protocols across Member States. Reaching significant vaccination rates amongst the adult population by autumn 2021 may help travel to resume and the tourism industry to recover (as discussed in chapter 2.2. Expectations, attitudes, and traveller behaviour: surveys overview).

However, the lack of uniformity of protocols and the different applications of “health passes” (as extensions of the EU Digital COVID Certificate) within EU Member States have generated uncertainty, especially with regards to unvaccinated children and teenagers.

Furthermore, tourism businesses, [primarily hoteliers](#), were experiencing a workforce shortage during the summer season of 2021. Finding workers was a challenge for many tourism businesses for two reasons: 1) the summer season was picking up quickly, and it was better than expected in many destinations; 2) tourism businesses were losing employees during the lockdown despite the governments' job protection schemas. Workforce shortage and brain drain will be one of the largest challenges for the industry in the post-COVID recovery period.

1.2.2. Impact on the Member States and intra-EU tourism

Year 2020 ended with a significant fall ([between 51% and 85%](#)) in tourism arrivals in all Member States. Countries with a high GDP share of tourism and significantly dependent on international inbound tourism³ experienced the highest losses. For instance, in 2020, Cyprus reported a drop of [84% for international arrivals](#), while Spain reported a drop of [77.3% for international arrivals](#). Austria recorded one of the smallest drops in international overnights (41%), followed by Italy (54.2%) and Germany (54.7%).

Due to the severe restrictions during the second wave of the pandemic, [data](#) available for the first quarter of 2021 (Q1 2021) shows a significant drop in international tourism arrivals and overnights in most of the EU Member States (see annex 1). The drop in the number of international tourist arrivals varies among the Member States. For instance, Croatia recorded growth in the number of tourist arrivals of 23% in Q2 2021 in comparison to Q2 2020 while Austria and Spain were respectively recording a drop of 97% and 82.6% in Q2 2021 in comparison to Q2 2020. According to the ETC report from July 2021, the expectations for the summer season of 2021 were relatively optimistic, and most of the Member States had a significant growth of tourists compared to 2020. Unfortunately, official numbers were not available prior to this publication.

The [WTTC](#) also reported a significant decline in tourism and travel contribution to the Member States' overall GDP. The main tourism markets in the EU – France, Italy, Germany and Spain – recorded major losses. The contribution of tourism and travel (T&T) to GDP in Italy, for example, dropped from 13.1% in 2019 to 7% in 2020 (losses of 113 billion EUR). T&T's contribution to Italian GDP in 2020 was 109 billion EUR, and 80% of the 2020 expenditure was attributed to domestic travel.

Similarly, [WTTC \(2021\)](#) data for France showed that the T&T share of GDP fell from 8.5% in 2019 to 4.7% in 2020. The losses in absolute terms were 96 billion EUR in 2020 (own calculation from USD to EUR). Total T&T contribution to GDP in 2020 was 101 billion EUR. Most of the expenditure (67%) depended on domestic tourists.

³ [Inbound tourism](#): visits to a country by visitors who are not residents of that country.

Large losses were also recorded in Spain where the T&T share in GDP dropped from 14.1% in 2019 to 5.9% in 2020 (contribution of T&T to GDP dropped by 63%). Total losses from 2019 to 2020 amounted to 105 billion EUR. Total T&T contribution to GDP in 2020 was 62 billion EUR, and 63% of that contribution was due to domestic tourism demand ([WTTC, 2021](#)).

The T&T share was also high in Germany before the pandemic, accounting for 9.8% of GDP in 2019. This share dropped to 5.5% of GDP in 2020. Total losses in 2020 in comparison to 2019 were 153 billion EUR. Total T&T contribution to GDP was [172 billion EUR](#), and 88% of this figure was due to domestic demand.

In [2020, domestic and short haul travel \(i.e. destinations close to home or, in aviation terms, involving a flight of 30 minutes up to 3 hours\) drove](#) demand in tourism activity in most of the EU Member States, specifically over the summer season 2020. In countries with larger domestic market potential, such as [Germany or Poland](#), better results were achieved compared to those countries with lower domestic market capacity and high dependence on international inbound demand.

Data from [2021 reported by the ETC \(July 2021\) show](#) that intra-European travel is recovering, and [Tourism Economics](#) forecasted that intra-European travel will account for 83% of European inbound arrivals compared to 77% in 2019.

In May 2021, Croatia outperformed expectations, [recording a 23% growth](#) in comparison to 2020. Those results were achieved by a targeted vaccination programme prioritising tourism workers, a faster reopening of the industry, the introduction of numerous flights between the USA and Croatia, and extensive promotional campaigns by the Croatia National Tourism Board.

During July and August 2021 about [23 million Italians](#) spent their vacation within their own country, reaching an unprecedented result. In 2020, the number of Italians who spent the summer in Italy was 17 million and in 2019, before the pandemic outbreak, it was 18 million. According to the Italian Confederation of Craft Trades and Small and Medium-Sized Enterprises (CNA), the rise in domestic demand was due to the introduction of the “green pass” (on 6th August 2021) which allowed free movement and fewer restrictions while travelling by train, boat, aviation, or bus. Hotels recorded 15 million arrivals while other types of accommodation (e.g., campsites, B&B, etc.) recorded 8 million arrivals.

On the other hand, Austria recorded the highest decline in tourism arrivals in the first four months of 2021, with a [97% decline](#) due to the lost winter season in 2021.

These examples illustrate the fact that the pandemic is having highly differentiated effects on EU Member States’ tourism industries.

1.2.3. Impact on tourism sub-sectors

The pandemic also resulted in different effects across the various sub-sectors of the tourism industry. Given the ongoing situation, a complete analysis will only be possible once actual data is retrieved and reviewed. However, current analyses of the pandemic impact on accommodation, hospitality and travel, and tourism operators are summarised in the following sections.

1.2.3.1. Accommodation

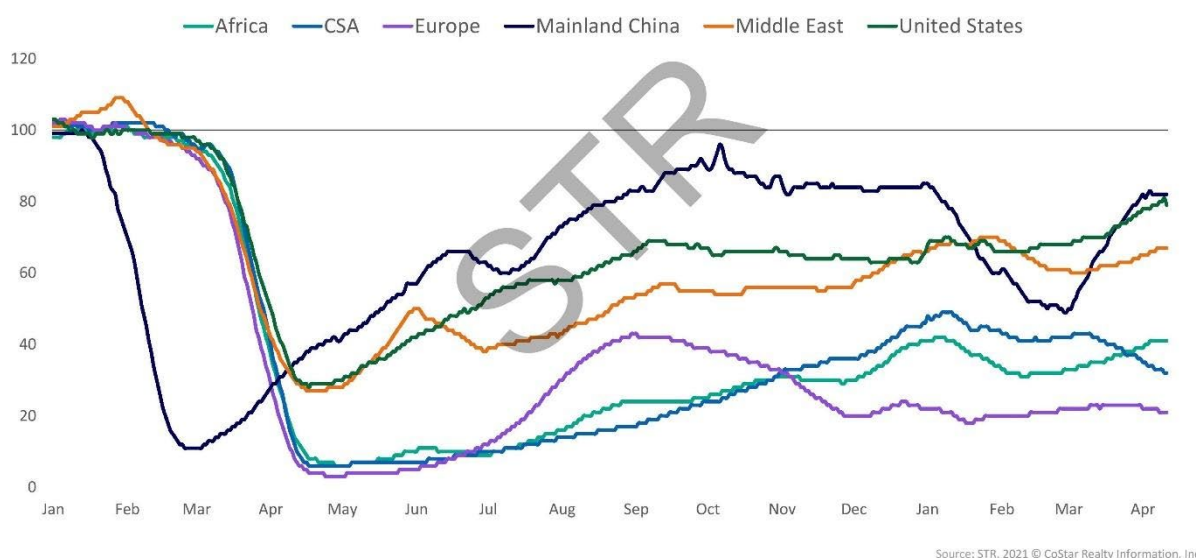
Hotel operators in all Member States have recorded significantly lower occupancy rates and revenues per available room rates. In 2020, average occupancy rates in hotels in Europe were [33.1%, meaning that they were 54.2% lower than the average occupancy rate in 2019](#). The pandemic forced hotels in Europe to reduce prices in order to stimulate bookings. The Average Daily Room Rate (ADR)

was 93.34 EUR in 2020, 18.2% lower than in 2019. Due to the drop in occupancy and prices, hotels recorded a significant drop in revenues per available room, 62.5% in 2020 in comparison to 2019. Revenue per available room in 2020 was the lowest on record amounting to 30.86 EUR (STR, 2021).

Due to the second wave of the pandemic, hotels in Europe continued to perform poorly in Q1 2021. From January to March 2021, occupancy fell by 52%, and revenues per available room were down 65% compared to 2020.

Hotels in Europe are showing a slower paced recovery in comparison to other countries (Figure 2). Occupancy rates were lowest (less than 10%) during the first lockdown, from mid-March 2020 to mid-June 2020. They showed signs of recovery during the summer season 2020 (July-September 2020) but dropped again throughout the second wave of the pandemic and were still at a low level (approximately 20%) in spring 2021. Stronger recovery in the hotel industry was recorded in other world regions, specifically the Middle East, China, and the US.

Figure 2 - Hotels average occupancy rates 2020-2021⁴



Source: STR, 2021 © CoStar Realty Information, Inc.

Source: [STR \(2021\)](#).

Revenue performance for hotels in Europe also differs across Member States. Annex 2 shows occupancy rates in hotels, average daily rates, revenues per available room, and percentage change year-to-date (January-May). For instance, Austria has experienced a reduction in revenues per available room of 71%, between January and May 2021 in comparison to 2020, while hotels in Croatia were reporting an increase in revenues per available room of 30%.

Eurostat data on the number of employees in the accommodation sector show a significant drop in the number of employees. In the last quarter (Q4) of 2019, the accommodation sector in the EU27 was employing 2.3 million employees. This figure was 26% lower in the last quarter (Q4) of 2020 when 1.7 million employees were recorded. Furthermore, data on the turnover of the accommodation sector in 2020 in the 27 Member States [dropped by 53% compared to 2019](#).

City hotels in Europe recorded significantly larger losses than hotels in rural areas ([STR, 2021](#)). Occupancy rates in major EU cities [Paris \(9%\), Madrid \(16%\), Rome \(9%\) and Berlin \(11%\)](#) in Q1 2021

⁴ CSA – Central South Asia.

were at their lowest levels. However, [occupancy rates in Q1 2021](#) in cities in other parts of the world showed a significant growth: Singapore 63%; Hong Kong 44%; Beijing 34%; Auckland 59%; Los Angeles 47%; New York 30%.

Tourism Economics (2021) forecasts for city tourism recovery in 2021 are not optimistic. According to [Tourism Economics 2021 Global City Travel \(GCT\)](#), worldwide international arrivals to cities are expected to be 57% below 2019 levels in 2021 while domestic arrivals are expected to remain 10% below 2019 levels.

Yet, there is some optimism in the European hospitality market. In April 2021 [STR reported](#) that Europe was the only world region showing increased hotel construction activity in Q1 2021 compared to the same period in 2020. [According to STR data, 26.9% more hotel rooms are under construction and 23.7% more hotel rooms will be opened within Q1 2021 compared to Q1 2020.](#) Intense building activity indicates that investors share optimism in the recovery of the hotel and tourism industry. Throughout the pandemic, investors used the 'occupancy lost time' to rebuild, build, and refurbish facilities.

According to the STR [and AirDNA \(2020\) \(data from Airbnb\)](#) reports, hotels were experiencing a much steeper decline in demand compared to short-term rentals in 2020. Data show that the short-term rental sector was almost nearing 2019 levels in revenue per available room (RevPAR) in 2020.

1.2.3.2. Hospitality

The hospitality sector comprises a broad spectrum of tourism related domains and sectors, including food and beverage facilities, culture and leisure activities, sports and corporate tourism (known collectively as meetings, incentives, congresses and events, or MICE).

[The Hotel-Restaurant-Café \(HORECA\) sub-sector was seriously](#) affected by the pandemic since many hotels, bars and restaurants were required to remain closed during the first and second waves. The impact on the sub-sector was harder during the first wave of the pandemic. During the [second wave](#), many operators adapted and adjusted their businesses to the new demands (e.g., offering home delivery or take away services). This trend is expected to be carried forward in terms of consumers' habits; McKinsey's consumer sentiment survey in 2020 showed that [approximately 35 to 55%](#) of consumers in Europe intend to use more home meal delivery services in the future. Data from [OpenTable](#) recorded that as of December 2020 [28% of the worldwide restaurants](#) closed due to the pandemic.

Eurostat data on yearly turnover in food and beverage services in the 27 Member States shows a [drop in revenues by 30% in 2020 compared to 2019](#). Turnover in [Q1 of 2021 was significantly lower, 60% lower than the turnover in Q1 2019](#). The number of EU27 employees in food and beverage services in [Q4 2020 was 16% lower than the number of employees in Q4 2019](#).

Culture, creative industries, and tourism are highly interdependent industries. In 2019 the culture and creative economy generated [4.4% of the EU GDP and represented almost 4% of total employment](#). In 2020, [31% of the revenues in culture and creative industries were lost](#) due to the pandemic. Sub-sectors dependent on tourism, such as performing arts ([drop of 90%](#)) and music events ([drop of 76%](#)), were the most affected. A study of 600 museums from 48 countries – the majority of which being in Europe – showed that most museums were closed during the health emergency. Even when they re-opened to the public, [half of the European museums reported a drop in visitors between 25% and 75%](#).

Business travel represents a very important part of European tourism, with the continent accounting for [50% of global business arrivals \(ETC, 2020\)](#). According to Tourism Economics (2021), global domestic

business travel spending dropped substantially in 2020 compared to 2019, while international business spending dropped even more over the same period. European cities are important host destinations for MICE events and have been particularly affected by travel restrictions and suspension of trade fairs, business events, corporate events, etc. According to the forecasts, international business travel will be one of the last segments to recover. Tourism Economics forecasted recovery in 2024.

There is no unified answer on how teleconferencing, virtual meeting, hybrid and online events will change the business travel sector in future. The [STR study from 2021](#) shows that 51% of business travellers are likely to travel the same, or even more, after the pandemic, while the remaining 49% think they will travel less or are unsure. [Research conducted in July 2020 by SAP Concur](#) reports that 52% of business travellers expect their companies to experience negative outcomes (e.g., reduced number of deals or contracts) due to travel restrictions caused by COVID-19. Overall, we may expect that many number of large and mid-scale events will remain online or offer hybrid forms of participation. There is a higher probability that in-person business meetings will recover at a faster pace.

1.2.3.3. Tourism and Travel Agencies

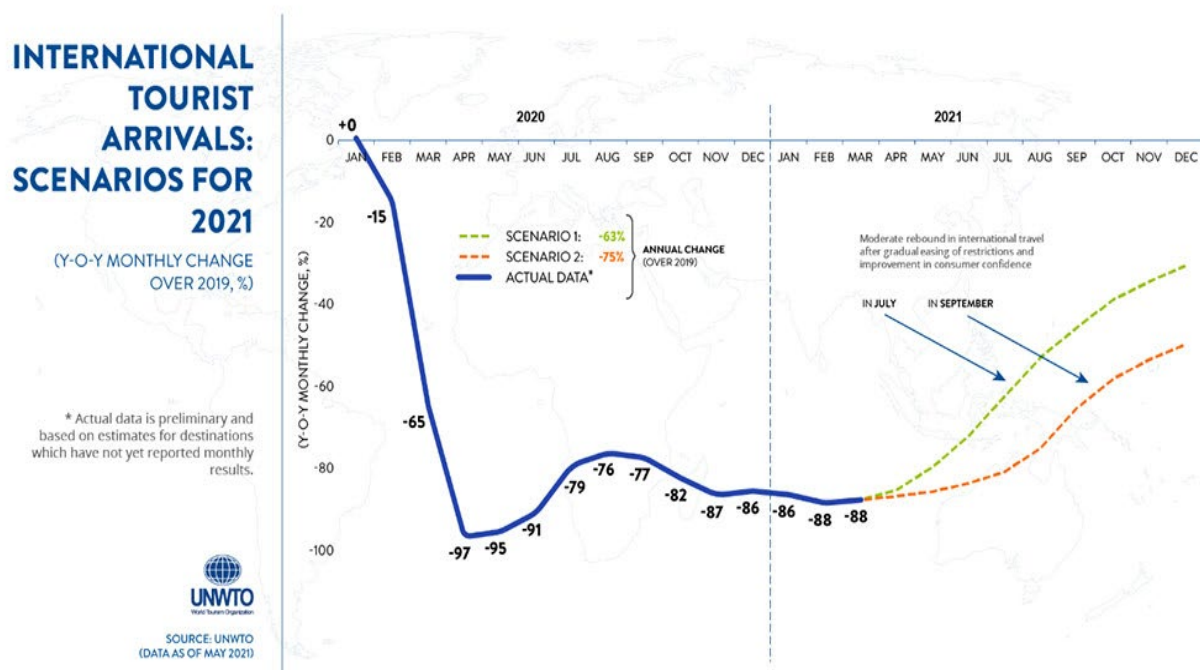
Eurostat data show that **travel agencies, tour operators, and other related operators** recorded significant losses in their economic activity in 2020 within the 27 Member States. The drop in overall turnover was [71% in 2020 in comparison to 2019](#). Furthermore, turnover in Q1 2021 [was 83% lower than the turnover in Q1 2019](#). The significant drop in revenues has had an impact on the number of employees in the sub-sector. Eurostat reported a [63% drop in employees](#) from 2.7 million workers in Q4 2019 to 1 million workers in Q4 2020.

The pandemic has also affected online travel agents (i.e., Booking.com, Expedia, TripAdvisor, etc.), although their forecasts for recovery are positive. They expect a global growth in revenues at a compound annual growth rate (CAGR) [of 29.9% in 2021 compared to 2020](#). Furthermore, they expect [double-digit 10% CAGR until 2025](#).

1.3. Forecasts for 2021

As we progress into the second half of 2021, signs of mild recovery have been detected. To date, [four vaccines have been approved by EU regulators](#), and as vaccine inoculation improves across Member States, many tourism stakeholders are eagerly anticipating a return to pre-pandemic levels of activity.

In terms of global tourism recovery in [2021, UNWTO](#) forecasts two scenarios (Figure 3). The first scenario predicted a rebound in July 2021 and – under this scenario – by the end of 2021 there will be 63% fewer international tourist arrivals than in 2019. In the second (less optimistic) scenario, the rebound is foreseen in September 2021, and the drop in the number of international tourist arrivals in 2021 will be 75% compared to 2019 ([UNWTO, 2021](#)).

Figure 3 - UNWTO forecast for 2021

Source: [Barometer](#) | UNWTO

The European Travel Commission's report (2021) estimated that we might expect a gradual recovery in 2021, relying mostly on domestic and intra-national travel. This study predicts that 2019 levels will not be reached – optimistically – until 2023, yet full recovery may take longer.

Tourism Economics (2021) forecasted European tourism recovery in 2021 with two possible scenarios. In the pessimistic scenario of limited cross border travel in 2021, international tourism arrivals could be 77% lower than in 2019 (with a higher drop than in 2020). Under the second and more realistic scenario, the drop in international tourism arrivals in 2021 will be 46% compared to 2019. Their predictions for 2022 are slightly more optimistic with the prospect of further recovery of international travel. The expected 2022 drop in international tourist arrivals under the baseline scenario is 24% compared to 2019, and under the pessimistic scenario, the drop is 39% compared to 2019.

Tourism Economics (2021) forecasted that domestic tourism will be leading the recovery in Europe. Under their realistic scenario, domestic travel and short haul travel will continue to account for an important share of tourism demand.

These forecasts are also indicating a potentially uneven recovery. Destinations with [large domestic markets](#) such as Germany or Poland will be less exposed and [should see a faster recovery](#). On the contrary, destinations dependent on international demand, such as Cyprus, Malta, Spain, Portugal or Greece would experience greater losses since they have less opportunity to compensate for decreased international inbound demand. For example, in 2019, the percentage of foreign tourists in Germany was 20% while in the same year in Italy, it was around 50%. Furthermore, city destinations and tourism operators in those destinations depending on business travel will be recovering at a slower pace. Tourism Economics [forecasts](#) a recovery of international business tourism by 2024, while recovery of domestic business tourism is expected in 2023.

2. HOW TO REBUILD TRAVELLERS' CONFIDENCE IN TOURISM

KEY FINDINGS

- Hygiene protocols have become an essential factor for travellers. Travellers' perception of their own safety when travelling and at their destination plays a crucial role in boosting consumer confidence and restarting travel.
- Vaccine roll-out is essential for resuming travel confidence. Most survey respondents mentioned that high rates of COVID-19 inoculation among the wider population would make them feel safer.
- The introduction of the EU Digital COVID Certificate aided by an efficient communication strategy can play a crucial role in encouraging people to travel again.
- The diversified application of the EU Digital COVID Certificate (via national health passes) within EU Member States has generated confusion among European citizens.
- Due to the prolonged health emergency, public attitudes towards travel have changed. Travellers have shown a higher interest in booking domestic holidays (or short haul travel), selecting uncrowded destinations and short-term trips, often close to home. The industry offer will therefore tend to adjust to demand while addressing new and sustainable travel patterns.

2.1. Introduction

Boosting travellers' confidence before the pandemic is over is essential to restore the Tourism and Travel industry. Vaccine roll-out, safety protocols, and the introduction of the EU Digital COVID Certificate play a significant role in encouraging travel. As of July 2021, The [European Travel Commission](#) forecasted a good summer season, confirmed by an upsurge of air bookings when travel restrictions were lifted, but also warned of the risk of the Delta variant hindering the recovery. The application of the EU Digital COVID Certificate was welcomed by tourism stakeholders, but as many countries introduced national "green passes" (as an extension of the EU Digital COVID Certificate), this created confusion among travellers.

Hygiene protocols have become an essential factor for travellers, whose perception of their own safety when travelling and at the destination plays a crucial role in restarting travel. One of the main [priorities](#) for tourism operators is undoubtedly to help customers overcome the perception of an infection risk while promoting a destination and providing services.

In the process of adapting to a 'new normal', people have changed their travel behaviour. Travellers are more willing to book domestic holidays, preferring remote destinations and short-term trips, often close to home. As the European Travel Commission by Tourism Economics [reports](#), "Consumer trends continue to revolve around travelling closer to home and "staycations", coupled with longer-term stays, short booking windows, travellers craving local experiences, "safety first" mindset while travelling, and the pursuit of nature and outdoor experiences, among others."

This chapter presents an analysis of the COVID-19 impact on tourists' perception. The first section sheds light on the impact of COVID-19 on expectations, attitudes, and traveller behaviour. In the second part of the chapter, the focus is on measures adopted to increase travellers' trust and ease their mobility, in particular the EU Digital COVID Certificate. The chapter closes with the presentation of current practices in rebuilding travellers' confidence across the different Member States.

2.2. Expectations, attitudes, and traveller behaviour: surveys overview

As highlighted by the thematic briefing on [Relaunching transport and tourism in the EU after COVID-19 - Part III: Aviation sector](#), research by [Allianz](#) pointed out that vaccine roll-out plays an important role in restoring traveller confidence; 67% of respondents stated that COVID-19 vaccines would have made them feel safer, 66% of respondents said that wearing masks on planes and airports was important to make them feel safer, and 59% of respondents considered it crucial to have blocked seats/limited capacity on planes and trains. Travellers' responses also highlighted the importance of advanced sanitizing efforts at airports and hotels (58%) and of the percentage of vaccinated people at the destination (47% of respondents said other people receiving a COVID-19 vaccine would make them feel safer to resume travelling). By the same token, 44% of the travellers surveyed asserted they would feel encouraged to travel if COVID-19 cases were declining in the destination. Additionally, travellers would feel safer if asked for proof of a negative COVID-19 test upon arrival at a destination ([41% of respondents](#)).

A Flash Eurobarometer [survey](#) showed that 75% of Europeans believed the vaccine was the only way to put an end to the pandemic, while 49% believed it was very important for them to resume travelling.

According to the 2021 Global Rescue Travel Survey, by a 2-to-1 margin, negative COVID-19 tests do not make travellers feel safer compared to getting a vaccine. 73% of respondents would feel safer during a trip if they had a COVID-19 vaccine compared to 36% of people who would feel safer if they had a negative PCR COVID-19 test result before reaching their destination. Travellers (69%) also want [other travellers to be vaccinated](#).

The [ETC quarterly report](#) 2021 indicated that the COVID-19 vaccine roll-out boosted travellers' confidence for more than [57% of respondents](#). This finding is in line with the willingness to book a trip again, as 54% of the respondents stated they would start travelling once vaccinated.

By reviewing these results, a systematic approach is needed to rebuild trust by tackling all points of the customer journey⁵. Travellers' perception of their own safety when travelling and at the destinations will play a pivotal role in restarting travel. As mentioned in the thematic briefing on [Relaunching transport and tourism in the EU after COVID-19 - Part III: Aviation sector](#), with the start of the vaccination, respondents feel hopeful and optimistic about [travelling](#) in 2021 (71% of respondents).

2.3. Measures adopted to increase travellers' trust

2.3.1. EU Digital COVID Certificate

The [EU Digital COVID Certificate](#), operating from 1st July 2021 is used as [a proof](#) that a person 1) has been vaccinated against COVID-19 2) has recovered from COVID-19 or 3) has a negative test result. The introduction of the EU Digital COVID Certificate was aimed at facilitating travelling among EU citizens and it was also recognized by Iceland, Liechtenstein, Norway, and Switzerland. The certificate is issued

⁵ A customer journey is an entire experience a customer has while communicating with a brand.

by national authorities or health centres and people holding it are exempted from quarantine and testing upon arrival in EU countries unless emergencies related to variants require more cautious protocols. The European Commission stated that they would mobilise at least [€100 million under the Emergency Support Instrument](#) for the purchase of tests for SARS-CoV-2 for EU Digital COVID certificates. The [EU Digital COVID Certificate](#) entered into application throughout the EU in July 2021 and currently all Member States are effectively connected to the EU gateway.

The technical backbone of the EU systems went live from 1st June 2021. The EU gateway [provides services for the verification of the security features contained in the QR codes of all certificates](#).

The [European Council confirmed](#) that EU countries must accept vaccination certificates issued in other Member States from 1st July 2021 onwards. The vaccines that are considered valid for the digital certificate are those authorized for use in the EU by the European Medicines Agency (EMA) — Pfizer-BioNTech, Moderna, AstraZeneca and Janssen. However, some EU Member States (Austria, Cyprus, Greece, Hungary, Iceland, Netherlands, Spain, Sweden, and Finland) additionally accept Sinopharm as a valid proof of immunity against COVID-19, while others do not. The certificate is free of charge, issued in the national language and in English, valid among EU countries and has a QR code (digital or on paper). Travellers show the scannable QR code on their phone or on paper before boarding or entering a country or to access venues where it is required (e.g., museums, concerts, restaurants, etc.). It is up to each Member State to decide how to communicate protocols for people who do not hold the certificate as the EU Digital COVID Certificate is not mandatory. The EU Commission has created a gateway where all the certificate signatures will be verified thus avoiding the need to reveal personal information. The aim of the certificate is to facilitate travel within EU countries, but it is not a precondition. Citizens without the certificate will be able to move, adhering to the protocols in force in each destination, in full respect of the right of free movement within EU Member States. [The Regulation](#) will be in force for 12 months. As of August 2021, some non-EU countries – Switzerland, Ukraine, Turkey, and North Macedonia – have also started accepting the [EU Digital COVID Certificate](#).

The EU Digital COVID Certificate represents an important instrument to harmonize travel protocols within Europe. Yet, in July 2021, travel protocols were not fully unified, specifically for children and teenagers. For instance, in July 2021, children under 13 years old, travelling with parents equipped with the EU Digital COVID Certificate, had free entry to Croatia, while in Iceland the age limit for children was 15.

It would be advisable to enforce communication regarding differentiated protocols for families. A family travelling across Europe with children needs to ask local authorities to arrange testing for the children (if not vaccinated or immune) or be required to follow the hosting country protocols (quarantine and testing). Different protocols and travel restrictions in force in each country may also generate some confusion and long queues at airports.

[The European Digital Passenger Locator Form \(dPLF\)](#) is used by public health authorities to collect data on passenger travel and personal information to facilitate contact tracing if a person is exposed to the virus. In September 2021, Slovenia, Italy and Malta demanded passengers to complete the dPLF before arrival. Other Member States use similar forms, for instance, Croatia has an [EnterCroatia](#) form, and Spain requires the [FCS form](#) available at the Spain Travel Health portal.

[As of September 2021, fourteen Member States have introduced a national health pass](#) as an extension of the EU Digital COVID Certificate. The national passes regulate access to venues, leisure activities, and facilities. For instance, [in Austria \(in July 2021\)](#) the green pass was necessary to enter restaurants, theatres, hotels, sports facilities and beauty centres, while [in Latvia](#) it was necessary for dining indoors and visiting gyms, cinemas, and theatres but not required for outdoor dining. [In Italy](#), from August

2021, the green pass is required to enter museums, cultural sites, indoor fairs, indoor restaurants and bars, indoor sport centres, cinemas, concerts, theme parks, sport events, but it is not necessary to enter hotels, shopping centres, and beauty centres. Additionally, from the 15th October 2021, the green pass will be mandatory for employees to enter any private or public work place. In [Portugal](#) you need a green pass to enter hotels, while in the [Netherlands](#) it is only required for large events. Another example is [France](#), where from August 2021 the health pass is necessary for accessing leisure and cultural events with 50 or more people and for visiting restaurants, outdoor terraces and shopping malls.

To avoid confusion, the harmonization of protocols in the use of EU passes would facilitate the provision of coordinated and properly communicated information.

Procedures to obtain certificates are mostly carried out via apps and websites, so one of the weaknesses that has emerged is in relation to members of the public who lack access to computers and smartphones. Individuals may therefore encounter difficulties unless properly supported or clearly informed about methods for obtaining paper versions. Moreover, the different names assigned to the national passes may generate confusion among travellers (i.e. [passe sanitaire](#) in France, [certificado Covid](#) in Spain, [Green Pass](#) in Slovenia, Italy, etc., [Grüner Impfpass](#) in Germany, etc.) along with the different usage of the pass in each country.

Confusion related to the use of green passes to access museums and archaeological sites may therefore hinder the recovery of the cultural and creative sectors unless improved communication is implemented together with more efficient certificate checking procedures. Travellers will only be encouraged to visit places of art and culture when they are able to access clear information. For example, [on the first day of the introduction](#) of the Italian green pass, on August 6th 2021, the Colosseum was put under significant pressure: the AGT (Associazione Guide Turistiche Abilitate) documented long queues waiting in the Roman heat to check green passes (of pre-booked and prepaid tickets).

The introduction of the EU Digital COVID Certificate shared by all European countries was tested in many surveys with the aim of verifying whether (and to what extent) citizens of different countries agreed upon the adoption of the “vaccine passport” and if and how the passport could facilitate a less-stressful travel experience, boost the appeal of safe foreign travel and increase the confidence of travellers.

The EU Digital COVID Certificate was perceived by some as the solution for safely resuming travel abroad, but others viewed it negatively because they perceived it as a violation of personal freedom to move or even a privacy violation. This sentiment resulted in demonstrations against its use, for example in France ([Reuters, 2021](#); [BBC News 2021](#); [RFI 2021](#)).

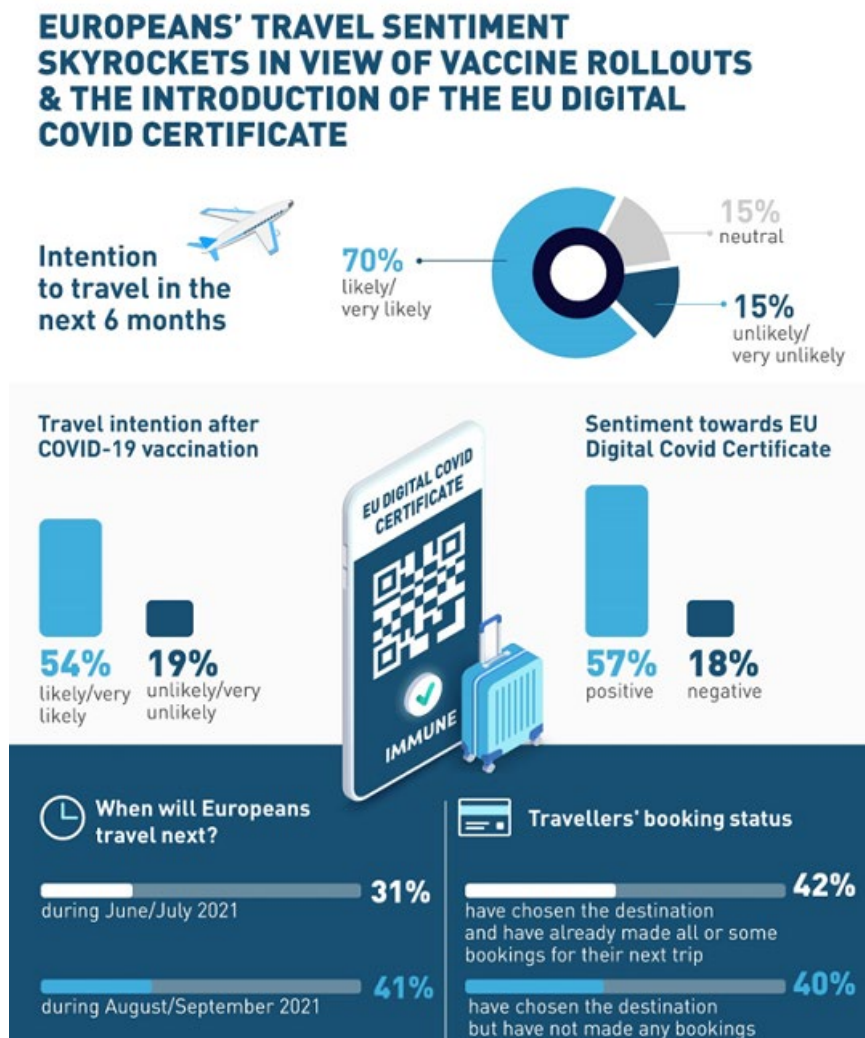
Yet, for most Europeans the vaccine is considered one of the crucial instruments to restore their confidence in travelling, and especially for travelling abroad. The Monitoring Sentiment for Domestic and Intra-European Travel’s [research](#) carried out in February 2021 found that 48% of all Europeans surveyed felt much more confident about planning trips in the following 6 months as a result of the vaccine roll-out; 31% had neutral feelings, while 21% of respondents were still very sceptical.

Results from a survey carried out in June 2021 by [the European Travel Commission](#) to evaluate Europeans’ travel sentiments in view of vaccine roll-outs and the introduction of EU Digital COVID Certificate, showed that 70% of respondents intended to travel within 6 months (50% eager to travel intra-Europe), 72% of respondents were going to travel between June and September 2021, while 16% were planning a holiday in autumn 2021. According to the survey, the interest in travelling amongst Europeans has risen. Some 57% of respondents stated they felt more confident about travelling thanks to vaccination (with 25% neutral and 18% not convinced). Two-thirds of Europeans were planning

to travel in the next 6 months (data collected in May 2021) (with 15% uncertain and 15% with no travel intention).

There was also a [disparity](#) between Italy, Germany, France and the UK on the acceptance of the “vaccine passport”. In March, France was the country with the lowest number of people in favour of adopting the “passe sanitaire”. In the figure below, 57% of the respondents showed positive feelings toward the EU Digital COVID Certificate. In addition, the majority of respondents stated they would likely or very likely travel after the COVID-19 vaccination, within the following 6 months, in particular in August/September 2021. Trends showed that the majority of travellers (42%) had chosen the destination and made all or some bookings for their next trip.

Figure 4 - Europeans’ travel sentiment



Source: [ETC Corporate \(2021\)](#).

2.3.2. European Tourism COVID-19 Safety Seal

The New European Tourism COVID-19 Safety Seal was developed by the European Standardisation Organisation (CEN) and put into force in May 2021 to outline a model for standardised health and safety protocols in the tourism services. The initiative, promoted by the Commission, was intended to complement "[CEN's endorsement of a safety protocol developed at the International Standardisation Organisation \(ISO\)](#)".



The initiative aimed to increase travellers' trust, improve safety protocols and harmonize them in tourism businesses. The seal represents a useful tool to promote the image of a European quality reputation. The harmonization of protocols ensured by a European Safety Seal may represent a valid [stimulus to travel in safety](#).

The use of the [Global Protocols and Stamp](#) will probably stay in force and continue to develop during the forthcoming months and years. The aim of quality stamps is to help customers and travellers regain trust in travel and enhance safety perceptions when booking and when visiting a destination. During the pandemic, many States introduced local quality seals and as for the EU Digital COVID Certificate, a coordinated approach will be needed. As observed in destinations hit by the spread of the virus, airports and venues are starting to prepare for quarantine and safety checks, changing facility layouts and operations to process flows of visitors. Operators might transform crisis units into permanent health and safety committees to be ready for action in case of health crises. For example, the touch-free experience and the digitalisation of the customer journey will keep growing after the crisis.

2.4. Current practices of Member States

This section presents a selection of good practices introduced throughout the emergency by different Member States to boost consumer confidence in travel.

Recovering MICE: Green Patio in Madrid

First signs of recovery were shown within the MICE sector. In March 2021, Spain successfully organized [an event](#) for the presentation of the new Volkswagen ID.4 (March 2021) at the Green Patio in Madrid with 330 participants and the experience proved to be safe. Among the protocols adopted were: 2 meters social distancing, rapid test at the entrance, use of masks, division of participants into small groups, and the use of RFID bracelets for tracking.

Recovering MICE: Fiera di Roma in Rome

In Italy, [Fiera di Roma](#) (in Rome), applied very strict protocols to restart activity, which included the use of electronic bracelets that beeped when an unsafe distance among people was reached, floor icons to show one-way patterns, testing on site, health care staff on site, the use of technology to create touch-free experiences, fair stands built to allow ventilation (with no roof) and tracking to limit the number of people in each pavilion, the use of face coverings, etc. Among the safety protocols were: social distancing (2 meters), visitor flows strictly monitored, mandatory use of masks and gloves in each stage of the examination, strict sanitization protocols of venues and furniture, temperature checks, medical staff on site, pre-screening venues adequately equipped, number of people arranged according to ventilation system, square meters, and floor typology.

UEFA EURO 2020 in Rome

As far as sports events are concerned, Rome hosted the [UEFA EURO 2020](#) at the Stadio Olimpico and strict protocols were adopted to guarantee a safe experience: restricted access (a certain number of people were allowed in every 30 minutes, each ticket had a time range of 30 minutes, e.g., 18.00-18.30, 19.00-19.30), entrance allowed with a negative COVID-19 test result issued at least 48 hours before the event, digital tickets. At the entrance visitors needed to show their document, the digital ticket and the test result; after this first check people entered a tunnel where their temperature was checked by a thermal scanner and – if everything was in order – the ticket was activated. The staff working in the stadium needed to have a negative test result or a vaccine certificate. In the stadium the flow of visitors was controlled and there was a mandatory distance of four empty seats for every guest (for a total of 17,000 visitors). In the stadium there were two medical posts where people could get swab tested if they showed symptoms and be isolated if necessary.

Tourism Ljubljana raises awareness on tourism benefits to the local community

[Tourism Ljubljana](#) launched a campaign to raise awareness in the local population on the benefits of tourism to the local community (e.g., bike parks, festivals, sports facilities, electric buses for mobility financed with tourism taxes). Tourism Board Ljubljana used digital tools and promotional panels across the whole city showing the residents that bike parks, festivals, events facilities and other infrastructure were built using tourism income. The campaign was very informative and received a lot of attention among local and international media, as well as local non-governmental organisations and residents. Ljubljana provided a clear example on how to present the often neglected benefits that tourism provides to local communities.

Amusement and theme parks

Hellendoorn, the Netherlands's [amusement park](#), launched an initiative to encourage people to visit the theme park. In April 2021, 2,000 tickets were on offer to visit the amusement park and 75% of the tickets were sold. Hellendoorn was the first park in the Netherlands to reopen after the lockdown. Visitors over 12 years old needed to order a ticket online and book a COVID-19 test at a small number of designated locations. A negative test result taken no more than 40 hours prior to admittance had to be presented on a smartphone app at the entrance, along with proof of identification.

Spain's Palma de Mallorca

During Easter 2020, some EU countries opened their borders to other EU citizens. For example, [Spain's Palma de Mallorca](#) (part of the Balearic Islands) welcomed German tourists as part of a pilot program to test the efficiency of the new coronavirus protocols. According to an article in *El Pais*, 10,700 Germans arrived over a period of two weeks. The visitors stayed for at least 5 nights at one of the hotels operating at reduced capacity. Guests were monitored for symptoms of COVID-19 and if needed, isolated at nearby apartments.

Destination Tracker

The World Tourism Organization (UNWTO) and the International Air Transport Association (IATA) announced the launch of the [Destination Tracker](#) on April 23rd 2021 to boost confidence and accelerate recovery of the tourism sector when borders reopened. The UNWTO-IATA Destination Tracker is a free online tool for governments to provide information on COVID-19 requirements for travel and the measures in place at the destination.

3. DIGITAL AND GREEN TRANSITION: EMERGING TRENDS AND POTENTIAL MID- TO LONG-TERM EFFECTS ON TOURISM

KEY FINDINGS

- The tourism industry was starting to engage with the digital and green transition prior to the pandemic. The current crisis highlighted further the need to accelerate this transformation.
- To support a sustainable transition, investments in infrastructure (e.g., energy efficient accommodation facilities, sustainable conference and meeting venues, greener transport means, etc.), employees' sustainable skills, sustainable measurement of tourism success and inclusion of local residents in tourism development represent essential actions.
- For a successful digital transformation of the industry, investments in digital infrastructure, a tourism data strategy, the implementation of enabling technologies and employees' skills are of paramount importance. Digitalisation represents a horizontal policy tackling all other aspects of industry transition such as fostering sustainability, increasing productivity or building competence.
- To rebuild tomorrow's tourism, a paradigm shift is necessary. The weak financial situation of tourism operators and liquidity problems, mainly among small and medium-sized enterprises (SMEs), may negatively impact investments in the digital and green transition.
- Without significant support from the Recovery and Resilience Facility (RRF) and MFF (Multiannual Financial Framework 2021-2027), the green and digital transition will be endangered and the long-term competitiveness of the European tourism sector jeopardized.

3.1. Introduction

The impact of the pandemic, the behavioural changes of future travellers, and the measures adopted by the sector have led to several emerging trends which represent both challenges and opportunities to relaunch tomorrow's tourism. As stated in the previous chapters, short-term consumer trends are: "staycations" (taking holidays closer to home), longer holidays, short booking windows (confirmed by an increase of last-minute bookings), travellers searching for local experiences, special attention to safety and hygiene, and renewed interest in outdoor and nature-based activities. Long-term industry trends are related to achieving greater sustainability and further digitalisation. These trends were emerging before the pandemic, but the health emergency has accelerated the speed of change and represented a good moment to reflect on the future of tourism.

In this chapter, the focus is on supply-side trends that will shape the tourism industry of tomorrow, tackling trends and potential medium- to long-term effects of COVID-19, investigating their effects on the tourism sector. Trends are divided in two sections: 1) greening the industry and 2) the digital transformation of the industry.

3.2. Green transition

3.2.1. Investment in green infrastructure

Major stakeholders in the tourism industry, including operators, international, national, regional, or local tourism organizations, all agree that green transition investments are necessary to restore the tourism industry and bring mainstream sustainable policies and practices to life. The **European Green Deal** and its plan to turn Europe into the first 'climate-neutral' continent by 2050 is to be achieved through a set of [measures to reduce Europe's emission of greenhouse gases](#). Tourism policies should [take an active role](#) in this transformation.

To reach the Green Deal targets and embody the concept of the green transition, the tourism industry has to develop more [sustainable tourism business models](#). In this process, tourism operators have to invest in [ecologically responsible practices for accommodation, food, attractions, and transport](#), amongst others. Yet, tourism operators along the tourism value chain are in poor financial conditions due to the pandemic and have liquidity problems. The investment cycle in the sustainable transition will depend on the [Recovery and Resilience Facility](#) plans (RRF) and Multi Financial Framework plans (MFF). Therefore, active participation of policy makers should take place at all levels of government. Suitable solutions to support the transition to a green, low-emission and climate-resilient tourism economy will depend on governance and on the interaction between the public and the private sector. This active participation of different policy stakeholders should take place not just at the Member State level but – more importantly – at European level.

The industry has a unique opportunity to invest in [greening the existing tourism infrastructure](#) (places of interest/attractions, accommodation capacities, leisure, meeting venues, mobility infrastructure, etc.) in line with the [Renovation Wave for Europe](#). It will lead to more [sustainable buildings, create new jobs, improve the life quality of the local population \(renovation should consider both the needs of tourists and locals\), reduce carbon emissions, and shift to energy-efficient sources](#) according to the [Green Deal](#) objectives.

Tourism is interdependent with other sectors (agriculture, retail, construction, education, culture, creative industries, transport, etc.) and has significant indirect effects throughout the economy. Improvements towards sustainable practices and investments will also have an [impact on many different sectors beyond tourism](#). It will also provide the industry with the rationale for linking Sustainable Development Goals ([SDG targets](#)). The green transition should also follow [circular economy processes](#) such as reducing and reusing, repairing, refurbishing and recycling.

Actions to green the industry of tomorrow could be using hydrogen power plants powered by renewable energy, solar technology, the development of efficient cooling and heating systems, supporting the renovation for more energy-efficient event venues, the reuse and valorisation of heritage buildings, employment of local people in tourism, etc.

The [Euronews travel trend report](#) emphasizes that tourists will search for more personalised products but not at the cost of the planet and local communities. Post-COVID tourism must keep sustainable goals in mind to mitigate the impact of travel flows on destinations. For example, even smaller initiatives like using [solar powered passenger boats, solar windows](#) or just increasing the share of local food on the menu can help in greening the industry.

Another aspect relates to the change of travel habits towards a climate-friendly mobility within Europe. The climate crisis and COVID-19 pandemic made passengers rethink their travel choices, favouring more sustainable transport means. The recent revitalisation of night trains with new night train

connections and services (e.g., Austrian Federal Railways (ÖBB), the German rail company (Deutsche Bahn), SNCF and Swiss Federal Railways (SBB) signed an [agreement to launch new night train services in Europe](#)), is an emerging trend that supports the green transition from a travel perspective.

3.2.2. Building sustainable skills

To reach the sustainable transition, tourism workers need applicative skills. Sustainable practices must be embedded in national tourism education and training curricula. Tourism employees from front-office and back-office level to top management positions in tourism need to improve their [knowledge, skills and sustainability competences](#). Skills and competences will increase the industry's innovative capacity and indirectly raise the profile of tourism as a quality employer. For example, many hotels or other tourism operators across EU do not employ environmental managers. Front office employees may have little knowledge about [sustainable experiences \(minimizing the impact on the environment\)](#), and in many cases, staff working in restaurants and events need additional training on how to maximize the use of local ingredients and reduce food waste.

Examples of building sustainable skills include: provision of funding for sustainable upskilling and reskilling, development of platforms for sharing the best practices, developing a mentoring program for SMEs, development of green schemes, etc.

3.2.3. Measuring success within the pillars of sustainability

A well-known quote from Peter Drucker states that "You cannot manage what you cannot measure". Tourism statistics are mainly based on economic performance indicators, but tourism is a complex phenomenon affecting the environment and society in general. Before the pandemic outbreak, the European Commission (EC) proposed the introduction and use (on a voluntary basis) of the [European Tourism Indicators System \(ETIS\)](#) to help destinations measure their performance concerning sustainability. Likewise, according to the Organisation for Economic Co-operation and Development (OECD), to truly reconsider the [perception of tourism success, we need a paradigm shift](#) in the perception of tourism stakeholders, [with a greater focus on environmental and socio-cultural pillars of sustainability](#).

[Tourism Manifesto](#), the alliance of more than 60 European public and private organizations, also stressed the need to [measure CO₂ emissions related to tourism processes while favouring an acceleration towards the decarbonisation of operations](#).

3.2.4. Residents as important players in tourism development

Residents play a crucial role in the development and transformation of more sustainable models of tourism. Tourism policies should be strongly incorporated in local communities, increasing the life quality of the local population. NECSTouR initiated the Barcelona Declaration "[Better Places to Live, Better Places to Visit](#)" in 2018 to show what the tourism and cultural sectors can achieve by working more closely together for the benefit of European citizens, businesses, visitors and destinations. The Barcelona Declaration is in line with the Sustainable Development Goals (SDGs) and points out the important role of all stakeholders, specifically residents, in the development process. As suggested by [Euromonitor \(2020\)](#), new approaches in tourism should improve the satisfaction of residents about tourism and increase awareness among residents on the benefits that tourism brings to the community.

3.3. Digital transition

The World Economic Forum (WEF) stated that digitalisation will generate up to [250 billion EUR](#) (own calculation from USD to EUR) of additional value for the tourism sector by 2025. At the same time, [around 82.5 billion EUR of value](#) will be transferred from traditional to new digital players in the industry. This will initiate an innovative transformation process along the whole tourism value chain. Overall, the benefits of digitalisation on society will be visible also through the reduced environmental footprint of tourism, improved safety and security, and reduced cost and time for consumers.

Digitalisation represents the ultimate opportunity for the tourism sectors but also a challenge. Tourism companies' demands are global, yet they are mainly operating in local environments and SMEs have a limited capacity to invest in the adoption of digital technologies.

To favour and enhance the digital transition process, the European Commission developed the [Digital Tourism Network](#), a forum designed to connect public and private stakeholders to discuss common challenges and opportunities associated with the EU tourism industry's digital transformation, and exchange good practices in order to boost the innovation capacity of tourism entrepreneurs, especially SMEs.

3.3.1. Rapid broadband services: digital infrastructure

[The Tourism Manifesto](#) pointed out that the digital transformation in the Tourism and Travel industry is significantly related to infrastructure. The starting point of such a transformation is to cover extensive areas with broadband services, including fibre and 5G. Rapid broadband services are an initial prerequisite of the digital transformation of the industry at several levels: they are not 'tourism specific' but cover multifaceted aspects of life (e.g., education, business operations, etc.). The initial steps in the digital transformation are investments in digital infrastructure which are not tourism dependent but depend on the overall digitalisation of the economy and the society.

3.3.2. Tourism data strategy

As pointed out by the [Tourism Manifesto](#), the digitalisation of the tourism industry will not be possible without data. The sector is '[information intensive](#)', providing a fruitful ground for the use of enabling technology. To facilitate data access, a tourism data strategy must be implemented enabling authorities to access suitable data to address and achieve sustainability in tourism management. Tourism data will enable real-time data use by tourism stakeholders and lead to better decision making, based on relevant data. For instance, tourism intelligence systems (i.e., data on tourists' arrival or consumption collected and analysed using artificial intelligence providing real time aggregate data on tourist arrivals, overnights, transport, spending etc.) are a vivid example of data utilisation for both business and destinations. Destinations with dashboards provide real-time information on visitor numbers, tourism numbers, tourist expenditure, tourism flows, etc. which are important for smart and data-driven decision making.

3.3.3. Implementation of the enabling technologies

The [implementation of the enabling technologies differ among the Member States](#). Nordic countries have shown a higher uptake of digital technologies compared to eastern and southern European countries. Furthermore, [SMEs lagged behind large enterprises in technology adoption](#). Most of the activities related to technology adaptations are connected to marketing and sales, while more [advanced technologies such as data analytics, cloud computing, artificial intelligence, virtual reality, geo-localization etc. had limited acceptance rates among tourism operators within EU Member States](#).

The pandemic emphasized the urgent need of implementing enabling technologies in the tourism industry throughout the whole value chain. Those [enabling technologies](#) include mobile technology/cloud computing, data analytics, artificial intelligence, internet of things, augmented reality/Virtual Reality (AR/VR) and blockchain technologies⁶ which are currently underused in the tourism industry.

3.3.4. Digital skills

[Research shows](#) that post-COVID tourists will have an even more digital profile, looking for alternatives for their vacations via online platforms. Tourists will be more prone to digital solutions providing personalised and real time information. Tourism jobs will require both technical and advanced soft skills to meet those expectations on the demand side. The [European Skills and Jobs Survey](#) (ESJS) from 2014 estimated that around 85% of all jobs need basic level digital skills, including additional generic and specific skills required for the job. Those skills have to be complemented with [cognitive skills \(such as problem-solving, creativity, learning to learn, etc.\) and socio-emotional skills \(such as communication, collaboration, contact management, etc.\)](#).

3.4. Current practices of Member States

This section presents a selection of good practices introduced throughout the emergency by different Member States to boost the digital and green transformation of the industry.

3.4.1. Digital transformation

Google joined the ETC as an Associate Member

[Google has joined the European Travel Commission](#) (ETC) as an Associate Member to share insights and tools for destination management organizations (DMOs) to reach potential visitors during their travel planning phase. In Italy, for example, the trend of searches carried out on Google from January to April 2021 recorded a growing interest in national tourist destinations, rising from a share of 55% in 2019 to 79% this year.

6G Flagship Lab in Finland

The [University of Oulu established a 6G Flagship Lab](#) testing and developing technologies to speed up the digitalisation process and merge communications and sensing in a new, complete way (more digital and sustainable). 6G is expected to provide extremely high-speed communication and an evolution of data rates in wireless systems. 6G will also include many high-precision sensing applications to improve the digital experience. It will also be more energy efficient than existing technologies. This technology can further change the MICE industry by 2030, not just in terms of high-speed data transition but in terms of digital and virtual events' quality of experience.

The [Finland Convention Bureau](#) is working in partnership with University of Oulu to develop innovative events.

Andalusia Lab and Tourism of Tomorrow Lab

The [Andalucia Lab](#) is a department of the Andalusian Tourism Board that aims to boost SMEs' digital and tech skills through workshops, personalized sessions, and demotechnical solutions. The Andalusia Lab has used different ways, including workshops on digital skills and technology, personalised

⁶ Blockchain is a system of recording information in a way that makes it difficult or impossible to change, hack, or cheat the system. A blockchain is essentially a digital ledger of transactions that is duplicated and distributed across the entire network of computer systems on the blockchain.

sessions for tourism professionals, and demos aimed at creating awareness of available technological solutions.

The [Tourism of Tomorrow Lab](#) aims to build an EU hub for gathering research, expertise, and data on tourism to benefit both public and private regional tourism stakeholders. It is a pilot project of three regions (Andalucia, Lapland, and Slovenia) to identify the data need for efficient tourism management. The Tourism of Tomorrow Lab mission is to create a 'culture of data' for tourism decision making and build 'intelligence tourism hubs' capable of taking full advantage of the EU Data Space.

Tourism Innovation Centre Portugal (NEST)

The [Tourism Innovation Centre Portugal \(NEST\)](#) aims to promote the transition of the tourism sector to the digital economy and foster innovation in the sector. It is a private association established in 2019, with founding partners including Airports of Portugal, BPI Bank, Portugal Highways, Google, Microsoft Portugal, Millennium BCP, NOS (Telecom) and Turismo de Portugal. Partners provide not just the financing but also the expertise. NEST aims to become a global centre for innovation (specifically digital innovation) in tourism. The Centre's objective is to bridge the knowledge in digitalisation and tourism between different stakeholders to promote entrepreneurship, innovation and research; develop creative and innovative solutions; collaborate with universities, tourism schools and knowledge centres to transfer and produce knowledge for the industry.

Developing Leaders for Hospitality and Tourism programme in Ireland

In February 2021, Ireland launched the [Developing Leaders for Hospitality and Tourism](#) programme for managers and employees. Employees are trained in customer care, digital skills, communication, strategic planning and management, and green skills. The programme was developed in collaboration with Fáilte Ireland (the National Tourism Development Authority), the State Agency responsible for further education and training (SOLAS), and the Irish Hotels Federation (IHF).

3.4.2. Green transformation

Sardinia sustainable tourism solutions to reduce pollution in the Mediterranean area

The Sardinia Region sustainable development strategy [Sustainable Tourism solutions to reduce pollution in the Mediterranean area](#) aims to reduce pollution by adopting an ethical and sustainable tourism consumption model. The specific focus is on ecotourism, cycle tourism, waste management and water management.

France: Developing a roadmap for greener tourism following the COVID-19 crisis in Corsica

[The pandemic increased the awareness](#) of local stakeholders on the vulnerability of the island's tourism economy to external shocks and on the island dependence on tourism. This awareness accelerated the ecological transition and strengthened the coordination of stakeholders across the tourism value chain. The role of the roadmap is to stimulate quality rather than quantity tourism, encourage visitors to explore the region while being respectful of the natural environment, and bring benefits to local communities and residents.

[Helsinki Think Sustainably App](#)

In Finland, a [Think Sustainably](#) app helps locals, visitors, and residents to choose more sustainable ways of living or enjoying the city of Helsinki. The app was launched in 2019 and filters content from the MyHelsinki.fi website to suggest sustainable providers: restaurants, shops, sights, events, accommodation, etc. The app will be further developed to include sustainable mobility options.

France: Tours by locals

The initiative aims to connect locals with tourists by providing the tourists with an exceptional local guide and local experience. The visitor may find a local guide using an online platform and book an innovative tour to enjoy the local culture and way of life.

4. RECOMMENDATIONS FOR EU POLICY MAKERS

KEY FINDINGS

- Tourism is an important and multifaceted industry with significant multiplier effects on other industries, making it a priority in the EU Agenda. Yet more visibility is required regarding the coverage of tourism in financial programs and EU policies.
- In the short run, tourism governance needs to be improved by developing a bold and dedicated EU tourism strategy (The European Agenda for tourism 2030/2050), in partnership with different authorities at all governance levels and industry players, with clear aims, objectives, and implementation plan.
- The EU Digital COVID Certificate is a very important instrument for reactivating tourism flows. There is an urgent need to harmonise protocols (e.g. for children, regarding travel to third countries) and improve communication about travel protocols and national health passes usage for EU citizens. Easing procedures at the EU level would facilitate a faster recovery.
- An overview of the financing opportunities from the Recovery and Resilience Facility (RRF) and the Multiannual financial framework (MFF) 2021-2027 is needed to better inform and promote financial opportunities for tourism stakeholders in Member States.
- Eurostat should improve the measurement of the economic performance in the tourism sector by introducing *Tourism Satellite Accounts* (not just at the Member State but also regional level). Eurostat should also develop and measure the environmental and social performance of the tourism industry.
- A European Tourism Data Space should be developed to favour the digital transformation of the tourism industry.
- The European Agenda for Tourism 2030/2050 should provide clear guidelines for Member States and regions on the emerging digital skills and competences needed for a consistent digital transformation in the tourism sector. A dialogue between authorities has to be established in order to implement this European Agenda.
- This Agenda should also provide guidelines for the industry's sustainable transition and suggest actions to mitigate the climate emergency.

4.1. Introduction

This chapter provides recommendations on how authorities, notably at the EU level, could support the tourism sector's recovery. The issues at stake are 1) the capacity to manage tourism at the EU level, 2) tourism financing, 3) fostering a sustainable transition and 4) empowering digitalisation.

The urge to have more capacity to manage tourism at the EU level was already felt before the outbreak of the pandemic, along with the necessity for a faster digital and green transformation of the industry. The pandemic has accelerated the need for a faster and bolder transformation.

4.2. Recommendations

4.2.1. Capacity to manage tourism at the EU level

- **Develop and efficiently implement a Tourism Strategy in the short run and rethink tourism competence at EU level in the long run**

[Europe, the world's No. 1 tourist destination](#) Communication from 2010 still represents a policy framework at the EU level in the field of tourism. The [European Agenda for Tourism 2030/2050](#) that will be published in 2022 should be a dedicated EU tourism strategy with clear aims, objectives, indicators and actions for tourism in the EU involving all tourism stakeholders. It should also clearly communicate an action plan and implementation mechanisms and in this way improve tourism governance in the short run. The dialogue between authorities has also to be established in order to implement the European Agenda for Tourism 2030/2050.

[The Lisbon Treaty](#) acknowledges the importance of tourism, outlining a specific competence for the EU in this field and allowing decisions to be taken by a qualified majority. Article 195 of the Treaty on the Functioning of the European Union (TFEU) defines tourism as a supporting competence: “the Union shall complement the action of the Member States in the tourism sector, in particular by promoting the competitiveness of Union undertakings in that sector”.

The pandemic has shown the limitations of the existing EU competences in the field of tourism when it comes to tackling the consequences of such a crisis and relaunching the sector. In the long run, the EU competences in the field of tourism may be rethought and aligned with the transport competences. This would help to maximize the impact of EU policies in the field of tourism in order to better manage future crisis and avoid regulatory complexity.

- **Improve EU capacity to manage tourism**

Due to the relatively limited competences of the EU in the field of tourism, it is not possible to harmonize and implement policies directly and indirectly related to tourism. The European [Parliament called on the Commission](#) to: “establish a new governance model between the EU Institutions, strengthening the organizational, financial and human resources structure by setting up a dedicated Directorate dealing specifically with tourism, backed by adequate funding, with a view to taking an integrated and efficient approach to tourism, supporting the relaunch of tourism in European regions and helping businesses to implement the measures needed to achieve key objectives in the areas of sustainability and innovation, and increasing their competitiveness and attractiveness”. At the moment tourism is dealt with in the European Commission by a [Directorate](#) for Ecosystems II: Tourism & Proximity in DG GROW i.e. the Commission department responsible for EU policy on the single market, industry, entrepreneurship and small businesses. Such a department should have more competences and adequate financing to perform an efficient tourism policy implementation at the EU level. As communicated in [Tourism Manifesto](#), there is a need to establish a strong governance and strategic planning of the European Tourism policy in order to build resilient tourism for the future. This should then be translated into an appropriate financial support necessary for the industry to restart. In the short run, this could be achieved by establishing an expert group coordinated by EC/DG Grow with participation from other DGs and national tourism related managing authorities. Such expert group would help to: 1) define the strategic priorities (following The European Agenda for Tourism 2030/2050); 2) provide a systematic impact assessment on EU policy actions directly or indirectly related to tourism; 3) promote and monitor financial opportunities for tourism stakeholders or other types of support initiatives.

- **Single Tourism Market**

The Single Market refers to the EU as one territory without any internal borders or other regulatory obstacles to the free movement of persons, goods and services. The pandemic has shown how much the Single Market is also depending on tourism (free movement of persons) and how the lack of tourism operations has brought many negative impacts in terms of income and job loss to local communities, regions and Member States. The pandemic showed that we have a very fragmented tourism market and that tourism is entirely dependent on the well-functioning of the EU Single Market.

Yet, currently there are different standards and protocols for visiting tourism businesses and service providers (hotels, restaurants, bars, museums, events, etc.) not just between the different Member States but also between different regions within a Member State. Therefore, a fully functional Single Market is extremely important in order to reshape the Tourism and Travel industry at the EU level. The European Single Market would ensure harmonised travel protocols within Member States and establish unified action towards third countries. This would imply that tourists travel smoothly across the EU with just one single paper and share unified travel and safety protocols.

- **Harmonize travel protocols**

The creation and implementation of the EU Digital COVID Certificate was a very important step for restarting tourism before the summer season 2021 and was largely welcomed and appreciated by tourism stakeholders. As of August 2021, it was clear that the adoption of the certificate had some caveats that needed to be tackled. With the introduction of the EU Digital COVID Certificate, in July and August 2021 Member States introduced national health passes to regulate access to attractions and facilities (e.g., restaurants, hotels, museums, events etc.). The coexistence of different health passes (often named “green passes”) hinders their usability (e.g., some green passes are released after the first vaccination, others are only released 14 days after the second vaccination).

The following issues should be tackled to improve the EU Digital COVID Certificate performance:

- Ensure that tests (PCR or antigen) are free or at least affordable for travellers;
- Use available technology to ensure that the EU Digital COVID Certificate checking is easy and time-efficient to avoid waiting times during departure or arrival (airports, ports, stations, museums, events, etc.);
- Communicate with Member States to ensure the presence of competent and digitally literate staff at border control points (airports, ports, railroad stations, etc.) to reduce queues;
- Integrate the Passenger Locator Form (PLF) into the EU Digital COVID Certificate as a useful solution to avoid duplication and reduce waiting times upon arrival and departure;
- Ensure harmonised protocols (and related information) for children and teenagers;
- Ensure harmonised protocols towards third countries;
- Adopt a standardised approach for visiting tourist attractions and hospitality facilities across the EU.

- **Improvement of communication among Member States concerning travel restrictions, COVID tests and quarantine rules**

The EU has launched the [Re-Open EU platform](#), an interactive map with real-time travel information on restrictions and safety protocols adopted in each Member State. Yet, many EU citizens are neither aware of its existence nor use this platform. Communication campaigns should give information

aligned with the content provided on the platform Re-open EU and with information provided at national levels.

Another initiative is the [#OpenUpToEurope](#) campaign, a cooperation between the European Travel Commission, the European Union and the tourism industry to inform and inspire Europe's citizens to travel. The platform ([#OpenUpToEurope](#)) is aimed at providing information on passes and protocols while promoting European destinations. Clear and easy to use, [#OpenUpToEurope](#) represents a key tool to increase online engagement and deserves to be widely promoted and made known via different channels (e.g., Facebook, Instagram, LinkedIn, etc.).

Actions which should be taken to boost consumer confidence in travelling are:

- Urge Member States to provide clear information on COVID related measures and restrictions on free movement as soon as such changes are introduced to ensure that the [Re-Open Europe EU website](#) is updated with reliable information for travellers;
- Update information on the [#OpenUpToEurope](#) campaign;
- Link the Re-Open EU platform with national platforms;
- Provide a precise outlook of each country's latest epidemiological situation in a detailed ECDC map and present it in a customer-friendly fashion (simple and easy to understand);
- Add information on further Member State requirements to visit different tourist attractions and cultural heritage sites.

The above can be achieved by **creating a unique, comprehensive, and clear platform/portal where detailed information on travel protocols is conveyed**; multilingual, official, linked to national platforms, and user friendly. Such a platform would be a very useful instrument to communicate clearly and reassure people and could be linked to apps and to the most used digital tools, such as Facebook, Instagram, YouTube, etc. It should be designed with a high degree of marketing know-how and be accessible in the official EU languages (with English as the lingua franca).

The platform could also be used to promote the European Tourism COVID-19 Safety Seal and stimulate its implementation among Member States. This Safety Seal was launched in May 2021 by the European Commission, providing guidelines to safely restart tourism. Yet, many National Tourism Organizations (NTOs) promote national safety and hygiene standards (most of them aligned with the WTTC's ['Safe Travels': Global Protocols & Stamp](#)) and do not actively use or promote the European Tourism COVID-19 Safety Seal. In order to harmonise safety and hygiene protocols, the European Commission should launch a promotional campaign at the EU level to inform operators and tourists and increase awareness about the European Tourism COVID-19 Safety Seal.

- **Support Destination Management Organizations (DMO) in the transition**

Destination Management Organizations (DMOs) will be even more important for tourism stakeholders in the future. DMOs will need to facilitate the industry transition process to becoming green, inclusive and digital. DMOs taking over more development, management and governance functions may help to promote a more efficient recovery of the Tourism and Travel industry. DMOs need guidance and support to enhance a radical transformation and transition. The role of DMOs should also be addressed in the future European [Agenda](#) for Tourism 2030/2050.

4.2.2. Tourism financing

- **Better leverage from the Recovery and Resilience Facility (RRF) and the Multiannual Financial Framework (MFF)**

The COVID-19 pandemic has significantly impacted tourism operators' economic performance, liquidity, and investment capacity. In order to address sustainability and support the green and digital transition of the industry, EU financing plays a crucial role. As of September 2021, 16 EU Member States had included tourism related priorities in their national recovery and resilience plans, but unfortunately, the Multiannual Financial Framework (MFF) does not include a dedicated line for sustainable tourism, which would represent a commitment to support the tourism sector's recovery. Furthermore, it is important that programs include, as directly as possible, the tourism sector, which would also improve the effective leveraging of the funds. The solution could be the creation of group of tourism experts coordinated by EC/DG Grow with participation from other DGs and national tourism related managing authorities. This expert group might help to set strategic priorities, systematic impact assessment on any EU policy action has on tourism, adapt calls for projects and other types of support initiatives. The investments/funding provided should request projects to focus on the green and digital transition, to guarantee that, besides supporting the sector financially, support to EU current policy targets will be met.

- **Support measures to preserve and promote tourism employment**

At national level, State aid plays a central role in supporting the industry. The EU has provided significant financial support to Member States to help their economies. By the end of August 2020, [the EU made EUR 1,358 billion in State aid measures](#) available to compensate the Member States which have less financial capacity and to safeguard internal national markets. As stated in chapter 1, 3.6 million jobs were lost in 2020 in tourism in Europe due to the pandemic. Predictions were that [11.7 million jobs in Europe](#) could have been lost without state support. Vulnerable groups of the population, females with lower education and younger employees are affected the most. Even though in 2020 Member States adopted financial measures to protect jobs and sustain the industry's recovery, part of the tourism value chain has significant liquidity problems and employees have lost their jobs. The European Agenda for Tourism 2030/2050 should address necessary and advisable supportive measures at Member State level to preserve tourism employment until the end of the pandemic and also promote tourism as an employment opportunity for millennials and the Generation Z.

4.2.3. Fostering a sustainable transition

- **Roadmap for a sustainable transition**

Trends indicate the urgent need for a sustainable transition of the industry which demands investments in sustainable infrastructure, the development of sustainable business models and sustainability standards for small and medium-sized enterprises (SMEs). A roadmap should define sustainability standards and guidelines for implementation within the whole tourism value chain. This roadmap (providing clear guidelines) should be addressed in the European Agenda for Tourism 2030/2050.

- **Measuring sustainable performance in tourism**

The [European Tourism Indicators System](#) (ETIS) was developed by the European Commission as a set of indicators for measuring the environmental, economic and social performance in tourism. Eurostat is currently collecting data related to the economic performance of tourism and its sub-sectors. In order to improve the current understanding and measurement system in tourism, Eurostat should:

- Include Tourism Satellite Accounts (TSA) for measuring the tourism sector's direct and indirect economic impact on GDP and employment. TSA would provide a much better understanding of tourism's importance and contribution for specific regions and Member States;
- Include and measure environmental performance indicators in tourism (not yet included in Eurostat statistics);
- Include and measure social performance indicators in tourism (not yet included in Eurostat statistics).

- **Stimulating sustainable travel patterns**

The change of travel habits towards more sustainable ones, described in chapter 3, should keep being supported by the EU. Initiatives such as the revitalisation of night trains, the free travel passes from the [Discover EU initiative](#) –rail, bus and ferry- are examples of initiatives that contribute to reducing CO2 emissions by stimulating the use of cleaner transport means for leisure trips.

4.2.4. Empowering digitalisation

- **European Tourism Data Space**

[The European data strategy](#) aims at making the EU a leader in a data-driven society and creating a single market for data within the EU and across sectors. Tourism is not directly addressed in the European data strategy. The digital transformation of the industry strongly depends on data availability. The recommendation is to create a **European Tourism Data Space** (e.g. [Tourism Lab for Tomorrow](#) is trying to address data based tourism decision making at the EU level) and ensure real time data on tourism flows/movements within EU. This would help forecasting, marketing, management and product development aligned to sustainable development principles. It will also contribute to build the necessary skills for destinations to fully take up the potential of forecast and real time data to manage visitor flows more efficiently and also take full advantage of the European action in the field of data sharing.

- **Building tourism employees' digital skills**

Support needs to be in line with the challenges and objectives of the tourism value chain to answer new consumer patterns, product development and distribution, updating existing provisions as necessary. Digital skills should be built among the representatives of both the private and public sector in order to stimulate innovations, smart governance and data-driven decision making. This will be an essential step in the digital transformation of the industry, changing the mindset of the industry from manual to digital. This is clearly recognised in the European Tourism Manifesto, proposed by an alliance of more than 60 European public and private organisations covering the whole tourism value chain "[Call for action: Accelerate social and economic recovery by investing in Sustainable Tourism Development](#)" and the OECD policy paper "[Preparing the Tourism Workforce for Digital Future](#)". For instance, Spain has planned to launch an extensive educational program to build digital skills among tourism employees at all levels (airline workers, airport workers, receptionists, concierges, maintenance staff, etc.). The European Agenda for Tourism 2030/2050 should provide clear guidelines for the Member State, focussing on the digital skills needed to digitally transform the industry.

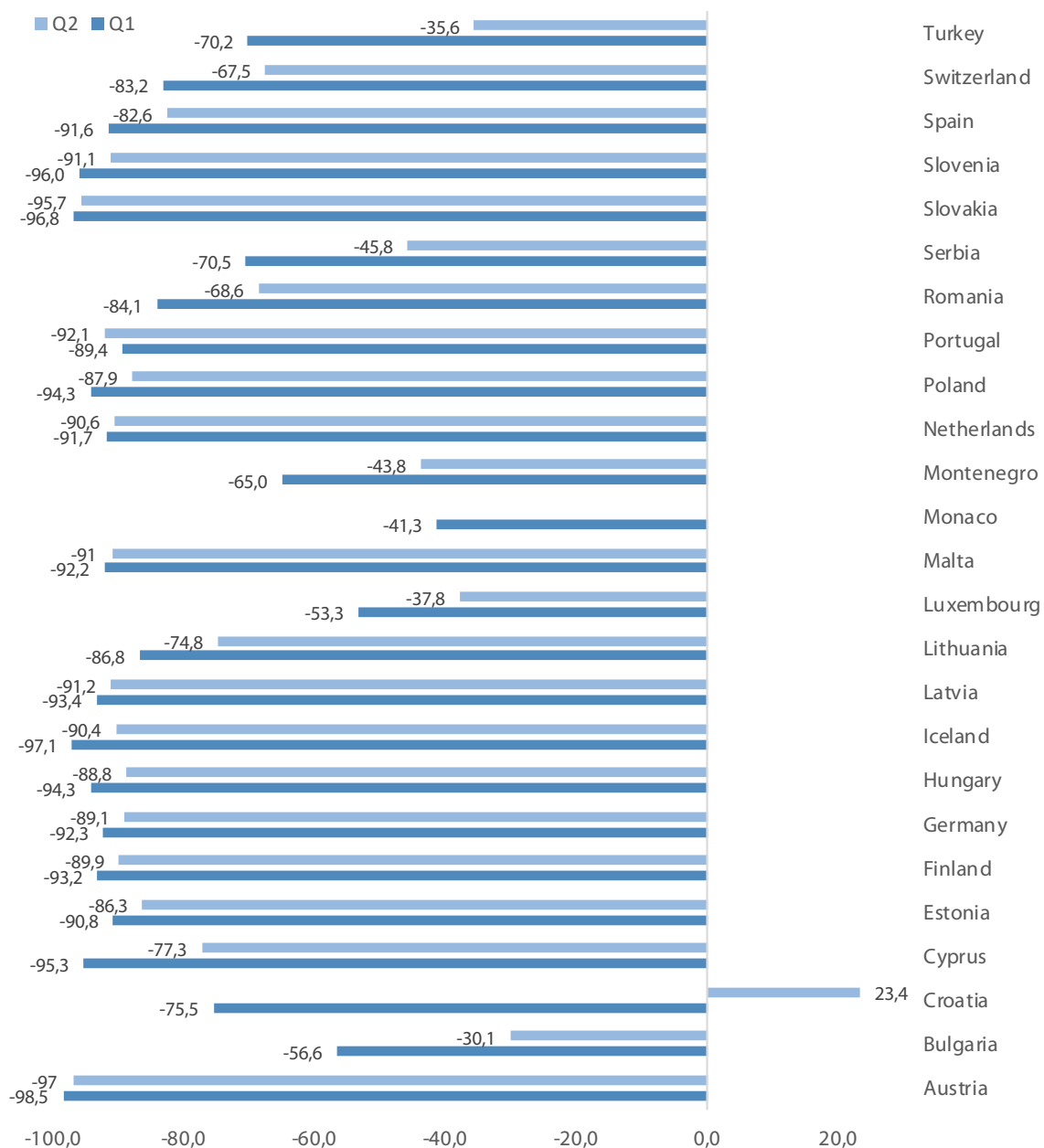
- **Guidelines on how to regulate the sharing economy**

Digital giants in the field of the sharing economy (such as Airbnb, Uber, etc.) significantly changed tourism and its impact on local communities. Experiences from many destinations have shown

"what you cannot measure, you cannot manage", which was one of the main challenges that local communities have with the development of a sharing economy offer. Quite different regulatory schemes were developed at local, regional and national levels in order to manage the sharing economy (from banning the sharing economy, limiting it at certain zones or to a certain period etc.). To ensure a similar competitive position of tourism operators across Europe, guidelines on how to regulate and manage the sharing economy should be provided.

ANNEXES

Annex 1 - Year to date change international arrivals for Q1 and Q2 2021



Sources: ETC (2021 [a](#), [b](#), [d](#))

Annex 2 - Hotel Performance 2021, year-to-date (Jan-May)

Country	OCCUPANCY	ADR	RevPAR
	% change year ago	% change year ago	% change year ago
Austria	-60.5	-28.4	-71.1
Belgium	-46.8	-14.8	-54.6
Bulgaria	-5.9	-9.7	-15.0
Croatia	25.5	3.8	30.2
Czech Republic	-68.7	-23.5	-76.0
Denmark	-35.4	-20.4	-48.5
Estonia	-16.5	-39.7	-49.6
Finland	-45.5	-11.8	-52.0
France	-19.0	-32.0	-44.9
Germany	-55.5	-25.6	-66.9
Greece	-26.3	24.0	-8.6
Hungary	-59.9	15.6	-53.6
Ireland	-57.7	-27.3	-69.2
Italy	-16.1	-13.4	-27.3
Latvia	-32.9	10.7	-25.7
Lithuania	-31.5	-18.9	-44.4
Malta	-52.6	1.5	-51.9
Monaco	-47.6	14.8	-39.8
Netherlands	-51.0	-21.8	-61.7
Poland	-51.6	-13.2	-58.0
Portugal	-45.0	7.3	-41.0
Romania	-19.5	-24.1	-38.9
Serbia	-4.7	2.3	-2.5
Slovakia	-67.2	-28.0	-76.4
Slovenia	-50.7	-19.8	-60.4
Spain	-25.1	-11.5	-33.7
Switzerland	-15.0	4.8	-11.0
Turkey	-6.4	44.1	34.8
UK	-31.6	-31.0	-52.8

Source: [STR \(2021\)](#). Note: *ARD and RevPAR growth based on local currency values.

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This thematic briefing provides the European Parliament's Committee on Transport and Tourism (TRAN) with an overview of the repercussions of the COVID-19 pandemic on the tourism sector, as well as policy recommendations to address the challenges emerging from the crisis.

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