

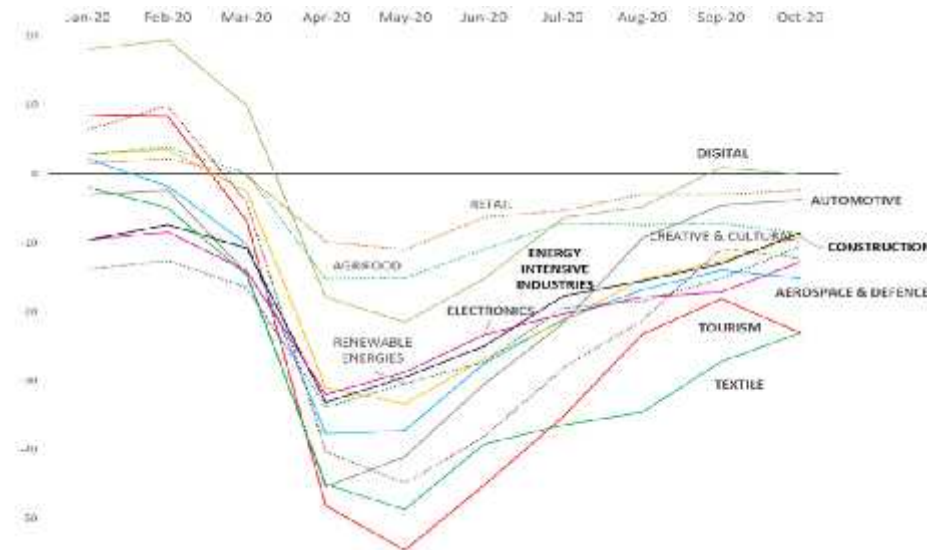
Outlook for the Tourism ecosystem

**EP Tourism Task Force meeting
Kerstin Jorna, Director General DG GROW**

23 February 2021

Tourism ecosystem fully disrupted by COVID-19

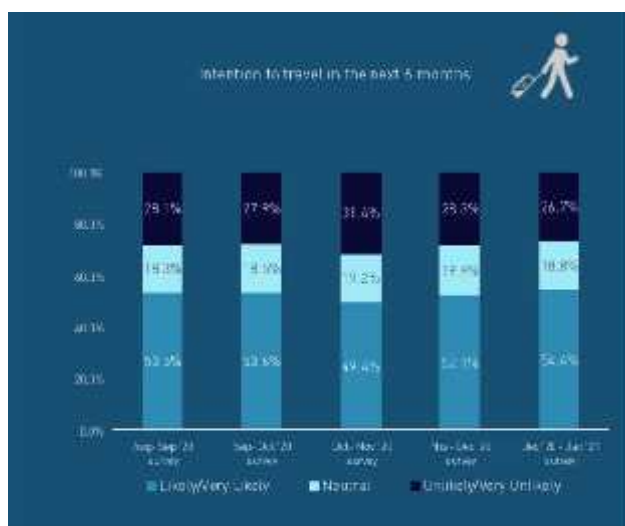
- International tourist arrivals plunged by 70% in 2020 over the previous year
- Highest investment gap of all 14 industrial ecosystems (€161bn 2020-2021)
- Lowest confidence indicator of all 14 industrial ecosystems (Jan 2021)
- Uncertain recovery prospects: return to 2019 levels not expected before 2023 (UNWTO)



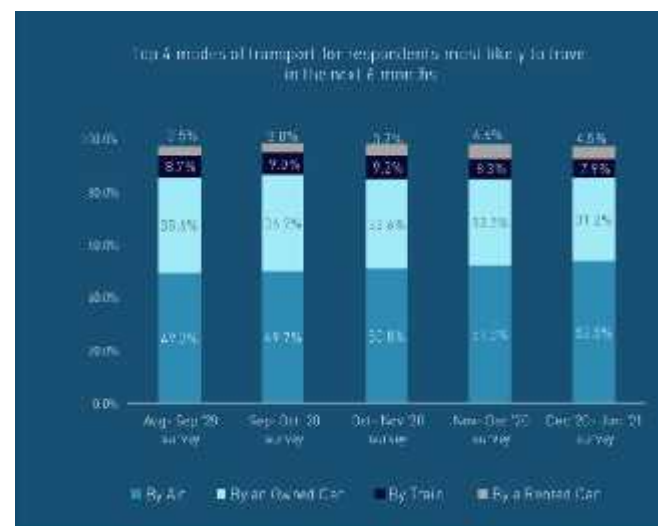
Travel sentiment in light of COVID-19 – January 2021

- Europeans increasingly eager to travel: 54% are willing to travel in the next 6 months
- Desire for intra-European travel building steadily: 41% plan to travel to another European country (the highest figure since last summer), while 35% prefer to stay in their own country for their next trip
- Preference for air travel slowly taking off

Travel intentions improve gradually: 54% of surveyed Europeans eager to take a trip by the end of July 2021

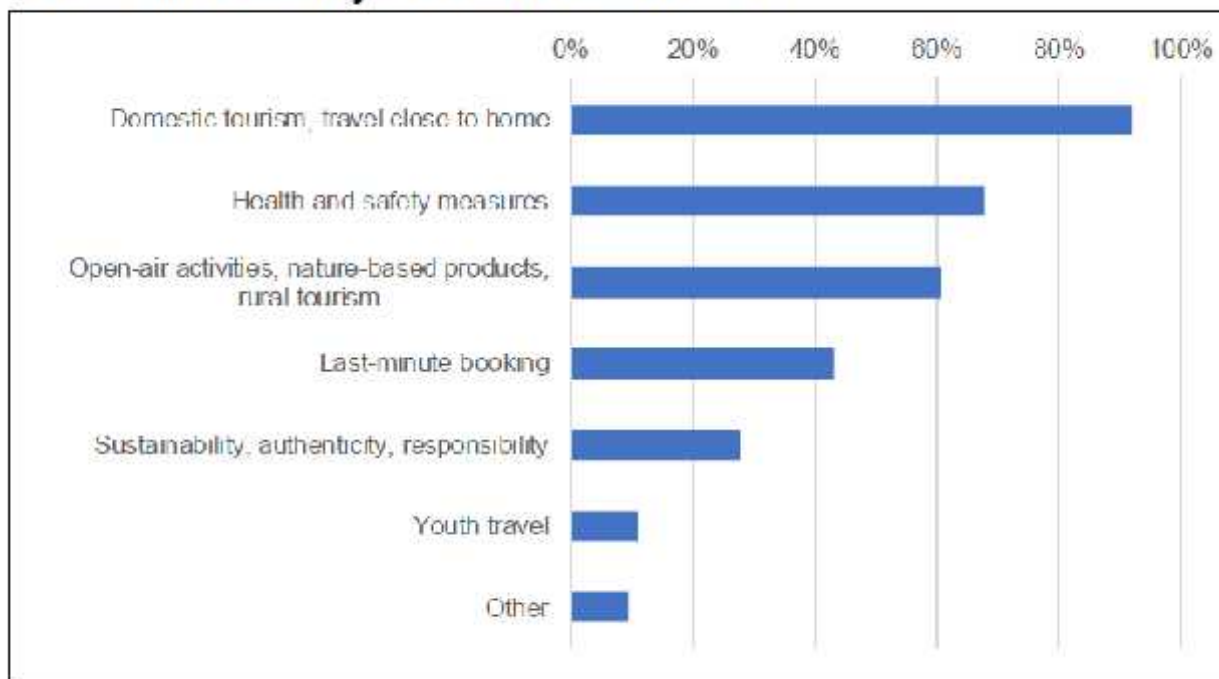


Consumers' preference for air travel is slowly taking off, providing a positive signal for the recovery of international tourism



Leading role for domestic tourism and travel close to home in 2021

What will be the major travel trends in 2021?



From the European Tourism Convention to the European Tourism Agenda

- ✓ Some 800 participants discussed resilience, sustainability, digital transition, innovation and the investment needed of tourism ecosystem
- ✓ 30 action points identified for future-proofing of EU tourism:

Safe and seamless tourism experience

- | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. The following study made two attempts to improve the accuracy of classification through cross-validation: bootstrap method, and bootstrap and jackknife. (10%) | 2. How can we improve data collection, e.g., find a more reliable source? Discuss the pros and cons of data collection from different sources. (10%) | 3. How can we design the correct set of questions of a questionnaire and process the responses in a more efficient and accurate manner, and including measures to reduce cross-sectional bias? (10%) |
| 4. What are the advantages and disadvantages of using a telephone survey compared to a face-to-face survey? (10%) | 5. What are the advantages and disadvantages of using a computer program to collect data? (10%) | 4. To improve the accuracy of the data collection, we could use more than one researcher to collect the data, and be blinded to the data and not to the changing treatment itself. (10%) |
| 6. What are the advantages and disadvantages of using a survey packet, postal survey? (10%) | 7. How can we manage the data more efficiently? (10%) | |
| 8. How can we improve the strategy of using and analyzing the data? (10%) | 8. What are the advantages and disadvantages of using a computer program to analyze data? (10%) | |
| 9. How can we improve the strategy of using and analyzing the data? (10%) | 9. What are the advantages and disadvantages of using a computer program to analyze data? (10%) | |

Greener Holidays

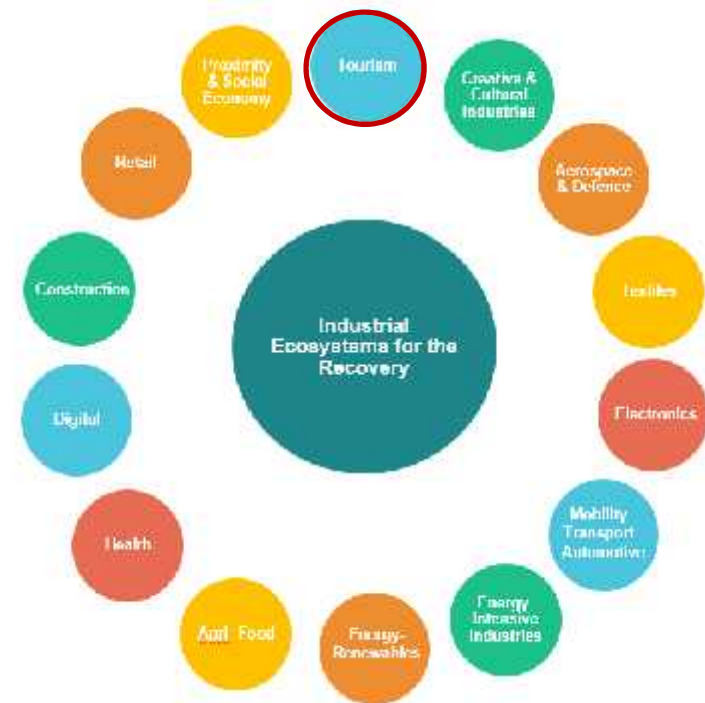
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Tourism powered by data

- [illegible]

Update of European Industrial Strategy: outlook for tourism ecosystem

- **Updated Industrial Strategy** to be adopted in March 2021 – learning from the crisis & strengthening the resilience of our Single Market Economy
- Tourism is one of 14 **industrial ecosystems** in the Industrial Strategy for Europe
- Identifying transformative initiatives to support the ecosystem in its **recovery, green** and **digital** transition



Towards European Agenda for Tourism: building blocks

Relaunch safe travel:

- ✓ Continue coordination on travel restrictions (vaccination certificate, Passenger Locator form, use of antigen tests)
- ✓ Building confidence (EU tourism sanitary seal)
- ✓ Reliable information to citizens (Re-Open EU, promotion campaigns ETC)

Sustainability - Develop monitoring framework for sustainable destinations:

- ✓ monitoring framework for destinations (building on ETIS)
- ✓ “carbon footprint tracker” for tourism
- ✓ Knowledge hub for peer learning

Towards European Agenda for Tourism: building blocks

- **Towards a European Tourism Data Space:**
 - ✓ Data access and sharing (EU Code of Conduct)
 - ✓ pilot on Smart Tourism Destinations
 - ✓ tourism statistics, big data (revision of Regulation 692/2011)
- **Upskilling and reskilling:**
 - ✓ Pact for skills in tourism (green skills, digital skills, crisis/risk management skills)
- **Working together:**
 - ✓ shared priorities and milestones

Empowering tourism recovery and resilience

NextGenerationEU, in particular the **Recovery and Resilience Facility**

Examples of tourism investments under the Recovery and Resilience Facility

- improving energy & resource efficiency of tourism infrastructure (*Flagship 'Renovate'*)
- supporting clean passenger transport trends (*Flagship 'Recharge and Refuel'*)
- enhancing green & digital skills for tourism workers (*Flagship 'Reskill and Upskill'*)
- supporting the digitalisation of tourism administrations (*Flagship 'Modernise'*)
- reducing seasonality through new, innovative tourism offerings
- promoting data-sharing and digitalisation of tourism SMEs

Some draft national **Recovery and Resilience Plans** contain **tourism-specific** investments/reforms and many address tourism through **horizontal measures**

The Commission facilitates **knowledge-sharing** on the RRF between tourism authorities

MFF 2021-2027 with relevance to tourism *(non-exhaustive list)*

- **Regional Development and Cohesion Policy Funds** (e.g. European Regional Development Fund (ERDF), European Social Fund Plus (ESF+), European Maritime, Fisheries and Aquaculture Fund).

Investments in tourism eligible under all 5 policy objectives

Tourism and culture the most popular areas under the European Territorial Cooperation (Interreg)

- **European Agricultural Fund for Rural Development** : *ecotourism, diversifying rural tourism offer, supporting rural tourism SMEs, construction and modernisation of tourism information centres*
- **InvestEU** : *sustainable tourism infrastructure and investments by SMEs*
- **Horizon Europe** : *innovation, digitalization, cultural tourism*
- **Creative Europe Programme** : *development of creative economy and cultural tourism*
- **Single Market Programme** : *capacity building of tourism SMEs and cross-border cooperation*

The Commission is preparing an **On-line guide to EU funding for tourism** (Q2 2021)