

Together for EU Tourism

STAKEHOLDER EVENT

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Panel discussion

Looking ahead: Opportunities & challenges for the tourism ecosystem

Panellists



Barbara Destrée
Head of Wallonia Tourism Administration, BE Presidency of the Council of the EU



Marie-Hélène Pradines
Head of Tourism Unit European Commission, DG GROW



Serafino Nardi
Head of Commission for Natural Resources, European Committee of the Regions



Barry Rogers
Head of Dublin City Tourism, 2024 Capital of Smart Tourism Winner



Charles-Etienne Bélanger
Director, International Social Tourism Organisation (ISTO)

Summary of discussions

What are the challenges & opportunities for tourism in the years to come?

From the perspective of the European Commission, Marie-Hélène Pradines, Head of the tourism unit in DG GROW, outlined that the main challenges for the tourism ecosystem are sustainability, digitalisation, skills mismatch, and labour shortages. While tourism remains a Member State competence, the European Commission plays a key coordination and support role, notably through funding. The Transition Pathway for Tourism, published in 2022 and co-implemented with stakeholders, serves as underlying framework for this support.

In the coming months and years, special attention should be paid to i) raising awareness on the benefits of digital tools and greener services for tourism stakeholders; ii) gathering and disseminating best practices to inspire and facilitate action; iii) ensuring accessible support for tourism SMEs across all Member States, leveraging both national and EU-level funding and networks (e.g. Enterprise Europe Network, European Digital Innovation Hubs, EU Cluster Collaboration Platform, etc.), and iv) ensuring an appealing job market within the tourism sector, accommodating both high-skilled and low-skilled workers.

Although the upcoming European elections introduce a certain level of uncertainty regarding the future, the European Commission is committed to continue supporting the tourism ecosystem, through activities such as the collection and publication of pledges, the forthcoming Stakeholder Support Platform, and the work of the T4T expert group. Some upcoming initiatives include a report on the implementation of the 2030 Agenda for Tourism (expected in 2025), the possible revision of the EU Regulation on Statistics and the continued construction of the Common European Data Space for Tourism.

From the perspective of a regional administration and current Presidency of the Council of the EU, Barbara Destrée (Belgium) highlighted the importance of looking at tourism holistically, as it impacts and is impacted by many other sectors and policies. During the informal meeting of European tourism ministers held last February in Louvain La Neuve, EU Member States discussed the challenges of the tourism industry and shared best practices. An example of best practice was Wallonia's toolbox to accompany tourism businesses in the digitalisation of their activity. Nearly 200 actions were identified, and 9 modules of personal digital training were created specifically for this initiative, that can benefit over three thousand tourism businesses in need to develop their digital maturity. As a representative of the Belgian Presidency of the Council of the EU, she shared that Belgium hopes for continued cooperation between Member States and EU institutions, and invited the next presidency, Hungary, to keep tourism high on the agenda and work towards the goals set by previous presidencies and the European Agenda for Tourism 2030.

On behalf of the European Committee of the Regions, Serafino Nardi, Head of the Commission for Natural Resources, highlighted that the Committee of the Regions consulted and collected the voice of its members regarding the challenges of the tourism industry from the perspective of regions and cities. This consultation identified three main challenges, including the seasonality of tourism, over-tourism, and the consequences of climate change.

From the perspective of a municipality, Barry Rogers, Head of Dublin City Tourism and winner of the 2024 Capital of Smart Tourism Award, emphasised that challenges arise from the evolution of tourism from a straightforward model focused on destination advertisement and competition to a complex landscape that requires collaborative efforts to address the challenges of sustainability, accessibility and digitalisation. Under the European Capital designation, Dublin has had to galvanise a specific vision for tourism which helps the communities and industry to come together and address challenges in a meaningful way. Dublin's opportunity lies in leaving a lasting legacy based on its transition from traditional tourism development into a new tourism future. Cooperation between the entire tourism industry is crucial to effectively address the problems that we are currently dealing with.

Finally, on behalf of the International Social Tourism Organisation (ISTO), Charles-Etienne Bélanger highlighted that in recent years, the social dimension of sustainable tourism has become increasingly recognised. Destination Management Organisations (DMOs) are now including not only visitors, but also residents and workers in their tourism strategies. With regards to visitors, 30% of EU citizens cannot go on holiday because of financial obstacles, while accessibility remains a challenge for many tourism sites. Opportunities arise from facilitating travel for these demographic groups based on seasonality and domestic policies. The challenge lies in how to ensure that local populations are part of the decision-making process, and to ensure that social



acceptability of tourism is not overpassed. Regarding workers of the tourism industry, it is essential to address their working conditions, level of training and degree of satisfaction. Motivating them is key to addressing the workforce shortage effectively.

What are the opportunities and challenges for rural tourism more specifically?

Serafino Nardi mentioned that the Committee of the Regions (CoR) developed a study for regions and cities in collaboration with UN Tourism on how to implement measures to run tourism places in rural areas. The CoR published another study entitled 'The Geography of discontent', which observed a tendency of rural areas to vote against Europe. That is why the CoR developed a long-term vision for a rural agenda, aiming to transform this process into opportunities for rural areas. He highlighted that rural tourism serves as a potential solution to the issue of seasonality. It should be perceived as complementary to traditional city tourism (rather than oppositional), serving to alleviate over-tourism during peak seasons. It should be kept in mind that rural areas face additional challenges, including resource scarcity and demographic concerns, necessitating strategies to retain and attract residents. Addressing the digital connectivity gap is crucial to effectively tackle demographic challenges in rural regions.

What is happening in terms of social sustainability of tourism and social indicators?

Charles-Etienne Bélanger further expanded on current statistics in tourism, which do not provide sufficient data on the sustainability of tourism. A year ago, ISTO therefore initiated efforts to develop indicators for the social sustainability of tourism. This involved collaboration within their network, particularly with regions already possessing indicators linked to the social component of sustainability, as well as collaboration through the T4T expert group. He emphasised that it is necessary to agree on common, affordable, and comparable indicators.

Barbara Destrée added that it is imperative to approach social sustainability from various perspectives. A notable example is a survey conducted in Wallonia in 2022 with social tourism accommodations to measure their economic weight, and their contributions to sustainable tourism. Results showcase that accommodation facilities in this sector play a more significant role in the social pillar of Wallonia's economy compared to the general tourism industry. They predominantly employ local permanent staff and provide training to accommodate individuals with special needs, along with promoting environmentally friendly practices. Such establishments can serve as role models for tourism companies wanting to improve their sustainability.

What is the European Commission doing with regards to digitalisation and data sharing?

Marie-Hélène Pradines mentioned that digitalisation is identified as a big challenge for the tourism sector. Basic digitalisation serves as a precursor to adopting more advanced digital solutions such as big data and AI. Unfortunately, only 53% of companies in the hospitality sector possess basic digital intensity. Therefore, efforts to support digitalisation need to increase, including through the Enterprise Europe Network (EEN), European Digital Innovation Hubs (EDIHs), the Pact for Skills, and



funding under the Single Market Programme. Additionally, studies have been conducted to identify transferable digital tools and practices, alongside the recently concluded pilot project funded by the European Parliament and aiming at supporting digitalisation within the restaurant sector. The Commission also collected numerous pledges by stakeholders proving that efforts are ongoing.

In terms of data sharing, it is crucial to increase availability of and access to data. There are currently insufficient data collection mechanisms, particularly in terms of sustainability. Some efforts include the EU Tourism Dashboard, which combines different data sources to generate indicators related to the green and digital transition and the socio-economic resilience of destinations, and the Short-Term Rental Regulation, which will provide systematic data on short-term rentals. Efforts are also underway to achieve interoperability, build good governance and support emerging data sources contributing to the Common European Data Space for Tourism.

How has the Transition Pathway for Tourism and best practice sharing helped shape Dublin's new tourism vision?

Barry Rogers emphasised the achievements reached during the first two years after the publication of the Transition Pathway for Tourism. He highlighted that the Transition Pathway was fundamental in the process of transformation of Dublin's tourism industry and mentioned two ways in which Destination Management Organisations (DMOs) can be prompted to change. First, by getting inspiration from the achievements of other organisations and destinations. Second, by using the Pathway as a roadmap, as it is the direction set by the European Commission for where destinations need to be. It is fundamentally important, as it appeals to the competitive nature of DMOs which prompts them to adopt changes quickly. It is not a coincidence that two years into the transition of tourism, we are now looking at completely different destination strategies across Europe. Dublin responded to the Pathway by applying to the European Capital of Smart Tourism Award, establishing a clear path forward. Destination managers are facing similar challenges across Europe, and the presence of a common vision addressing these issues has been fundamental for Dublin to implement a highly ambitious tourism strategy for a very traditional tourism destination.

Recording: Click [here](#) to watch the recording of the session on YouTube.

