CALL FOR ACTION: ACCELERATE SOCIAL AND ECONOMIC RECOVERY BY INVESTING IN SUSTAINABLE TOURISM DEVELOPMENT

The European Tourism Manifesto alliance's contribution to the drafting of national recovery & resilience plans with reforms and investment proposals related to Travel and Tourism

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Introduction

According to the European Commission's Communication "Europe's moment: Repair and Prepare for the Next Generation"[1], travel and tourism is one of the most affected ecosystems by the COVID-19 pandemic and requires €161 billion[2] worth of investment to bounce back to pre-crisis levels. The new Recovery and Resilience Facility[3], proposed by the Commission to help the EU rebuild after the pandemic, offers an unprecedented opportunity to support tourism-related reforms to ensure that the sector helps to drive digital and green transitions, and thereby strengthens both economic and social resilience.

The aim of the Recovery and Resilience Facility is to provide large-scale financial support for reforms and investments undertaken by Member States, and to mitigate the economic and social impact of the coronavirus pandemic, making the EU's economies more sustainable and resilient. In order to benefit from this unprecedented funding opportunity, Member States must submit to the Commission by April 2021 their draft recovery and resilience plans outlining national investment and reform agendas in line with the twin strategic objectives: digitalisation and sustainability.

The European Tourism Manifesto alliance recognises and appreciates that a number of Member States have made specific mention of tourism-related investments in their draft recovery plans for the Recovery and Resilience Facility. The alliance calls on all Member States to follow the same approach: travel and tourism services and related infrastructure are critical for each country's long-term economic prospects. A large number of SMEs are directly and indirectly dependent on the visitor economy and, with sufficient support, can return employment to the economy faster than any other sector.

To support the work of Member States in preparing their plans, the alliance has prepared this detailed paper presenting a non-exhaustive list of reforms and investment ideas related to travel and tourism that would contribute to making EU countries' economies more resilient, so we will be better prepared to respond to future opportunities and challenges.

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[1] Communication from the European Commission "Europe's moment: Repair and Prepare for the Next Generation", 27th May 2020 - https://ec.europa.eu/info/sites/info/files/communication-europe-moment-repair-prepare-next-generation.pdf
[2] Commission Staff Working Document "Identifying Europe's recovery needs", accompanying the document Communication from the European Commission "Europe's moment: Repair and Prepare for the Next Generation", 27th May 2020 - https://ec.europa.eu/info/sites/info/files/economy-finance/assessment_of_economic_and_investment_needs.pdf
[3] Commission presents next steps for €672.5 billion Recovery and Resilience Facility in 2021 Annual Sustainable Growth Strategy, 17th September 2020 - https://ec.europa.eu/commission/presscorner/detail/en/qanda_20_1659

Why invest in Travel and Tourism?

MULTIPLIER EFFECT: Tourism is transversal and its extensive value chain touches upon multiple sub-sectors.

- Up to March 2020, travel and tourism was a healthy and expanding sector that experienced steady growth for over six decades[4].

- In the EU, the sector accounts for more than 9.5% of GDP, provides jobs to 22.6 million people[5] and has direct impact on transport, retail, the agro-food industry, and the wider economy.

- 1 EUR of value generated by tourism results in an additional 56 cents of added value in indirect effects on other industries[6].

- Europe is the number one tourism destination worldwide, representing half of the global market share of international tourism[7].

- It is estimated that cultural tourism accounts for 40% of all European tourism, 4 out of 10 tourists choose their destination based on its cultural offering[8]. Cultural tourism is one of the largest and fastest growing tourism segments worldwide[9].

- Europe is a mature business travel market, with its cities and regions attracting travellers domestically and long-haul. Business travel also has a spill-over effect on other sectors and industries, and may induce additional leisure travel spend.

- Europe is the world's leader in exhibitions with most globally leading trade fairs being held in Europe, a key means to catalyse travel within and to Europe as well as to accelerate innovation and transition for many other industries.

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[4] OECD (2021-01-26), "Managing tourism development for sustainable and inclusive recovery", OECD Tourism Papers, 2021/01, OECD Publishing, Paris - https://www.oecd-ilibrary.org/industry-and-services/managing-tourism-development-for-sustainable-and-inclusive-recovery_b062f603-en
[5] WTTC, EU 2020 Annual Research: Key Highlights (2019 data) - https://wttc.org/Research/Economic-Impact
[6] Communication from the European Commission "Tourism and transport in 2020 and beyond", 13th May 2020 - https://ec.europa.eu/info/sites/info/files/communication-commission-tourism-transport-2020-and-beyond_en.pdf
[7] UNWTO, "International Tourism Highlights", 2020 Edition, January 2021 - https://www.e-unwto.org/doi/book/10.18111/9789284422456
[8] European Commission, DG GROW, Cultural tourism - https://ec.europa.eu/growth/sectors/tourism/offer/cultural_en
[9] European Heritage Alliance Manifesto "Cultural Heritage: a powerful Catalyst for the Future of Europe", May 2020 - http://europeanheritagealliance.eu/author/alliance/

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ALIGNMENT WITH THE EU RECOVERY STRATEGIC GOALS: A healthy Travel and Tourism ecosystem can help achieve all four general objectives of the Recovery and Resilience Facility:

- **Promote the EU's economic, social and territorial cohesion**: with appropriate support, the travel and tourism sector can be one of the most effective engines to deliver sustainable development, as it supports employment across all areas and demographics. Travel and tourism contributes to wellbeing and generates revenue which is needed to preserve community identity, culture, and heritage.

- **Strengthen the Union's resilience**: Tourism is 90% micro/SME dominated[10], an important composition on which Europe's distinctiveness and appeal as a destination depends.

- **Mitigate impact of the crisis**: Smaller businesses always return employment to the economy faster than larger enterprises with greater economies of scale. In the travel and tourism sector access to short-term funding means long-term job generation.

- **Support green and digital transitions**: (Big) data and artificial intelligence have the ability to transform the travel and tourism sector. From reducing the impact of airline disruption and supporting decarbonisation efforts to real-time management of tourism flows, digital solutions could result in a tourism offer and value-chain that is more attractive, efficient and inclusive. With sufficient support, it will also be economically, socially and environmentally sustainable.

RISK AND OPPORTUNITY: Tourism must be firmly incorporated in the recovery and resilience plans adopted by the Member States. If it is not in the plan, it is not in the budget.

- It is essential that positive impact on the travel and tourism ecosystem is an evaluation criterion for all major components of Recovery and Resilience plans: the multiplier effect of any smart investment that also benefits tourism is highly significant.

- The COVID-19 crisis represents a once-in-a-generation opportunity to fund the reset by rethinking and reinventing one of Europe's most distinctive and successful sectors, and one of its best exports.

- Without that sectoral regeneration, the socio-economic risks are severe. According to UNWTO[11], Europe saw a 70% decline in tourist arrivals in 2020 and WTTC[12] estimates that 11.5 million travel and tourism jobs were already impacted in the EU.

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[10] Communication from the European Commission "Tourism and transport in 2020 and beyond", 13th May 2020 - https://ec.europa.eu/info/sites/info/files/communication-commission-tourism-transport-2020-and-beyond_en.pdf
[11] UNWTO World Tourism Barometer, January 2021 - https://www.unwto.org/unwto-world-tourism-barometer-data
[12] WTTC, Recovery Scenarios 2020 & Economic Impact from COVID-19, November 2020 Projections - https://wttc.org/Research/Economic-Impact/Recovery-Scenarios

Reforms

Tourism is historically a resilient sector which requires a new strategic approach to recover from this crisis and stimulate broader and better recovery of national and regional economies. This entails structural reforms in planning and promotion. It will also require an accelerated transformation of existing business and destination practices targeting sustainability and digitalisation to respond to new demand for a healthier and safer EU.

Member States have a unique opportunity to enable and support a seamless travel experience across Europe. What once might have seemed out of reach could and should now be designed and delivered, providing a transformative asset for the EU Single Market. This new single market for safe and seamless travel would also tackle the EU Cohesion objectives. Its governing frameworks and infrastructure could optimise and scale up European, national, regional and local sustainable tourism practices and make them the new normal.

Given tourism's cross-cutting nature, a range of investments and reforms will have an impact on its development. Tourism-specific reforms should form part of a wider strategy, and not be treated in isolation.

Some good policy examples are listed below:

1. Foster good practice in <u>destination management</u>, to include:
    o public-private-scientific collaboration in developing a long-term strategy for recovery and regeneration; product development and promotion;
    o sufficient stakeholder consultation within destination and among neighbouring communities and regions; cross-sectoral and vertical coordination of governance and related competence;
    o effective success metrics and related management accountability.
2. Rethink and build consensus for <u>tourism's success metrics</u> in relation to all aspects of sustainability.
3. Promote <u>public-private partnerships</u>' role in tourism development. Effective partnerships are expected to have a significant impact, generate funding opportunities and create promotional synergies among destinations.
4. Review <u>financial protection mechanisms</u> to restore confidence among both consumers and business. For example, encourage development of insurance product for businesses and/or consumers to provide protection in the event a positive COVID-19 test necessitates cancellation.
5. Raise the profile of <u>tourism as a quality employer</u> by fostering innovation, entrepreneurial schemes, skill upgrades, reducing the seasonality and precarity of jobs, providing opportunities for a wide range of individuals to participate in the visitor economy.
6. Encourage development of <u>year-round tourism</u> by diversifying the offer, especially in destinations traditionally better known for their seasonal appeal.
7. Encourage <u>geographically diversified tourism</u> through smart product development and promotion.

8. Support the <u>resilience of Europe as the leading tourism destination worldwide</u>, by:
    o promoting Europe as a tourism destination in both mature and emerging source markets;
    o expanding connectivity with long-haul destinations;
    o enhancing the process of obtaining a Schengen visa, and/or eliminating visa requirements altogether.
9. Ensure that tourism offer is <u>accessible for all</u>, with attention to the most vulnerable segments of the population.
10. Implement the basic principles of the <u>Barcelona Declaration on Tourism and Cultural Heritage</u>[13] to make destinations better places to visit, live and work, for residents, businesses, and visitors.

Further examples of strategic guidelines for sustainable tourism practices that will ultimately support the creation of a new tourism ecosystem in Europe can be found in the OECD Paper on Managing tourism development for sustainable and inclusive recovery[14] and ETC's Handbook on COVID-19 recovery strategies for National Tourism Organisations[15].

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[13] Network of European Regions for a Competitive and Sustainable Tourism (NECSTouR), Barcelona Declaration "Better Places to Live, Better Places to Visit", Brussels, 11th October 2018 - https://necstour.eu/better-places-to-live-better-places-to-visit

[14] OECD (2021-01-26), "Managing tourism development for sustainable and inclusive recovery", OECD Tourism Papers, 2021/01, OECD Publishing, Paris - https://www.oecd-ilibrary.org/industry-and-services/managing-tourism-development-for-sustainable-and-inclusive-recovery_b062f603-en

[15] European Travel Commission (ETC), "Handbook on COVID-19 Recovery Strategies for National Tourism Organisations", Brussels, September 2020 - https://etc-corporate.org/reports/handbook-on-covid-19-recovery-strategies-for-national-tourism-organisations/

Investments

The European Commission provides **Guidance to Member States on Recovery and Resilience Plans[16]**. **Below is a non-exhaustive list of investment ideas to enable travel and tourism to perform as a driver for recovery, support green and digital transitions and contribute to the wellbeing of both visitors and residents as well as businesses**. These tourism-related investments are grouped according to the EU flagship initiatives listed in the European Commission's Guidance and can be integrated in the national recovery plans.

1. Power up

OBJECTIVE: Invest in greening the tourism destination infrastructure (places of interest/attractions, accommodation supply, leisure spaces, meeting venues, mobility infrastructure, etc.) in line with the Renovation Wave for Europe. This will lead to greening our buildings, creating jobs, improving lives, reducing carbon emissions and shifting to energy efficient sources according to the Green Deal climate-neutral targets by 2050.

EXAMPLES OF DELIVERY MODELS:

The **"renovation wave of buildings: business event venues, tourism accommodation and leisure use"**
- Support the fast transition to entirely carbon free and self-sustaining operations of buildings as well as venues for trade fairs, exhibitions and business events (e.g. hydrogen power plants on site, solar technology).

The "**renovation wave of tourism businesses"**
- Support the development (e.g. consultancy assistance and support) of tourism businesses' roadmaps, introducing science based targets – setting greenhouse gas emission reduction targets in line with climate science – to achieve carbon neutrality by 2050 and secure future-proof growth (with a focus on aviation, cruises, tour vehicles, leisure activity providers, accommodation and offices, including retail facilities). In parallel, pilot and upscale next generation technologies to drive both a sustainable as well as a digital transformation.

The "**renovation wave of tourism mobility**"
- Green transition in the transport sector is needed. The promotion of collective transport means (e.g. rail, bus, coach, taxi, passenger shipping including cruise ships) and active mobility are some of the most effective ways to decarbonise transport and make efficient use of space and materials.

The "**renovation wave of leisure goods**"
- Support the development of eco-conception projects for building leisure goods (e.g. recreational boats) with identification of common objective criteria for their environmental performance (such as benchmarking eco-design actions, substitute materials, Life Cycle Analysis).

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[16] https://ec.europa.eu/info/departments/recovery-and-resilience-task-force_en

2. Renovate

OBJECTIVE: To support destination transition that can deliver:

i)   Smart management of social, cultural, environmental and economic impacts of tourism; and,
ii)   Tourism that is a source of prosperity, creativity and social innovation.

EXAMPLES OF DELIVERY MODELS:

"Modern and creative hubs of sustainability by greening the (urban) spaces and by investing in human capital"
- Building greener tourism infrastructure across the value chain, including accommodation, exhibition and event venues, transportation and activities:
    o   Implement eco-renovations to make hospitality establishments more user friendly (e.g. development of efficient cooling and heating systems);
    o   Enable easy access for businesses to establish sustainability certifications (reduce barriers to entry) and offer them to the tourism value chain (e.g. the Austrian Ecolabel is currently not available for cable cars);
    o   Expand the use of solar/PV panels on existing buildings (e.g. hotels, offices);
    o   Support the renovation for more energy efficient of exhibition and event venues and smarter use of the facilities (e.g. to improve logistics, avoid traffic, reduce set-up and dismantling times, flow of workers and visitors, etc);
    o   Support the reuse and valorisation of heritage buildings, monuments and sites to develop a greener and more sustainable tourism infrastructure (meeting places, accommodation, hospitality establishments, etc.) that respects the cultural and natural value of the places and makes use of their embodied energy before looking for new constructions.
- Promote the employment of local people in tourism through political incentives or support programmes (e.g. tax breaks, etc.) or by offering certification schemes for such businesses.
- Secure sustainable recovery for large businesses as well as SMEs in the tourism sector through credible and internationally approved/recognised sustainability certification schemes (e.g. certifications for hotels approved by the Global Sustainable Tourism Council (GSTC)).
- Add tourism value to networks such as Natura2000, establishing them as a touristic brand for eco-travel, nature travel, etc. at national or EU level (coordinating national initiatives).
- Invest in promotion and make funding available so that natural remedies based on mineral water, landscape and climate are available to as many citizens and visitors as possible by reducing future expenses in healthcare and social care.

"Modern and creative hubs of sustainability by fostering climate change adaptation of fragile ecosystems"
- Development, renovation and environmental transformation of coastal and inland marinas for recreational boats (such as new berth space where required, renewable energy installations, power storage, waste disposal facilities, small-scale local desalination, climate change adaptation).

- Development, renovation and environmental transformation of inland waterway infrastructure for recreational boating and water sport uses (such as locks, marinas, docks, slipways, etc.).
- Roll-out of eco-friendly permanent mooring solutions for recreational boats in protected areas.

"**Modern and creative hubs of sustainability by engaging into circularity**"
- Pilot and upscale circular economy practices including water circulation systems in tourism establishments and waste management in destinations.
- Invest in projects that minimise food waste across the value chain.
- Invest in research at national or international level to develop more eco-friendly products (e.g. developing affordable replaceable materials for single use plastic food containers).
- Continue to work on the recovery and recycling of packaging through national schemes, and invest in R&D projects to reduce overpackaging and to minimise packaging waste.

"**Modern and creative hubs of sustainability through the farm-to-fork approach**"
- Prioritise government support to tourism establishments that commit to sourcing ingredients locally and have introduced healthy/local approaches to food procurement and provision (as this in turn supports the local economy) also having in mind that local food is part of the local culture and is therefore an asset for sustainable tourism.

"**Modern and creative hubs of sustainability by shifting to sustainable mobility and door-to-door solutions**"
- Support the reuse and valorisation of heritage travel infrastructure to promote innovative and sustainable forms of tourism, for instance slow tourism (e.g. railways, historic means of locomotion, ancient routes, etc.).
- Improvement of infrastructure for sustainable and active travel:
  o Accelerate the development of cycling infrastructure to boost active and clean energy travel and transition to a greener tourism. This should include the deployment of new non-motorised infrastructures and the upgrade of the existing ones, as well as re-using as much as possible abandoned transport infrastructure, mainly disused railways, for cycling and walking;
  o Improve connectivity between the non-motorised routes (as greenways and cycle routes) and the main attractions nearby (natural as e.g. N2000, cultural and natural UNESCO sites and other heritage assets), small villages and surrounding areas. Furthermore, improve connectivity with public transportation to facilitate intermodality, removing obstacles to favour cycle routes, their services and attractions, for tourists and local people;
  o Facilitate combined travel (bicycle + train /boat /buses).
- Invest in smart and sustainable mobility projects, in the whole battery value chain (from material to recycling), in renewable hydrogen technology, in sustainable alternative transport fuels (e.g. for road, air and seagoing tourism transport).
- Invest in biodiversity and nature-based solutions (e.g. improving infrastructure in protected areas in nature tourism, planting trees, greening urban areas).

3. Recharge and Refuel

OBJECTIVES: To accelerate the use of sustainable, accessible, smart and multimodal transport by promoting future proof clean technologies, providing and deploying charging and refuelling stations, extending public transport, and by developing sustainable alternative fuels for aviation and cruises, etc. This will reduce the transport emissions in destinations and between them. Encourage smart product development, including 'slow tourism' and new travel patterns.

EXAMPLES OF DELIVERY MODELS:

"Invest in research, development, and deployment of the necessary infrastructure and alternative fuels"
- Support research, development, infrastructure and deployment of clean synthetic fuels and/ or biofuels (such as electrification, hybrid engines, hydrogen, new fuels and propulsion systems) for cruise ships, recreational boat engines and passenger transport modes, such as coaches and other longer distance vehicles, while maintaining a technology-neutral, cost effective, goal-based approach and decreasing carbon emissions.

"Promote multimodality and environmentally friendly modes of transport systems"
- Promote cycle-friendly modes of public transport (in airports, railways stations, harbours, bus terminals), including installation of self-sufficient charging stations for e-bikes.
- Pilot sustainable modes of transportation including the introduction of electric or hydrogen powered vehicles. Promote charging infrastructure at tourism and business locations, thereby ensuring electric or hybrid vehicles can be properly utilised.
- Invest in safe, direct and connected infrastructure to further develop long distance, transnational hiking and cycling, etc. route networks (e.g. the EuroVelo network); develop friendly services that address the needs of users of such routes; and promote European cities and regions as slow and health tourism destinations.

"Upgrade existing fleet renewal, and build charging and refuelling infrastructure for both recreational and passenger transport"
- Incentivise retrofit and upgrades of recreational boats' engines (such as replacement of old two-stroke engines, biofuel, electric, hybrid).
- Fleet renewal (buses and coaches): The development of vehicle fleets running on alternative fuels, covering both new and second-hand vehicles, has to be accelerated. Not only electric/hydrogen vehicles, but also biofuels and synthetic fuels for coaches are key to reduce CO_2 emissions.

"Accelerate collective passenger transport's connectivity, accessibility and attractiveness for residents, businesses and visitors"

- Use technology to develop smart travel facilitation, such as smart visas, borders, security processes and infrastructure.
- Invest in integrated connectivity solutions, including inter and multimodal journey planning and ticketing (air, rail, road and water) for locals and visitors to benefit from sustainable mobility and optimal accessibility.
- Provide a mobility-leisure activity card for residents inspired by the guest card model, thereby not only creating benefits of connectivity for the local population but also turning locals themselves into users of the tourism infrastructure.
- Make rail transport more attractive, by investing in modern rolling stock, increasing the high-speed network, opening distribution, etc.
- Improve surface access to ports and airports to improve public transport usage to and from international gateways.
- Support digitalising the road transport sector and digital infrastructure as part of integrated smart connectivity plans: support operators in developing their digital infrastructure, such as software which creates a foundation for data exchange, enabling interoperability with other operators and digital service providers.
- Invest in smart traffic management systems along road transport pathways.
- Invest in coach terminals and connecting intercity and tourism services by bus and coach with local mobility services to make those services more attractive and further boost the decarbonisation of transport.
- Invest in connecting coastal regions to the hinterland.
- Improve access connections between European health resorts with natural remedies (balneology spa medicine, climatic health resort – destinations) with hubs, such as bigger cities through public transport to stimulate prevention and rehabilitation for people who suffered from coronavirus disease.

4. Connect

OBJECTIVE: To make possible a fast rollout of affordable rapid broadband services to all areas, households and businesses, including fibre and 5G networks. This will support all aspects of work, leisure, education and business, and enable the dispersal of value-adding activity through remote working and increased opportunity for collaboration and commerce.

EXAMPLES OF DELIVERY MODELS:

"Accelerate the destinations' and tourism SMEs' connectivity by providing the widest uninterrupted coverage for residents, businesses and visitors"
- Invest in fast rollout of rapid broadband services to rural, coastal and mountainous areas, especially in the surroundings of non-motorised, cultural and natural thematic routes (such as greenways), to enable the digitisation of SMEs.
- Invest into transformation of public and private spaces of tourism usage - exhibition venues, cultural and natural heritage sites and institutions, marinas, etc. - into a customer-centred digital infrastructure to leverage the full potential of their role in boosting the industrial transition to digital and sustainable: fast rollout of 5G, Wi-Fi and general digital infrastructure.
- Support self-organised and self-guided tours and itineraries all over the territory, based on IT applications (GPS points, geopositioned information, real-time availability and booking facilities, etc.).

5. Modernise

OBJECTIVE: Empower public authorities, destinations, and SMEs across the tourism and travel value chain with the use of digital tools for them to offer digital (public and private) services and diversify their offer and innovate, in order to deliver smart governance, compete globally and perform within sustainable parameters.

EXAMPLES OF DELIVERY MODELS:

"Empower the public and private tourism actors with digital tools to deliver better governance, diversification of products and marketing"
- Invest in sustainable tourism promotion at all levels (regional, national, European and global) to help the recovery of travel confidence in domestic, intra-European and long-haul markets and maintain the current position of Europe as the world's leading tourism destination.
- Incentivise transnational and pan-European cooperation in promoting Europe as one destination in third markets.
- Invest in the digitalisation of tourism public administration and their services by supporting the digital transformation of Destination Management and Marketing Organisations by equipping them with digital tools to smartly operate with their ecosystem and level the playing field between the different levels of digitalisation of the actors: tourist offices, travel agencies and hotels, cultural and heritage facilities and providers, thematic routes related to natural and cultural heritage.
- Promote better use of technologies, including the Internet of Things, location-based services, artificial intelligence, augmented and virtual reality, and blockchain technology to improve the tourism offer to make it more attractive, enjoyable, efficient, inclusive, and economically, socially, culturally and environmentally sustainable.
- Support the creation of alliances between tourism operators for the development of digital solutions that diversify products (also through European networks).
- Support development of digital tools to digitise the existing offer of companies for a better travel experience (e.g. boating experience - such as marinas, navigation, maintenance, weather information).
- Promote increased cooperation between the hospitality/hotel industry and producers/service providers, e.g. by creating digital marketplaces and offering certifications/awards for regional focus.
- Develop and enhance online platforms to share the value of cultural heritage to increase awareness of nearby cultural heritage and make adaptive re-use more frequent.
- Provide support for the development of mobile applications to improve services (e.g. menus; check-in/check-out; accessibility of cultural institutions and events; improve personalised service).
- Promote and invest in biometric solutions that can reduce friction caused by physical touchpoints to reignite consumer confidence and accelerate the adaptation and recovery of the sector.

"Build digital infrastructure to connect public and private travel and tourism actors with health authorities to optimise cooperation for better services"

- Development of multi-sensor devices and software to connect public health and health resorts and to follow the health conditions and positive effect of medical spa treatment through smart technology. The goal is to connect and schedule treatments with specialists and physical activities - age actively and live longer by detecting issues earlier.
- Invest in further science-based funding of health tourism, as medical spas and climate health resorts may help to reduce public health costs through prevention and would further improve sustainability and productivity in Europe. Promoting the European health tourism offer presents a clear path for faster social and economic development and combating seasonality.

6. Scale-up

OBJECTIVES: Develop and implement a tourism data strategy enabling public authorities to gather, or in any case access, reliable data for adequate and sustainable tourism management, and enabling business to benefit from better intelligence. This includes promoting data collection and access (respecting necessary privacy requirements) that allows more efficient management for both business and destinations, including use of real-time data.

EXAMPLES OF DELIVERY MODELS:

"Invest in smart tourism data and its necessary digital infrastructure for the use of all actors of the travel and tourism sector"
- Ensure that travel and tourism is considered a strategic priority for the European Industrial data cloud. Promote mobility and travel data space and use cases through potential collaborative projects where funding might be needed.
- Provide funding for (pilot) digital products aimed specifically at improving tourists' experience.
- Invest in digital transformation, equipped with tools that make road transport more efficient (for e.g. measuring tourism flows/destinations) so that supply and demand can be matched much better than at present.

"Improve the use of data in sustainable tourism management"
- Use technology to measure impact, predict and manage travellers and tourist flows in order to more efficiently and effectively manage sustainable and resilient destinations.
- Install cutting-edge counters along greenways and cycle routes for data gathering on cycling and walking users, to gain detailed information about the user behaviour – frequency, peak hours, preferred areas – to help planning and for measuring the impact of investments. Permitting sharing data and benchmarking, counters are a strategic tool for the elaboration of tourism promotion plans.
- Finance research for the development of smart tourism data. Develop a system where private businesses have access to data-sharing instruments and plans in order to make the offer to clients more attractive, adapt swiftly to changing conditions, and to minimise risk of a digital divide.
- Implement existing and proven measurement tools on a voluntary basis at EU level (such as ETIS) or international level (UNWTO's Measuring Sustainable Tourism Framework, GSTC methodology or similar), to be integrated with specific tailor-made indicators, in order to collect dynamic information at destination level. Promote the uptake and use of sustainability standards, and alignment/comparability of metrics in order to promote transparency and measure progress efficiently.
- Encourage the development of success metrics for tourism promotion that encourages more sustainable activity and public benefit as a result of publicly-funded investment.

7. Reskill and upskill

OBJECTIVE: Ensure that tourism's workforce has access to new technologies and practices and sufficient support to become proficient users. Promote lifelong learning and suitable training schemes for all, 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. Promote European mutual recognition of such schemes.

EXAMPLES OF DELIVERY MODELS:

"Adapting current educational and formation systems to the new challenge of the sector: digitalisation"
- Adapt education systems to support digital skills and educational and vocational training for all ages to businesses' needs, including new products of emerging tourism (cycling, nature, outdoor, heritage, nautical, etc.). Fund educational programmes for developing sustainable, digitally advanced tourism programmes for the new era in tourism.
- Develop digital training platforms offering free access to digital training and practical support to hospitality staff with regular updated resources covering e.g. safety and hygiene, operations and profitability, team management, skills and guest experience, etc. Online certifications should be considered.
- Access to lifelong training for all, regardless of being an employee, employer, unemployed, self-employed, etc. through training vouchers, training accounts, etc.
- Tourism sector skills alliance at regional, national and EU level – implement and adapt to the current environment the Blueprint Strategy and results of the Next Tourism Generation Alliance in the fields of digital, sustainability and social skills.

"Provide technical support on the reskilling and upskilling process"
- Support tourism training and capacity-building programmes that create career opportunities, especially for women and young people, in vulnerable, marginalised communities.
- Give particular support to apprenticeship schemes, which provide young people with profound vocational training and an excellent entry point into the labour market (many apprenticeships are currently suspended due to the COVID-19 pandemic).
- Support incubators, accelerators and labs that encourage partnerships between tech and travel/tourism/ exhibition companies.
- Technical advice and support programmes and structures for micro-initiatives (mid- and long-term), ideally in public-private partnerships with professional entities that cover the respective sector or activity.
- Develop a complete programme to introduce SMEs in internet sales (skills, joint platforms, promotion).
- Digital skills and jobs: There is an unprecedented need for the training of drivers to develop their digital skills and adapt to new technologies, such as autonomous vehicles. Hence, investing in e-learning and related tools and modules is key in the road transport sector.

"Provide funding to support upskilling and reskilling schemes, including training"

- Provide funding support for digital and sustainable upskilling and reskilling programmes to tourism companies of all sizes, as there is also a need for legacy market players to develop their existing workforce. Such initiatives could be developed to make platforms available to other tourism companies and beyond, in which best practices, particularly on sustainability are shared.
- Provide practical training, including support to the digitalisation of SMEs for better digital management of their businesses, customisation of the service offer and the promotion of tourism products; supported by mentoring for SMEs and micro-enterprises in the tourism sector and the exchange of good practices to favour collaboration (local, regional, national and transnational).
- Support businesses/employers as well as tourism and culture freelance professionals and employees in substantially re-/upskilling their workforce during periods with less economic activity.
- Support training and capacity building for digital skills in the heritage and cultural sector to enable them to offer high- quality digital services, generating higher quality experiences and greater enjoyment for visitors.
- Create an "etiquette"/code of conduct for holidaymakers and also tourism businesses/ employees/ students attending tourism schools.
- Support and promote small businesses with professional marketing.
- Subsidise coaching schemes for family businesses (professional employee management, employer branding, etc.).

Where to find examples?

(Draft) National recovery plans:

- <u>France Relance</u>

- Espana Puede (<u>Spain</u>)

- Linee guida per la definizione del piano nazionale di ripresa e resilienza (<u>Italy</u>)

- Recuperar Portugal 2021-2026 (<u>Portugal</u>)

- <u>Germany</u>

- <u>Flanders</u> recovery plan (Belgium)

- <u>Wallonia</u> tourism recovery plan and <u>Visit Wallonia</u> pass (Belgium)